



**EVANSTON  
PUBLIC  
LIBRARY**

# Evanston Public Library

## Library Policies

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## Collection Development Policy

### 1. Purpose

The purpose of this policy is to guide librarians and to inform the public about the principles upon which selection and retention decisions are made. A policy cannot replace the expertise of professional library staff, but stating goals and indicating boundaries will assist them in both choosing from an array of materials and electronic resources and withdrawing or canceling materials and electronic resources which are no longer useful.

### 2. Responsibility for Selection

The selection of library materials and certain electronic resources within the framework of a Library Board-approved selection policy is an administrative function and is one of the duties and responsibilities of the Library Executive Director. They shall delegate this responsibility to appropriately trained and skilled staff members, who will be guided by this policy, literary standards, selection tools, the interests of library patrons, and the needs of the community and its individual members.

### 3. Objectives

The collections and electronic resources of the Evanston Public Library are the principal means by which the Library fulfills its mission as stated by the Library Board in its Mission Statement. The Library seeks to develop a meaningful collection that is positioned to meet the needs of the community and supports equity, diversity, and inclusion. The Library will strive to provide materials and electronic resources that:

- A. Enrich, entertain, and serve the varied interests of community residents;
- B. Provide community residents with reliable information sources for their personal needs; and
- C. Reflect the diverse religious, racial, ethnic, and cultural backgrounds of our community and our world.

The Library Board recognizes that many materials and electronic resources are controversial and that any given item may offend some patrons. "Controversial" in this case is defined as "giving rise or likely to give rise to public disagreement." Selection decisions are not made on the basis of anticipated approval or disapproval, but on the ability of the item to serve the needs and interests of Evanston residents. The Evanston Public Library Board of Trustees is bound by the democratic principles expressed by the First Amendment to the U. S. Constitution and endorses the American Library Association's "Library Bill of Rights," and incorporates it as part of this policy.

### 4. Guidelines for Selection

Selection is a critical and interpretive process. Reviews are the principal tool used in the selection of library materials and electronic resources. Staff members selecting library materials and electronic resources are also assisted by bibliographic publications, authoritative discussions of the subject, publisher and vendor advertising and demonstrations, popular demand, and requests of library patrons. In selecting materials for the Evanston Public Library the following criteria will be used as they apply:

- A. Comprehensiveness and depth of treatment; clarity, accuracy, objectivity and logic of presentation; artistic quality and/or literary style as established by reviews in standard selection sources
- B. Permanence, current relevance, or social significance of the content
- C. Reputation of author, producer, or publisher
- D. Contribution to the diversity of viewpoints on controversial issues
- E. Suitability of the physical format for library use
- F. Local interest and popularity
- G. Reference value

Selection of digital content can vary among the vendors who supply digital content to the library. In instances when individual title selection is not available, selection of the service will be based upon the reputation and overall content offerings of the vendor.

## 5. Youth Materials

Materials especially suited to young people from infancy through sixth grade are housed in the Youth Service areas of the main Library as well as the Library's branches. A collection of materials for young people of middle school and high school age is also housed in the Library's Teen Services room (The Loft), and in special areas of the branches. These materials are carefully selected for younger patrons using the same general guidelines as the adult collections. The assignment of maturity or reading levels to youth materials is done according to publisher and reviewer recommendations as an aid to library patrons. It is not intended to restrict any person in their use of the Library. All library collections and resources are available to any Evanston cardholder.

Parents/caregivers/guardians have the responsibility for the guidance of their child's use of the Library and its resources. The Library does not collect textbooks, academic, or technical materials unless they are considered useful generally or supportive to the [Library's Strategic Plan](#).

## 6. Format

The Evanston Public Library began as a collection of books and other printed materials and these remain the cornerstone of the Library's collections. Almost from its beginning, however, the Library collected informational and cultural resources in audio and visual formats as well, and such resources represent an important component of the Library's collections. Today, the Library also provides access to a variety of electronic resources that don't exist as a physical presence in the Library's facilities. Selection criteria for non-book formats are generally the same as for print materials. These materials may be available in a variety of formats. Factors governing the choice of format include anticipated use, storage requirements, ease of access, and the format of earlier editions. When all other factors are equal, ease of access by the public should be the primary consideration.

Availability of items in the format, the cost per item, and the Library's ability to acquire and handle the items will be factors in determining when a new format will be collected. Similar considerations will influence the decision to delete a format from the Library's collections.

The Library recognizes the importance of acquiring materials in formats that can be utilized by Evanston residents with disabilities. The Library will seek to match community

demand with the existing collections of such materials, and will be alert for new formats that could be of use by residents with disabilities.

## 7. Collection Maintenance

The Library regularly withdraws materials that are out of date, no longer of interest, duplicated, worn, or mutilated. Weeding the collection in this manner serves three purposes. First, it keeps the collection useful to library patrons by withdrawing those materials that are too dated or damaged to be useful. Second, it makes it easier for patrons to use the collection by eliminating the necessity of sorting through those items that are no longer of interest or use. Third, it maintains the Library's collections at sizes appropriate to the Library's facilities. Frequency of circulation, community interest and needs, and the availability of newer and more useful works are the primary considerations when making decisions to withdraw library materials.

Click here for information about [Resident Requests for Re-evaluation of Library Material](#).

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# Evanston Public Library Services

It is the policy of the Evanston Public Library to optimize availability of library services and programs throughout the community. Library staff and the Board of Trustees shall determine the most equitable means to accomplish this goal. Services may be provided at a variety of community sites. In collaboration with the community, library trustees, librarians, and other library staff, EPL will decide how library services should be provided to their patrons.

The Library Board establishes, in consultation with the Library Executive Director, hours of service to be provided at each library service point, loan periods for materials, and fees for library services. These are reviewed periodically by the Library's staff and the Library Board.

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# Rules for Library Use

Amended Nov. 16, 2022

## 1. Rules for Library Use

The Library's rules are designed to promote the safety and security of the Library's patrons, staff and collections, and to ensure that the Library remains a space for everyone to read, work, study, connect and build community. If your circumstances make it difficult for you to comply with Library rules, please talk to our staff who may be able to connect you to helpful resources.

- 1.1 Be respectful and do not interfere with other people using or working in the Library.
- 1.2 Eat food or snacks in designated areas only. Beverages in covered containers are welcome anywhere.
- 1.3 Alcohol, drugs, vaping, and smoking are not allowed.
- 1.4 Service dogs individually trained to do work or perform tasks for people with disabilities are welcome. Pets are not allowed. (Refer to ADA guidance on service animals.)
- 1.5 The Library is not responsible for unattended items.
- 1.6 Children age 11 and older may be at the Library without a caregiver's supervision. (See unattended children below for more details)
- 1.7 Don't solicit, petition, canvass, or sell on Library property.
- 1.8 Don't use roller skates, roller blades, skateboards or other recreational mobile devices on Library property.
- 1.9 Always wear shoes in the Library.

## 2. Suspension of Library Privileges

The Illinois Compiled Statutes, Chapter 75, Paragraph 5/4-7, permit the Library Board "To exclude from use of the library any person who willfully violates the rules prescribed by the board."

Library privileges may be suspended for the persistent and willful violation of the Library's posted rules and violations of the law.

## 3. Unattended Children

### Unattended Children

Whether or not they are present, parents or guardians are ultimately responsible for the behavior of their children in the Library until they reach the age of eighteen (18).

### Supervision guidelines for children

- Ages 7 and under: Must be within reach of a caregiver who is age 14 or older at all times.
- Ages 8-10: Must have a caregiver who is age 14 or over in the Library.
- Age 11 and older: May be at the Library without a caregiver's supervision provided they conduct themselves in a manner appropriate to the Library's expectations.

If these guidelines are not followed, staff members will attempt to locate the caregiver of a child under the age of 11. If the caregiver is not in the building or cannot be contacted, staff is authorized to call the appropriate City of Evanston authorities to ensure the safety of the child.

### Unattended children at closing

If a child under the age of 11 is left unattended at the time of closing, the Person In Charge and another member of the staff will attempt to reach the caregiver and/or remain with the child for a period of fifteen (15) minutes. If a parent or other responsible caregiver does not pick up the child during this period, staff is authorized to call the appropriate City of Evanston authorities to ensure the safety of the child.

## 4. Guns on Library Property

The Evanston Public Library follows Illinois State Law [430 ILCS 66], which prohibits the carrying of any weapon, including concealed or partially concealed, in Library buildings or on Library property.

If library staff observe a weapon on Library property, the police will immediately be called.

## 5. Exhibits

The exhibit space of the Evanston Public Library is a library resource to be used to fulfill the Library's mission statement. It is the intention of the Library Board that the Library's program of exhibits represents the intellectual, cultural, and ethnic diversity of Evanston. Creators who use this space release the Evanston Public Library, its Board, and its employees from any liability for injury or damages, destruction, loss or theft of any item or items that may occur during the exhibit period or during installation or removal of the exhibit. The Library does not provide any security or insurance for artwork exhibited.

## 6. Library Bulletin Boards, Flyers, and Community Marketing

A limited amount of bulletin board space is available for postings by nonprofit organizations engaged in educational, cultural, intellectual, or charitable activities in

Evanston. The Library is not responsible for the care or return of posters. The following items will not be accepted for posting:

- Advertisements of products or services offered by commercial organizations or individuals
- Requests for contributions
- Petitions
- Electioneering materials

## 7. Political Activity

The Library is governed by the City of Evanston's policy concerning the use of municipal buildings by candidates for Federal, State, and Municipal elected office, the Democratic, Republican, and other parties, and all other individuals or organizations advocating a position on an election issue.

The Library's public meeting rooms may be used for any political activities related to an election, until one-hundred (100) days prior to the election, except for Municipal election activities. Municipal election activities may be held until the petition filing deadline, which is seventy-one (71) days before the election. After these deadlines, the meeting rooms may only be used for candidate forums when the following conditions are met:

- All candidates are invited to attend.
- The forum is sponsored by a non-partisan group.
- All candidates for a particular office must agree in writing to attend the forum or indicate in writing that they do not oppose the forum being held even though they are unable to attend.
- Fees will not be charged for candidate forums meeting these conditions, but all other meeting room rules must be observed.

See the "Public Conference Rooms and Public Meeting Room Rentals" section of this policy, below, for further guidance.

No spaces other than the public meeting rooms may be used for political activities.

## 8. Areas for Young People in the Library

The Evanston Public Library has two areas of the Main Library – the Children's Room and the Loft – set aside to provide library service to young people. The Library staff will ask adults who are not using the special collections and services of these areas to relocate to other areas of the Library.

## The Loft

The Library's teen space, known as the Loft, is intended for young people in grades 6 through 12 or ages 11-18. Other library patrons, like adults and younger children, are permitted to use the space when they require collections or services that are only available in that space, but they will not be permitted to use this space for general reading, studying, or hanging out. The Loft will not be open all of the hours that the Library is open, but will be open at those times teen users can be expected to be present.

## 9. Public Conference Rooms and Public Meeting Room Rentals

### 1. Hours

All public conference rooms and public meeting rooms are available during the Library's regular hours.

#### Public Conference Room Use

Both the Main Library and the Robert Crown Branch Library have conference rooms that are intended for the use of small groups. They are not available for public meetings or commercial use. Some rooms are only meant for families, children, or teens. Each room has a group size limit. These rooms may be used free of charge and reserved through the Library's website, by phone or in person.

### 2. Public Meeting Room Use and Rental Policy

The Main Library has rooms that can be rented by outside groups for a fee. These rooms are available for public meetings of nonprofit organizations engaged in educational, cultural, intellectual, or charitable activities in Evanston. Library-sponsored programs have priority in reserving meeting room space.

The Library's public meeting rooms are not available to commercial enterprises (organizations or individuals that promote or cause the sale of property or services for monetary gain) or for purely social functions (functions designed for entertainment through companionship with friends and associates such as receptions, showers, birthday parties, dances, and mixers).

Use of the public meeting rooms does not constitute Library endorsement of the viewpoints expressed by the participants in the meetings. No advertisement or announcement implying such endorsement will be permitted. No organization meeting at the Library shall use the Library as its official address. Organizations using the public meeting rooms are not permitted to store items in the rooms.



Meetings may not disturb the normal operations of the library or create an unsafe environment.

The Library maintains the right to cancel any meeting room reservation for any reason. The decision of the Executive Director to cancel a reservation is final.

All meetings must be open to the public and attendance may not be restricted.

### 3. Renting Public Meeting Rooms

Main Library public meeting rooms must be rented by calling 847- 448-8650 or online . Applicants must be 18 or older. The application will be reviewed by Library staff before approval of the reservation. When a reservation is approved, payment will be charged to the credit card provided in the application form. The person submitting the application form will be held responsible for all fees and damages. The Library should be notified of any canceled meetings or programs. Failure to notify the Library of a cancellation at least forty-eight (48) hours in advance will result in the forfeiture of meeting room fees.

### 4. Admission Fees Not Allowed

Organizations using the public meeting rooms may not charge an admission fee. Organizations using the meeting room may request a free will donation, but making such a donation must in no way be a requirement for attending the meeting.

### 5. Sales of Goods During Public Meetings

Organizations using the meeting rooms will be permitted to make sales under the following circumstances:

- The sales must be confined to the meeting room space and no effort can be made to solicit other library patrons.
- The sale must be for the benefit of the nonprofit organization making use of the meeting room.
- Making a purchase must in no way be a requirement for attending the meeting.
- The sales must be an inconsequential part of the program scheduled for the meeting room.
- The sale of goods that directly or indirectly benefit the Library will be permitted in areas of the Library other than the meeting rooms. When an author takes part in a Library-sponsored program, the Library may arrange for the sale of the author's works at the program.

## 6. Kitchen Use and Food Service

Simple refreshments or snacks may be served at public meetings. The kitchen cannot be used for cooking. Groups using the kitchen are expected to leave it in the condition they found it; failure to do so will result in a clean-up charge.

## 7. Set-up and Clean-up

Trash should be picked up and the kitchen should be cleaned by the group using the room. Set-up and clean-up should be accomplished within the time period for which the room is rented. If it is necessary for Library staff to clean up following a meeting, the individual, group, or organization making the reservation will be charged for the necessary time according to the current schedule of fees .

## 8. Additional Meeting Room Rules and Regulations

The following rules and regulations apply to all groups using the meeting rooms in the Main Library:

- Attendance at a meeting may not exceed the maximum number of people certified by the Fire Department as the occupancy limit for the room.
- Groups whose members are under the age of 18 must be accompanied by one adult chaperone for every fifteen (15) participants.
- Hazardous materials including, but not limited to, candles, paints, solvents, and explosives are prohibited.
- Groups using the facilities must comply with the Americans with Disabilities Act and upon 48 hours' notice are responsible for providing qualified interpreters and/or auxiliary aids as requested.

## 9. Damages and Liability

The Library is not responsible for the loss of, or damage to, any equipment or materials owned or rented by an individual, group or organization using its meeting rooms. Any individual, group, or organization using the meeting rooms shall be held responsible for willful or accidental damage to the Library building, grounds, collections, or equipment caused by the group or organization, its members, or those attending its program.

Any individual, group, or organization holding a meeting in the Library must fully release and discharge the Evanston Public Library Board, the Evanston Public Library, the City of Evanston, its officers, agents, and employees from any and all claims from injuries, including death, damages, or loss, which may arise or which may be alleged to have arisen out of, or in connection with, the meeting. They must further indemnify and hold harmless and defend the Evanston Public Library Board, the Evanston Public Library, the City of Evanston, its officers, agents and employees from any and all claims resulting from injuries, including death, damages, and losses, including, but not limited to the

general public, which may arise or may be alleged to have arisen out of, or in connection with, the meeting.

## 10. Denial of Meeting Room Privileges

Failure to abide by the Library's meeting room policy and rules of conduct may result in the cancellation or refusal of future reservations.

### 10.1 Appeals of Administrative Decisions Concerning Facilities Use

Anyone who believes that they have been unfairly suspended or denied permission to use the meeting rooms, the bulletin boards, or other Library facilities or to distribute materials and is not satisfied by the decision made by the Library Director or designee, may appeal to the Library Board. Notice of an appeal should be made in writing to the Library Director, who will inform the appellant of the date of the meeting at which the appeal will be heard.

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## Circulation

### 1. Library Cards and Accounts Policy

#### 1.1 Evanston Residents

Evanston Public Library cards are free of charge to all Evanston residents living in zip codes 60201, 60202 and 60208. To verify residence, current government-issued photo identification with the resident's home address must be provided. A current school issued ID from an educational institution located in Evanston may be provided in place of government issued identification when necessary.

If the address on the identification is not current, one of the following items must also be shown to verify residence: current property tax bill; a current utility bill; a current title/lease/renter's agreement; current account statement from bank/credit card/phone/etc; or mail postmarked within the last 30 days to the resident's home address. An account statement or bill must be not more than sixty days old.

At the time of registration for a library card, the applicant will provide the following information: legal name, street address (PO Boxes are not acceptable), and signature. Applicants may choose to include date of birth, as well as demographic information related to race/ethnicity and language spoken at home. Additionally, to receive some notifications, a telephone number, email address, and wireless carrier information may need to be provided.

Children under the age of 14 must be accompanied by a parent or legal guardian, who must present photo identification as described above.

Library cards issued to Evanston residents will not expire so long as the patron maintains residency in Evanston. Patrons may need to provide current photo identification as listed above when moving residences if the Library is unable to verify their Evanston residency.

### 1.2 Residents of Temporary Housing in Evanston

Clients of temporary housing in Evanston must present valid picture identification as listed in 7.1.1 and a letter from the local organization indicating they are a client.

These cards will be valid for three years.

### 1.3 University and College Students

College and university students who do not have a permanent residence in Evanston must provide both their temporary Evanston residency and permanent residency when not at school.

These cards will be valid for one year.

### 1.4 Library Card Terms

Each library cardholder must safeguard their own library card. Lost or stolen cards must be reported immediately to the Library to prevent unauthorized use. A patron may grant permission to other individuals who may use their library card for checking out materials or managing activity of the account. Cardholders are responsible for all materials checked out on their library cards.

## 2. Types of Library Cards & Accounts

### 2.1 City of Evanston Employee Cards

An Evanston library card may be issued to each non-resident employee of the City of Evanston. This card will become void when the employee no longer works for the City of Evanston. This card is only valid at Evanston Public Library Branches.

## 2.2 Non-Resident Taxpayers

Library cards are available without charge to people who pay Evanston property taxes, but do not live within the City limits including; an individual or as a partner, principal stockholder, or other joint owner owns taxable property or is a senior administrative officer of a firm, business, or other corporation owning taxable property in Evanston. Only one card will be issued for each parcel of property. Applicants should present their current tax bill and acceptable identification as described above.

Such cards are valid for one year and may only be used at the Evanston Public Library.

## 2.3 Business Borrowing Privileges

Library borrowing privileges may be extended to businesses located in Evanston. The applicant must be the sole owner, a partner, principal stock holder, joint owner, or senior administrative officer of a firm, business, or corporation located in Evanston. The applicant must present a letter on the organization's letterhead indicating that the organization will take responsibility for all materials borrowed and indicating who in the firm is authorized to borrow materials.

Such cards are valid for one year and may only be used at the Evanston Public Library.

## 2.4 Organizational Borrowing Privileges

Not-for-profit organizations and units of local government located in Evanston may obtain library-borrowing privileges by presenting a letter on organizational letterhead indicating that the organization will take responsibility for all materials borrowed and indicating who in the organization is authorized to borrow materials.

Such cards are valid for one year and may only be used at the Evanston Public Library.

## 2.5 School Borrowing Privileges

Library borrowing privileges may be extended to District 65 schools, Evanston Township High School and other schools located in Evanston. To receive a school card, the school principal shall complete an application form, attach a list of teachers and/or staff eligible to use the card and return the form to the Library. These cards are only valid for use at the Evanston Public Library. The school card will expire at the end of the school year.

## 2.6 Non-Resident "Fee" Cards

Non-residents may purchase a library card for use at the Evanston Public Library if such non-residents are eligible for an Evanston Public Library card under the current State of Illinois rules and regulations governing the issuing of such cards. The minimum fee for such a card is determined by a formula prepared by the Illinois State Library. The Library Director calculates said fee annually and reports it to the Library Board at the April

meeting. When necessary the Library Board will adjust the non-resident fee to equal or exceed the fee determined by the Illinois State Library formula.

The applicant for a non-resident card must meet the same identification requirements as a resident of Evanston. Such cards may only be valid for one year and may only be used at the Evanston Public Library.

### 2.7 Registration of Reciprocal Borrowers

The Evanston Public Library will register for use any currently valid library card from a Reaching Across Illinois Library System (RAILS) library or from any library having reciprocal borrowing agreements with RAILS or with the Evanston Public Library. In addition to presenting a currently valid library card, the applicant must also present valid photo identification.

## 3. Account Suspensions, Denials and Appeals

### 3.1 Library Card Account Suspension

The Evanston Public Library reserves the right to suspend the Library card account for violation of library rules or in other instances determined by the Library's Administration.

### 3.2 Appeals

Anyone who believes that they have been unfairly suspended or denied a library card and is not satisfied by the decision made by the Library Director or designee, may appeal to the Library Board. Notice of an appeal should be made in writing to the Library Director, who will inform the appellant of the date of the meeting at which the appeal will be heard.

## 4. Fees and Issues with Library Materials

### 4.1 Borrowers with Overdue Items or Bills

The Library notifies patrons by email or phone call prior to an item's due date and notifies patrons by email or phone call when items are overdue. These notices are sent as a courtesy to patrons and bills or fees accrued are due to the Library whether or not the patron sees or receives any notice. It is each patron's responsibility to return items before or when due.

Bills or Fees may be waived by the Access Services Manager or designee when, in their judgment, there are mitigating circumstances. It is the goal of the Library to assist patrons in maintaining valid accounts so cardholders have access to all services.

Patrons are not permitted to check out physical library materials or renew their library account when they have long-overdue materials, owe bills or fees that total \$30.00 or more. Library materials are considered lost when they are 45 days overdue. Patrons are expected to pay for the replacement of lost materials. An additional processing fee is also charged for lost materials. Refunds are made if lost materials are returned in good condition to the Library within 30 days after items are billed. The processing fee is not refundable.

The Library makes use of a collection service to obtain the return of or payment for billed library materials. Accounts will be sent to collections if the total amount billed is over \$100 and an additional \$10 collection service fee will be applied.

When informed that a patron has overdue books or owes fines at another library, the Evanston Public Library may deny borrowing privileges until those materials are returned or the debt is paid.

#### 4.2 Borrowers with Damaged or Missing Materials

There is no charge for normal wear and tear on any item. If an item is damaged by a patron so that further circulation is impossible, the patron is charged the full replacement price of the item plus a processing fee. The Access Services Manager or their designee determines the charge for damage that can be repaired. Patrons may replace lost or damaged books owned by the Evanston Public Library with a new book that is an exact ISBN match. Replacement items must be new and not used or marked. Otherwise patrons are to pay the specified replacement fee. In either case, a processing fee is assessed.

The Evanston Public Library does not accept replacements for non-print material.

Damage to material is assumed to be accidental unless there is reason to suspect otherwise. Patrons found defacing or destroying library materials are required to pay for the items plus a processing fee. Suspension of Library privileges and legal action may be taken if the damage is extensive.

## 5. Confidentiality

It is the policy of the Board of Trustees of the Evanston Public Library to ensure the privacy of the users of its services and considers any patron-identifiable library records to be confidential in nature. Patron-identifiable library records are collected only when they are necessary for the fulfillment of the Library's mission or for the purpose of protecting public property and are not to be used directly or indirectly to identify the types of materials used by individual library patrons. Patron-identifiable library records include any information that links a patron to use of particular library materials, resources, or services, or that identify a patron's choices, tastes, or research interests. Such records

include, but are not limited to, all types of registration and circulation records, inter-library loan requests and records, patron requests to reserve, or obtain certain materials, staff notes pertaining to patron requests for assistance, and all correspondence with patrons having to do with use of library resources including email and social media. Even records that do not include a patron's name, but refer to some other identifiable characteristic, such as the patron's library card number, address, date of birth, race/ethnicity, language spoken at home, or phone number are considered patron-identifiable library records. In addition to physically extant records, patron-identifiable library records include computers, computer components, and other electronic storage media containing such records.

Patron-identifiable information does not include statistical records relating to use of the Library or its materials and services that cannot be used to identify particular patrons or information concerning behavioral issues in the Library's records concerning particular patrons.

No identifiable library records shall be made available to members of the public, the press, or any agency of state, federal, or local government, except pursuant to such process, order, or subpoena as may be authorized by a court under the authority of and pursuant to federal, state or local law relating to civil, criminal, or administrative discovery procedures or legislative investigatory power. Any costs incurred by the Library in any search through patron records, even under court order, shall be chargeable to the agency demanding such search. Only the Library Executive Director and designee are authorized to accept and respond to such court orders. If the order requires immediate compliance, the designated librarian-in-charge, may respond to such an order, but should first attempt to notify the Library Executive Director or designee. Whenever possible the Library's staff should seek to have the court order reviewed by the City Attorney or his/her designee before complying.

Patron-identifiable information may be disclosed without a court order only in the following circumstances:

- \* A patron may have access to any patron-identifiable records the Library holds about them, if the patron presents their library card or valid photo identification. Telephone callers who provide their library card number will be treated the same as in-person visitors.
- \* If the patron is a minor, the minor's parent or legal guardian may have access to the circulation records of that child if the parent or guardian is in possession of the child's library card and is able to provide appropriate identification for themselves.
- \* When contacting a patron, patron-identifiable information (such as the title or subject of a requested item available to be picked up) may not be left on an answering machine, voice mail, or email to the patron, unless the patron specifically requests this form of



identification at the time of the request. The Library cannot be responsible for maintaining confidentiality in the notification process if these methods are selected by the patron.

\* The Federal Protection of Children from Sexual Predators Act requires the Library to report possible violations of child pornography laws to the Cyber Tip Line at the National Center for Missing and Exploited Children ([www.cybertipline.com](http://www.cybertipline.com)). Reports received by the Cyber Tip Line are forwarded to the appropriate law enforcement agencies. Such disclosures should be made only by the Library Director or designee, and whenever possible they will consult with the City Attorney before making such a disclosure. The Library is protected from liability for good faith disclosure to the Cyber Tip Line.

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## Gift Acceptance/Donor Agreements

### Gift Acceptance

The Evanston Public Library (“the Library”) is a unit of local government and as such, encourages the proposal and acceptance of tax-deductible contributions to the Library for the purposes of furthering the Library’s mission. This policy is set forth: (a) to inform the Library’s donors and prospective donors; (b) to spell out hereinafter the working rules for the acceptance of gifts and pledges; and (c) to protect the Library, its Board of Trustees (the Board), staff and volunteers from inappropriate or undesirable gifts and pledges.

### 1. General Procedures and Guidelines

The Library welcomes expressions of interest and financial support, regardless of size or form, from any individual, family, business, corporation, foundation, or similar source.

The Library accepts both restricted as well as unrestricted gifts providing that donor restrictions do not significantly diminish the gift’s value to the Library.

Development Staff are available to meet with any prospective donor(s) and their financial advisors, without obligation, to discuss areas of interest, the plans of the Library, types of gift commitments, and options for payment. The Executive Director or designee will have authority to sign all giving agreements on behalf of the Library. Any agreement that does not meet the requirements of the current guidelines requires the approval of the Board.

Gifts to the Library should be made in the name of Evanston Public Library. All gifts to the Library should be directed to and received by the Office of Development where they will be accepted, acknowledged and administered in accordance with the policies of the Library.

No proposal of donations or gifts of funds or real property for the benefit of the Library may be made by anyone without the approval of the Director of Development or their designee.

Donors will be notified by the Library if they receive any benefits in exchange for the gift that will impact the value of the gift.

## 1.1 Definition of Acceptable Gift Types and Forms

A gift is generally defined as an irrevocable voluntary transfer of assets from a person or an organization to the Library. Gifts are usually in the form of, but are not limited to, cash, securities, real estate, or personal property. Commitments to the Library and/or payment of same may take the form of one, or a combination, of the following:

- Cash and other outright contributions
- Pledges for current year and multi-year commitments
- Securities or other personal assets
- Deferred or planned gifts including:
  - Trusts
  - Annuities
  - Insurance policies
- Gifts of real estate such as gift of residence with or without a retained life interest
- Bequest intentions

The Library reserves the right to accept or decline any commitment that is offered.

## 2. Pledges

Major and/or multi-year pledges are made in writing and commit to a specific dollar amount that will be paid according to a fixed time schedule.

## 3. Planned Giving

The Executive Director or designee has authority to sign planned giving agreements on behalf of the Library. Any agreement that does not meet the requirements of the current guidelines requires the approval of the Board.

The Library will use the accepted IRS policies for determining the value of planned gifts.

## 4. Matching Gifts

Individuals making gifts and pledges that are eligible for matching gifts are encouraged to utilize these programs to maximize the value of their gift or pledge to the Library. A donor whose gift is matched by their company will be recognized for the total amount of their individual gift plus the matching portion on their gift record. The Library will recognize an individual donor for the matching gift associated with their personal gift at the time the matching gift form is received by the Library.

## 5. Gift Reporting

All gifts and pledges will be reported to internal and external constituencies of the Library on an on-going basis according to the gift acceptance and recognition policies of the Library.

The total of outright gifts and written pledges received will be reported at face value according to generally accepted accounting principles. A signed pledge card or letter of intent must be filed with the Director of Development before a pledge commitment is reflected on reports. Verbal pledges will not be reported for financial purposes or in reporting fundraising efforts.

The value of any canceled or unfulfilled pledges will be subtracted from totals after two years of non-response to pledge reminders.

Gifts will be valued on the date the donor(s) relinquish the control of the assets in favor of the Library.

In cases where gifts are made with assets other than cash, the decision on when to liquidate, report, credit and recognize these assets will be made on a case-by-case basis by the Executive Director or designee.

## 6. Publicly-traded Securities

Gifts of publicly-traded securities will be reported, credited, and recognized at the average of the high and low market value on the day electronic transfer is received by the Library. Such securities will be conveyed to the Library for sale, consistent with the established policies of the Library.

## 7. Closely Held Stock

Gifts of closely held stock exceeding \$10,000 in value are reported at the fair market value placed on them by a qualified independent appraiser. Gifts of closely held stock valued at \$10,000 or less will be acknowledged at the per-share cash purchase price of the most recent transaction. Normally, this will be the buy-back transaction of the donor.

If no buy-back is consummated, a gift of closely held stock may be credited at the value determined by a qualified independent appraiser. Appraisals will be at the expense of the donor. All such gifts of closely-held stock will be held until liquidated, at which time the funds will be used consistent with the gift intentions of the donor and the established policies of the Library.

## 8. Real Estate

Outright gifts of real estate will be credited, recognized, and/or commemorated at fair market value at the time it is transferred to the Library, less any encumbrances.

## 9. Tangible Personal Property

Outright gifts of tangible personal property for which donors qualify for a charitable gift deduction under current IRS rules will be credited, recognized, and/or commemorated at the appraised value of the property at the time it is transferred to the Library, less any encumbrances, so long as the property has been held by the donor for more than one year. If the donor has held the property for less than one year it will be reported, credited, and recognized at the level of the original cost basis. Appraisals will be at the expense of the donor. Gifts of personal property (jewelry, paintings, antiques, rare books, etc.) exceeding \$5,000 in value will be reported at the fair market value placed on them by an independent, expert appraiser at the time the donor relinquishes control in favor of the Library. Appraisals will be at the expense of the donor. Gifts of \$5,000 and under may be reported at the value declared by the donor or a qualified expert.

The Library's acceptance of such gifts cannot involve significant additional expense for their present or future use, display, maintenance, or administration. Unless otherwise authorized by the Board, the Library will seek to liquidate such assets.

The Library will not accept gifts of tangible personal property (such as books, paintings, etc.) if such gifts are to be made on the condition, understanding, or expectation that the gifted items will be loaned to the donor or to persons designated by the donor for life or for an extended period of time as determined by the donor.

## 10. In-kind Gifts

Gifts of materials, products or services, will be accepted when the form of the gift is immediately available and is either directly usable for the mission of the Library or can be used in direct support of an official Library service. Donated services must either create or enhance the non-financial assets of the Library or require skills that would typically need to be purchased if not provided by donation. It is the sole responsibility of the donor to determine the value of the gift for their tax purposes. The Library will count the gift the same as cash at the fair-market value which will be determined in

consultation with the donor. The same rules for tax deductibility that apply for gifts of tangible personal property apply to gifts in-kind of materials, products or services.

## 11. Insurance

Fully paid up, or otherwise vested, insurance policies for which the Library is owner and sole beneficiary will be credited and recorded as future expectancies of the Library at the unrealized death benefit (face value) of the policy in cases when the insured is age 65 or greater and at the replacement value for donors younger than 65 or discounted per schedule of actuarial life expectancy at the time of the donation.

Gifts of whole life insurance to the Library will be made by either designating the Library as the beneficiary of the policy or as both owner and beneficiary. When the gift is irrevocable because the Library is the owner and beneficiary, the donor will receive gift credit for the cash surrender value as well as the discounted present value of the unrealized death benefit minus the cash surrender value at the time the policy is transferred. As payments are made to the Library for the policy premiums, they will also be credited to the donor. The Library will report the cash value of the policy as gift income at the time the policy is transferred. The Library will report payments made by the donor for policy premiums as gift income at the time they are received.

Where the Library is named as the beneficiary, but the gift is revocable because the donor still owns the policy, premium payments made directly to the insurance company will be credited and recognized to the donor if the donor sends evidence to the Library of the payment of the policy. The gift will be tracked internally as a revocable bequest. No gift income will be reported.

Gifts of term life insurance will be tracked internally as revocable bequests, however no gift income will be reported, credited, or recognized unless the policy is executed. Because of the time limits on this type of insurance policy, no donor credit will be given unless the policy is executed.

## 12. Bequests

Bequest intentions, commitments of unpaid insurance policies, and other revocable deferred gifts will be recorded as future expectancies of the Library at the value established in writing by the donor through a bequest intention form, a deferred pledge agreement, a contract to make a will, a letter, or a copy of appropriate sections of the will or of the insurance or trust document, or similar.

Such revocable gift commitments will be reported, credited, and recognized, subject to the donor's specific request and intent, only when the funds are irrevocably committed to the Library or when the gift matures.

Bequest intentions for which the donor does not indicate a specific gift value and/or does not provide an estimate of residuary bequest will be credited as future expectancies with no dollar value or payment schedule.

Bequests will be credited to campaign attainment figures as specified by the donor at the time of documentation. Such bequests will be credited, recognized and/or commemorated at the value established at the time of probate and/or at the fair market value on the date of the transfer of the asset(s). New bequest expectancies will be tracked and donors will be recognized at the face value of the bequest for stewardship purposes. Non-binding, revocable expectancies will not count toward campaign attainment figures.

### 13. Gifts Requiring the Expenditure of Funds

All gifts that will, or may, require expenditure of funds either at the time of the gift or at some future date (e.g., assets that require care, maintenance, security, etc. that may impose obligations on the Library) will require the approval of the Board.

### 14. Gift Receipt Date

For purposes of current income tax deductions such gifts will acknowledge the charitable deduction value as established by law.

The date of any contribution is defined as the date the asset(s) is irrevocably transferred to the Library. In some instances, determining that date may be difficult or impossible in the absence of relevant physical evidence. If property is personally delivered to the Library by the donor, the gift date is defined as the date of delivery of the gift. Gifts received by Library staff should be delivered to the Development Office on the date of receipt or on the next day of business following receipt. Gifts of tangible property, no matter how delivered, will be documented as received upon arrival at the Library. A gift of real estate is accepted at the time a properly executed deed to the property is delivered by the donor to the Library or the date the deed is recorded by the Office of the Recorder of Deeds (or similar office) in the country in which the property is located, whichever is first.

### 15. Named Endowment Funds

For the purposes of this policy statement, “endowment fund” refers to any fund, or any part thereof, not wholly expendable by the Library on a current basis under the terms of the applicable gift instrument. The Library endowment may be defined as a special reserve of money and/or assets that were given with some form of stipulation or restriction on the use of the earnings generated by the endowed fund. The endowment funds are invested in a manner conducive to appreciation of capital and in accordance with the Library Investment Policy established by the Investment Committee.

Endowment funds are traditionally invested for long-term growth, but must also provide sufficient income for immediate needs. Gifts to support the endowment may be used to establish a special endowment fund or may be added to an existing endowment fund. When establishing an endowed fund, an Endowed Fund Agreement is used to specify the name of the donor(s) and the amount of the gift, the name of the fund and the donor's intended purpose for the use of the earnings. This Agreement is dated and executed with the signature of the Executive Director or their designee and the donor(s) or their approved designates.

In designating an endowment gift for a specific purpose, the donor is encouraged: (a) to describe that purpose as broadly as possible and (b) to avoid detailed limitations and restrictions. In the event the specific purpose is no longer applicable, the Library will apply the funds in a manner consistent with donor intentions and the Library mission as approved by the Board. All agreements relating to endowed funds should provide a balance between the specific terms as to how the Library will administer the endowed fund and flexibility as to the future conditions which may impact the intended use of the funds.

### 15.1 Types of Endowment

Endowments have commonly been defined as either a "pure endowment," or a fund that has been invested in perpetuity restricting that the principal may never be invaded); a "quasi-endowment" which is also a fund in perpetuity, however in accordance with the donor's intentions the principal may be accessed with Board approval); and a "term endowment" involving donor and donee agreed upon restrictions of the use of principal which will lapse after a donor-designated period of time or event. Today, in accordance with accounting practices established by the Financial Accounting Standards Board of Trustees (FASB), when referring to endowment funds the following definitions are in effect: "permanently restricted," which are permanently limited by donor-imposed stipulations; "temporarily restricted," whose use by the organization is limited by donor imposed requirements that may expire within an established period of time or can be fulfilled and/or removed by actions of the Board; and "unrestricted" funds that have neither been permanently restricted or temporarily restricted by donor-imposed stipulations.

As funds are received with the intention of designated support of the endowment, the donor agreement accompanying the funds must accurately reflect the donor's intentions and the appropriate nature of the endowed fund. The understanding and proper use of these terms is critical for accounting and fundraising purposes. Each endowment fund must be supported by such documentation.

## 15.2 Minimum to Establish a Named Endowed Fund of the Library

Gifts to establish a named endowment fund for specific purposes must meet the minimum dollar requirement as established in the Library's Donor Recognition Policy. The principal amount of the original gift need not meet the minimum dollar requirement if the donor agrees to fully fund the endowment at the minimum dollar requirement within a period of time less than five years specified by the donor and approved by the Executive Director. The minimum dollar requirement to establish a named endowed fund from this date forward is \$50,000.

The Library reserves the right to review the minimum amounts required for named endowments periodically and to amend the minimum amount required so as to ensure that endowment proceeds are sufficient to fund the intended purpose(s) of the endowment. When the Library acts to increase the minimum amount required to establish a particular named endowment fund, such action will not be retroactive to funds already established and named.

## 16. Donor Responsibilities

Although representatives of the Library will provide all appropriate assistance, the final responsibility regarding asset evaluations, tax deductibility, and/or similar federal, state, and/or local legal compliance issues rests with the donor(s) and/or with such advisors as the donor(s) secure. The Library recommends that all donors consult with their legal tax counsel when planning all gifts, especially non-cash gifts or future planned gifts.

## 17. Policy Amendment and Review

The current policy was approved by the Library Directors and its Board on March 16, 2022. An attorney or other qualified individual and the Board will review this policy no less frequently than every five years in order to ensure accurate reflection of current laws. Any prospective gifts not covered by this policy must come before the Board for consideration.

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# Donor Recognition Policy

Donor recognition is a crucial component of fundraising. Through proper recognition, the Evanston Public Library can acknowledge financial support in a consistent and meaningful way,



steward existing donors, and cultivate new relationships. Visible and tangible recognition for gifts allows the Evanston Public Library to recognize its most generous donors and provides examples of generosity for others. The Evanston Public Library will, however, respect and abide by a donor's wish to remain anonymous.

The Library Director and his designees are responsible for all donor recognition, and for the consistent implementation of these policies.

The library administration and volunteers will use the donor recognition policy to guide recognition discussions with prospective donors.

## 1. Donor Recognition Objectives

The donor recognition policy is intended to:

- Provide appropriate, timely and donor-centered recognition of all charitable donations
- Cultivate future support among the current donor base
- Stimulate interest and support among potential donors

## 2. General Recognition Practices

Donors to Evanston Public Library will be offered the opportunity to name physical spaces, objects, programs and endowment funds. The level of gift required will be determined by the Board and specified on a menu of giving opportunities. During specific campaigns the Campaign Steering Committee may recommend a list of naming opportunities to the Board for its consideration and approval.

The period of time a donor's name will be attached to a specific space or program will be negotiated at the time the gift is made. This period may be in perpetuity, a designated number of years or the lifetime of the donor(s).

Evanston Public Library will take appropriate means to ensure that all programs and facilities are maintained at the highest standard of excellence through annual operating support, supplemented by endowment funds.

Recognition policies apply to gifts or pledges received or committed from individuals, corporations, foundations and/or selected government entities recognized as a single donor. Gifts from a group of family members may be recognized for the combined total of gifts from the individual family members. Individuals will be recognized for gifts received from corporations to match their personal contribution. This may include a gift from a privately held company owned by the individual or a family foundation.

In cases where support is received from a corporation or government agency composed of numerous individuals, recognition will be given to the corporation or government

agency rather than the numerous individuals in the organization, unless otherwise negotiated as part of the gift agreement.

Gifts received in full will be recognized for the amount received. Gifts pledged over a period of five years or less will be recognized at the full commitment amount upon receipt of appropriate gift documentation.

Gifts of stock will be valued according to Evanston Public Library's gift accounting policies. The recognition level will be determined by the Administrative Services Manager or his/her designee.

Deferred revocable gifts from which funds will be received at a future date will be recorded as future expectancies of Evanston Public Library at the value established in writing by the donor through a bequest intention form, a deferred pledge agreement, a contract to make a will, a letter, or a copy of appropriate sections of the will or of the insurance or trust document, etc. Such revocable gift commitments will be permanently commemorated, subject to the donor's specific request and intent, only when the funds are irrevocably committed to Evanston Public Library or when the gift matures.

Only gifts accepted in accordance with Evanston Public Library's gift acceptance guidelines will qualify for recognition.

Due to the unique nature of donor relationships, exceptions to the stated recognition policy may be appropriate and may be approved by the Library Board. Considerations will include the programmatic and aesthetic standards of Evanston Public Library, needs of the Library's constituencies, the financial viability of the institution and the contributions and intention of donors, past and present.

### 3. Annual Giving

Recognition will be in proportion to the value of the contribution, whether the gift is unrestricted or designated for a particular program. A donor's recognition level for annual giving will be based on the total of operating gifts, regardless of designation. Donor recognition will honor individual donor's wishes regarding confidentiality; donors requesting anonymity for specific gifts or for all their giving will be omitted from displays and publication. Grants from foundations and corporations for program support or general operating support will be recognized as gifts to the annual campaign in the fiscal year they are received

Gifts in kind will be recognized separately from monetary gifts except in instances where the fair market value of the in-kind gift is clearly established by a receipt or appraisal. In those instances, the gift will be recognized at its fair market value.

Program or Event Sponsorships will be recognized based on the sponsorship amount less the cost of sponsor benefits and will be determined on a case-by-case basis.

## 4. Physical Space Recognition

Requirements for physical recognition of gifts to Evanston Public Library will be approved by the Library Board, based on factors including, but not limited to, the prominence, size and location of spaces and facilities, gift size and pledge payment period, and donor interests. Requirements may be revised as appropriate to reflect institutional priorities and to promote philanthropic support for Evanston Public Library's fund raising programs. Exceptions will be approved on a case-by-case basis by the Library Board.

The wording on physical recognition plaques will be developed collaboratively by Evanston Public Library staff and each respective benefactor to ensure consistency and appropriateness. The Library encourages consistency in plaque wording length and plaque size. Physical recognition may memorialize or honor an individual or individuals, or other entity, as desired by a donor and approved by Evanston Public Library.

Evanston Public Library will provide physical donor recognition for contributions upon receipt of a gift or appropriate gift documentation. Gifts of the level required to name spaces, (a minimum of \$25,000) may be recognized in appropriate site-specific locations in addition to a centralized benefactor recognition display. In addition, these gifts may be recognized on Library directional signage as appropriate.

Other forms of physical recognition may be developed as deemed appropriate by the Library based on extraordinary support. In some cases, and for gifts of particular significance, recognition of a donor may be provided on Evanston Public Library signage beyond a site-specific plaque. Named spaces may be offered only if the facility funded is exclusive in nature and does not create confusion on the part of staff and visitors. Recognition on signage may not apply if the naming detracts from the stated purpose of the facility.

Gifts from donors toward facilities may be recognized through plaques placed in appropriate site-specific locations. For example, the Jane Smith Reference Desk or the Reference Desk – funded by a generous gift from Jane Smith.

## 5. Program Recognition

Benefactors of gifts to name programs or initiatives at the minimum gift level established for physical recognition may receive recognition in the physical space of the Library and/or in the annual report.

## 6. Endowment Recognition

Benefactors of endowment gifts may be recognized through the establishment of named funds if the fund will maintain the minimum qualifying gift value (\$50,000) for a period of five years or more.

Gifts of less than \$50,000 to endowment will be placed in the unrestricted endowment account. Donors will be recognized at the level appropriate with their gift.

## 7. Renaming Procedures

When it is necessary for Evanston Public Library to renovate, enhance or relocate a space or program that has previously been named, Evanston Public Library will give the donor(s):

- The right of first refusal to make an additional gift to Evanston Public Library to name the new space or program (the amount requested for the new gift being the naming "price" for the new project less the value of the original gift); OR
- The opportunity to name another space at Evanston Public Library comparably priced at the value of the original gift; OR the opportunity to have the original gift recognized on a plaque within or near the location of their original named space.

If Evanston Public Library is unable to contact the donors or their heirs after reasonable attempts, the Board of Trustees or its duly designated committee and the Library Director of Evanston Public Library, in consultation with the Administrative Services Manager, will determine the most appropriate means of recognizing the original gift. Evanston Public Library retains the right to seek additional donors in cases where further support from the original donor is not possible, and associate the name(s) of the new donor to the renovated facility along with the name of the original donors.

## 8. Donor Recognition Boards

Donor recognition boards or other recognition vehicles will be created for Lifetime Giving, Annual Giving and Campaign Giving and will be placed in a centralized location to maximize impact and visibility. Individual, corporate, foundation, government and other benefactors will be recognized on the donor recognition boards according to the level of their respective support.

## 9. Publications

Evanston Public Library may publish additional donor lists or rosters as deemed appropriate.

Other publications, such as newsletters and brochures, may provide additional opportunities for donor recognition. When appropriate, donors may be recognized in publications that feature information on facilities or endowments they have supported.

All anonymous donors will be collectively listed as anonymous under their specific levels and areas of support.

## 10. Other Recognition

For gifts of particular significance, recognition in publications and media such as newspaper, magazines, television, etc. may be actively sought on behalf of Evanston Public Library and the donor with the permission of the donor. Both Evanston Public Library's administration and the donor will approve press releases for gifts.

Evanston Public Library may organize and conduct recognition events to honor donors whose support of Evanston Public Library is deemed extraordinary by the Library's Board of Trustees.

## 11. Awards and Gifts

Commemorative objects of minimum value may be distributed to donors and volunteers to reflect appreciation for their support.

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## Internet Access

Internet access is available on public computers for all users of the Evanston Public Library and through wifi access at Evanston Public Library Locations. The Library cannot insure the privacy of individuals who use the Internet to conduct business or for personal correspondence. The Internet allows users to connect to networks of resources outside the Library. The Evanston Public Library has no control over these resources nor does the Library have complete knowledge of what is on the Internet. The Library does not select or edit Internet content, or take responsibility for its reliability, currency, or accuracy. Library patrons use the Internet at their own discretion. The Internet contains some material that is inappropriate for viewing or reading by children, such as sexually explicit, violent, and racist material and images. For this reason, adults are encouraged to monitor and supervise their children's use of the Internet. The Library staff does not limit or restrict adults or children in the Internet sites they choose to view.

The Evanston Public Library is bound by an agreement with its Internet provider that prohibits any unlawful use of the Internet. The Internet and/or wi-fi connection shall not be used for illegal purposes nor used in such a way as to violate Evanston Public Library policies. Patrons who make unlawful use of the Internet may be barred from using the Library's Internet resources.