



# G.O.A.L.

Gateway to Organizational Achievement & Learning

## Employee Orientation

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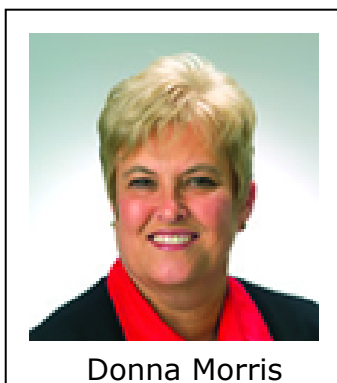
***Outstanding Service Award Brochure***

***Shelflife***

***Your Inviting, Innovative Link to the World – Strategic Plan Brochure***

## Message from MLS's Executive Director

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Donna Morris

Welcome to the Metropolitan Library System and the **G.O.A.L.** program! Achieving our desired outcomes, while providing responsive public library programs, materials, and services to our customers, requires a highly skilled and knowledgeable team of employees.

**G.O.A.L.** is the foundational training course geared at providing employees with the tools and competencies to support and promote the organization's Mission, Vision, and Values. In addition, **G.O.A.L.** reflects our commitment to investment in our workforce and the high regard the Metropolitan Library System has for all its employees.

The learning opportunities provided by Metro University enable each of us to work effectively as a unified team, in pursuit of the common goal of enhancing library service to all people in the Oklahoma County area. I encourage you to accept the challenge of increasing your knowledge base by participating in upcoming course offerings and applying this newly learned information immediately to your employment role. Your active participation will ensure both personal growth and the continued effectiveness of the Metropolitan Library System to our Oklahoma County stakeholders.

I'm glad you have chosen to join *our* team and I look forward to watching you grow and flourish in our library system.

Sincerely,

A handwritten signature in dark ink that reads "Donna Morris". The script is fluid and cursive.

Donna Morris, MLS  
Executive Director  
Metropolitan Library System

# Welcome from Employee Development Coordinator

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The Metropolitan Library System's **G.O.A.L.** New Employee Orientation Program was designed to provide the tools and competencies necessary for all employees to face the daily challenges and further the organization's mission of facilitating the free-flow of information and ideas by providing access to materials, services, and programs to Oklahoma County's diverse population.



The program offers employees an introduction to a broad set of skills through a series of exercises relevant to their employment role. Additional courses offerings will be identified where employees can choose to participate to meet their needs as well as the organization's needs. Whenever possible, all session materials have been adapted to reflect our vision of being Oklahoma County's premier information, education, and entertainment resource.

It is Metro University's goal to provide interesting and relevant learning experiences within an interactive, fast-paced environment. Sessions are designed to support both personal and professional growth and development while emphasizing our team-based approach to problem solving.

I look forward to your participation and continued efforts in setting the standard for excellence and making our library's mission a reality!

Cheers,

A handwritten signature in blue ink that reads "Stacy Schrank". The signature is fluid and cursive.

Stacy G. Schrank, M.Ed.  
Employee Development  
Coordinator

*T*his handbook provides a broad introduction into the policies and procedures relating to work at the Metropolitan Library System (MLS). Policies and procedures are divided into several main categories with various subcategories under each. These categories include:

- **Access**
  - AL – Access to Libraries
  - AM – Access to Materials
  - AS – Access to Services
- **Stewardship**
  - SF – Stewardship of Financial Resources
  - SH – Stewardship of Human Resources
- **Values**
  - VF – Fundamental Values
  - VG – Guiding Values
  - VH – Historical Values
- **Miscellaneous Information**

New employees of the MLS will find this handbook a useful introduction to the way the organization works, and veteran employees will find it a handy reference for answering many questions about MLS employment. The handbook also includes guidelines for job performance and behavior

In summarizing the terms and conditions of employment at MLS, this handbook *does not* provide a detailed description of all employment policies and practices. From time to time, policies and programs of the MLS may change. To be sure of having current information, each employee is responsible for conferring with his/her supervisor for the latest MLS Policies and Procedures, or contact the Human Resource Department located at the Ronald J. Norick Downtown Library, 300 Park Ave., Oklahoma City, OK 73102 at 405-606-3739. The current MLS Policies and Procedures can also be accessed through the MLS Intranet via:

[http://morris/GotInfo/policy\\_procedures/revised\\_toc\\_v2.htm](http://morris/GotInfo/policy_procedures/revised_toc_v2.htm).

This **G.O.A.L.** Employee Handbook contains the policy information ordinarily needed by library system employees, however, more extensive information on some matters may need to be located through other publications or human resource contact.

This handbook is neither an employment contract nor an assurance of continued employment. The Metropolitan Library System may change without notice any statement in this handbook concerning rules, policies, procedures, benefits, or other matters. Accordingly, employees should check the most current information if there is any doubt about the application of the policy.



The Metropolitan Library System contains a staff of approximately 400 who conduct the operations of the largest public library system in the state of Oklahoma. The following categories outline the general administration and operation of the Metropolitan Library System:

### Commission

The Metropolitan Library System operates under the supervision of the Metropolitan Library Commission. This 20-member board of dedicated library advocates approve the policies that guide the Metropolitan Library System and determine its future. Each member of the Commission is appointed by the mayor of his/her resident city within Oklahoma County. Additional Commission members serve based on virtue of his/her political office appointment. A complete listing of the current Metropolitan Library Commission members can be located on the Internet by visiting:

<http://www.metrolibrary.org/Commission/librarycommission.htm>

The Commission hires and supervises the main administrator of the library system – the Executive Director. In November of 2004, current executive director, Donna Morris, announced the re-organization of the deputy director positions within the system. This process was driven by the need for the executive director to focus more time on setting and planning long-range goals, building community partnerships, and improving communication within the organization by developing better lines of communication. The reorganization also supports the library's mission of *facilitating the free flow of information and ideas by providing access to materials, services, and programs to Oklahoma County's diverse community*. These four deputy executive director positions assumed their duties on November 22, 2004 and are defined as follows:

### **Finance & Support**

Oversees the departments of:

- **Finance** – Responsible for: Managing the Library System's financial activities including accounting, purchasing, budgeting & investing, inventory, and payroll.
- **Human Resources** – Responsible for: Planning, coordinating, and directing the Library's Human Resource functions including recruitment, selection, out-placement, benefits, compensation, classification, job analysis, performance appraisals, discipline, and grievance processing.



- **Development & Volunteer Services** – Works with a large public of both individual volunteers and cooperate fundraisers and donors in accomplishing Library goals, projects, and fundraising.
- **Construction Management** – Develops and participates in library facility renovation, additions, or new construction projects for the Library System from start to finish through initiation, selection of design professionals, design phases, contract review, and construction.
- **Facilities Maintenance** – Manages the Library System’s facilities and fleet, directs the maintenance and improvement of buildings, grounds, vehicles, and equipment.

## **Library Operations**

Oversees the departments of:

- **Planning & Training Services** – Responsible for the short and long-range plan development for the library system along with the coordinating the availability of continuing education and learning courses for all System staff.
- **Branch Services** – Responsible for the general operation in all system library agencies.
- **Marketing & Communications** – Develops public relations strategies, publicity, and promotions designed to enhance the library system’s image within the community and increase public awareness of library programs and services.

## **Materials & Outreach**

Oversees the departments of:

- **Materials Services** – Develops and manages the materials collection for the Library System including the selection, ordering, cataloging, processing, management, and de-selection of materials.
- **Outreach, Children’s Services, & Services to Seniors** – Plans, implements, and evaluates services to children and youth, seniors, and other special service need customers in system libraries and communities.

## **Technology**

Oversees the departments of:

- **Automation/Information Technology** – Responsible for: Availability and delivery of computing, telecommunications, and information technologies throughout the organization.

Occupational categories represented under each of these administrative team members include jobs in library service, maintenance, support, technology, professional, and administrative areas. These job categories are common within the public, private, and academic fields of library operations.

## **Staff**

Each category includes numerous job classifications and titles. Staff classifications are divided into two general categories, exempt and nonexempt staff. A description of each category is as follows:

- Exempt staff — consists of employees whose responsibilities are primarily executive, managerial, or administrative, or whose positions require an advanced educational degree or knowledge and experience in a field considered professional. These positions are exempt from overtime requirements of the Fair Labor Standards Act (FLSA) that mandates overtime pay for time worked in excess of 40 hours per week.
- Nonexempt staff — consists of employees holding positions in support activities of the library system. Employees in these jobs are not exempt from the FLSA overtime provisions and they are paid 1½ times their regular pay rate for hours worked in excess of 40 in a week. An organizational chart is included later in this handbook or can be viewed online at:

[http://morris/GotInfo/policy\\_procedures/section\\_v/item\\_vg/subsection\\_vg-200/vg200\\_organizationalchart\\_2006.pdf](http://morris/GotInfo/policy_procedures/section_v/item_vg/subsection_vg-200/vg200_organizationalchart_2006.pdf)

## MLS Jargon List

Library Jargon	Definition
<b>-A-</b>	
ANF	Adult Non-fiction
AUT	Automation
AVL	Annual Vacation Leave
<b>-B-</b>	
BBM	Books-by-mail
BC	Book Centers
BE	Bethany Library
BHC	Black Heritage Collection (Ralph Ellison)
BI	Belle Isle Library
BKR	Backroom Storage
BPR	Brach Prof. Reference
BUS	Business Office/Purchasing
<b>-C-</b>	
CAT	Cataloging
CC	Circulation Control
CEN	Census (Downtown)
CH	Capitol Hill Library
CT	Choctaw Library
<b>-D-</b>	
DC	Del City Library
DVS	Development/Volunteer Services
DIR	Executive Director's Office
DN	Downtown Library
<b>-E-</b>	
E	Easy
ED	Edmond Library
EOB	Explanation of Benefits (Insurance company statement showing what has been paid and what you will need to pay)
<b>-F-</b>	
F	Fiction
FR	France Room (Oklahoma Collection, Downtown)
FRN	Foreign Language (Capitol Hill, Downtown)
<b>-G-</b>	
GEN	Genealogy (Ralph Ellison)

Library Jargon	Definition
<b>-H-</b>	
HR	Harrah Library
HUM	Human Resources Office
<b>-I-</b>	
ILL	Inter-Library Loan
ILS	Integrated Library System
I-R	Interagency Reference
IT	Information Technology
<b>-J-</b>	
JAW	Juvenile Award Books
JF	Juvenile Fiction
JMY	Juvenile Mystery
JN	Jones Library
JNB	Juvenile New Books
JNF	Juvenile Non-Fiction
JOB	Career Guidance
JSC	Juvenile Special Collection (Midwest City)
JSF	Juvenile Science Fiction
JSP	Juvenile Sports
JSS	Juvenile Short Story
<b>-L-</b>	
LO	Library Operations
LP	Large Print
LSC	Learning Skills Collection
LU	Luther Library
<b>-M-</b>	
M	Music
MAC	Marketing and Communications
MWC	Midwest City Library
MLS	Metropolitan Library System
MSL	Materials Selection Office
MTC	Maintenance
MYS	Mystery
<b>-N-</b>	
NBK	New Books
NP	Nicoma Park Library
NW	Northwest Library
<b>-O-</b>	
OIR	Oversize Interagency Reference
OUT	Outreach
OVR	Oversize Reference
OVZ	Oversize

Library Jargon	Definition
<b>-P-</b>	
PLA	Planning & Library Relations (including Training)
PUB	Public Services Office
<b>-R-</b>	
R	Reader
RE	Ralph Ellison Library
REF	Reference Adult Non-Fiction
RFP	Request for Purchases
<b>-S-</b>	
SC	Special Collection (Downtown)
SEA	Seasonal Storage
SEQ	Sequoyah
SF	Science Fiction
SIR	Stacks Interagency Reference (Downtown)
SO	Southern Oaks Library
SOV	Stacks Oversize (Downtown)
SRS	System Reserves Shelf
SS	Short Story
STK	Stacks (Second Floor, Downtown)
SY	System
<b>-T-</b>	
T	Tween Fiction
TEMP LOAN	To Loan for one day – Hold for someone with name, not library card number
TNF	Tween Non-Fiction
TP	Technical Processing
TVP	TV Programming
<b>-V-</b>	
VI	Village Library
<b>-W-</b>	
W	Western
WA	Warr Acres Library
WR	Wright Library
<b>-Y-</b>	
YA	Youth Adult

# **Access to Libraries**

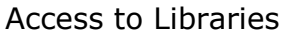
## **AL 100 Service Area**

*Revised: 12/99*

### **Policy**

The Metropolitan Library System serves the entire Oklahoma County area plus all areas within the official Oklahoma City limits. The boundaries generally run as follows:

- A. Eastern Oklahoma County border: Pottawatomie Road
- B. Northern Oklahoma County border: 248th Street on the north to County Line on the West
- C. Northern Oklahoma City limits: South to NW 164th, west to Mustang Road, dipping to N. 150th, to east of Cemetery Road, back north to approximately N. 155th and on west to Richland Street
- D. Western Oklahoma City limits, excluding Yukon and Mustang: Richland Street south to Wilshire, then east to Sara Road; south to approximately NW 39th, then west to Gregory Road; then south to the South Canadian River
- E. Southern Oklahoma City limits: South Canadian River to west of Meridian, south to SW 179th, east to south Santa Fe, then zigzagging north between Santa Fe and Western to approximately SW 97th; then east to Bryant; back south to approximately SE 110th zigzagging to Sunnyslane, south to approximately SE 156th, east approximately a mile and a half, south to SE 179th; east to Westminster, north a mile and a half, east a mile and a half; 1/2 mile north to SE 149th, east to Indian Meridian, east to Triple XXX Road, south zigzagging to Peebly Road east to Luther Road, 1/2 half mile north to SE 164th and east to Pottawatomie Road.



# AL 210 Library Cards

## AL 211 Reciprocal Cards

*Revised: 4/92, 12/99; Draft 10/04*

### Policy

The Metropolitan Library System (MLS) and the Pioneer Library System maintain a reciprocal borrower's policy. It is to remain in effect indefinitely and is subject to re-evaluation as either or both library systems deem necessary.

Each library system respects the eligibility requirements of the other in issuing reciprocal cards. MLS considers as eligible those persons who reside, work or attend school in Cleveland, McClain or Pottawatomie counties or attend school in Blanchard.

Communities in Pioneer's service area are:

#### Pottawatomie County

Asher  
Bethel Acres  
Dale  
Earlsboro  
Macomb  
Maud  
McLoud  
Pearson  
Pink  
Shawnee  
St. Louis  
Tecumseh  
Tribbey  
Wanette

#### McClain County

Blanchard  
Byars  
Cole  
Criner  
Dibble  
Goldsby  
Newcastle  
Payne  
Purcell  
Rosedale  
Washington  
Wayne

#### Cleveland County

Lexington  
Little Axe  
Moore  
Noble  
Norman  
Stella  
Slaughterville



# **AL 200 Eligibility**

## **AL 210 Library Cards**

***Adopted: 7/85, Revised: 9/86, 1/88, 4/92, 9/92, 1/93, 10/94, 7/99, 12/99, 8/00; 10/04;  
4/06***

### **Policy**

The Metropolitan Library System offers four types of library cards:

- 1) Primary cards: Includes all services offered by the Metropolitan Library System. Customers eligible for primary cards meet one or more of the following criteria:
  - a) Reside in Oklahoma County or Oklahoma City
  - b) Own real estate in Oklahoma County or Oklahoma City
  - c) Are employed by the Metropolitan Library System
- 2) Reciprocal cards: The Metropolitan Library System maintains a reciprocal service agreement with the Pioneer Library System headquartered in Norman, Oklahoma. Reciprocal service includes all services except books by mail and interlibrary loan. Customers eligible for reciprocal cards meet one of the following criteria:
  - a) Reside, work or attend school in Cleveland County, McClain County or Pottawatomie County.
  - b) Attend school in the Blanchard School District.
- 3) School-Based cards: Adults or children who do not qualify for primary or reciprocal service may be eligible for service based on the school they attend. Cards issued under this provision are valid for only one year and eligibility must be verified annually. School card service includes all MLS services except interlibrary loan. Customers eligible for school cards must attend or teach school in Oklahoma City or Oklahoma County.
- 4) Annual Fee and Cash Deposit cards: For persons who do not meet eligibility criteria listed above.
  - a) An individual may use all services offered by MLS for one year by purchasing an annual fee card. (See AM 111 Fee Schedule) The annual fee is nonrefundable. Additional cards for immediate family members, parents and children, may be obtained at no additional cost.
  - b) An individual may borrow items by making a cash deposit equal to the price of each item plus a processing fee. (See AM 111 Fee Schedule) Checks are not acceptable. The full cash deposit minus any fines incurred is refunded when the items are returned. Cash deposit service does not include interlibrary loan.



## **Conduct Expected by the Metropolitan Library System**

### **POLICY**

The Metropolitan Library System seeks to provide a safe, friendly and productive environment for library customers and staff. In the library system's endeavor to do so, it has become necessary to identify certain unacceptable behavior for the benefit of library customers, visitors, vendors, contractors and staff. Individuals engaging in unacceptable conduct will be subject to library use restrictions up to and including loss of library privileges.

### **UNACCEPTABLE BEHAVIOR**

1. Acts such as tampering with, defacing, mutilating and theft of library property
2. Acts of violence or threats of violence
3. Acts or actions that disrupt the peaceful use of the library services by other customers
4. Comments, acts or actions that involve harassment based on sex, race, color, religion, national origin or handicap including those that create a hostile environment
5. Library customers, visitors and staff have a reasonable expectation of an environment free from communicable diseases, lice or other body or article infestation. Therefore, the presence of individuals or items with these conditions is unacceptable.
6. Bathing (or shaving) in public rest rooms or fountains
7. Entering unauthorized workspaces, loading and building equipment areas
8. The blocking of aisles, elevators or traffic-ways that impedes access by others
9. Eating or drinking, except in designated areas, and use of tobacco products.
10. Any other acts or actions not otherwise listed that would be considered criminal, whether misdemeanors or felonies.

*Adopted 6/97*

# Access to Materials

## AM 100 Borrowing

**Adopted: 7/85, Revised: 9/86, 1/88, 4/92, 9/92, 1/93, 10/94, 7/99, 12/99, 8/00;  
Draft 10/04**

### 1) Requirements for Borrowing Materials

- a) To borrow materials the customer must be a registered MLS borrower without a stop order or delinquencies ("Overdue 60") against his/her record and do one of the following:
  - i) Present his/her valid MLS library card at the circulation desk
  - ii) Present his/her MLS library card number at the circulation desk plus standard identification verifying name and current address.
- b) If a customer has forgotten his/her card and does not know the number, staff should check circulation records to verify that the customer is a registered borrower without a stop order or delinquencies against his/her record. The customer must then show acceptable identification equal to that required for obtaining a library card.
- c) Customers who need to replace a lost or stolen card prior to borrowing materials must show proof of eligibility and pay a non-refundable processing fee. (See Fee Schedule for amount.)

### 2) Maximum Items Borrowed

- a) A maximum of 30 items can be on loan to one borrower at a time. If materials are in short supply at a given agency, the library manager may set a further limit.
- b) See appropriate section or attachment for numerical checkout limits on other materials and for limits on the number of ILL requests.

### 3) Loan Periods and Renewals

- a) Books, other printed materials, audiocassettes and recordings may be checked out for two weeks. They may be renewed twice to a maximum loan period of 42 days if there is no System Reserves request for the items during that period.
- b) Videos may be checked out for seven days and renewed twice to a maximum loan period of 21 days, if there is no System Reserves request for the items during that period.
- c) See appropriate section or attachment for loan periods for other materials and interlibrary loan.

**Note:** *Customers may attempt to renew materials anytime within the maximum loan period, which varies depending on the media type. There is no limit to the number of times an item may be renewed. The software permits renewals until the maximum loan period is reached, which is calculated from the original checkout date. The 2 renewals is based on the concept of an item being renewed on the due date each time.*

# **AM 110 Delinquent; Lost/Damaged**

## **AM 111 Fee Schedule**

***Adopted: 7/85; Revised: 9/86, 1/88, 4/92, 9/92, 1/93, 10/94, 7/99, 12/99, 8/00,  
(Fee schedule revised 7/99, 12/99); Draft 10/04***

### **Fee Schedule**

#### **A. Overdues**

- Cataloged items, including print materials and audio recordings -- \$.10/day to a maximum of \$3.00/item
- Video Recordings -- \$.50/day to a maximum of \$6.00/item
- Interlibrary Loan -- \$.50/day up to a maximum of the cost of the material. See Section III, Attachment B for ILL policy.

#### **B. Lost or Damaged Materials**

- Cataloged books -- Replacement price or rebind cost is automatically assessed by the ILS when the Payments/Refund function is activated.
- Paperback books -- \$3.00
- Magazines -- Replacement price is automatically assessed by the ILS when the Payments/Refund function is activated.
- Video Recordings -- Full cost of video for videos lost or damaged through neglect. Examples of neglect: leaving in hot car and warping, careless breakage, destroyed by pets or children, caught in video player that has not been maintained. No charge is made for videos that break after circulating 100 or more times. For videos that have circulated less than 100 times, the fee should be prorated by as follows: 1/4 of original price for videos that have circulated 75 to 99 times, 1/2 of original price for videos that have circulated 50 to 74 times, 3/4 of original price for videos that have circulated 25 to 49 times, full price for videos that have circulated less than 25 times.
- Audiocassettes -- Full cost of audiocassette for ones lost or damaged through neglect. (See examples for damaged videos above.) If an audiotape breaks cleanly, indicating deterioration over years or with usage, there is no charge. If part of a kit or set is lost, whether a tape or a book integral to the kit, the charge is \$7.00 per item lost.
- CDs -- Full price of CD for ones lost or damaged. Damaged means broken, warped, gouged, etc. There is no charge for CDs that have become too scratched to play through normal usage.

# **AM 110 Delinquent; Lost/Damaged**

## **AM 111 Fee Schedule**

***Adopted: 7/85; Revised: 9/86, 1/88, 4/92, 9/92, 1/93, 10/94, 7/99, 12/99, 8/00,  
(Fee schedule revised 7/99, 12/99); Draft 10/04***

- CD liners -- No charge for lost CD liner notes or guides. Staff should type a "no guide" label and place it on boxes for CDs whose liner/guide is known to be irretrievable.

### **C. Library Card Fees**

- Replacement card -- \$1.00 per replacement
- Annual Fee card -- \$40.00 per family per year
- Cash Deposit card -- Cash equal to price of each material borrowed plus a \$10.00 per item processing fee

### **D. Miscellaneous**

- Photocopies -- \$.15 per page
- Faxes -- \$.25 per page
- Microfiche Reader/printer copies -- \$.25 per page
- Public Space usage fee -- \$10.00 per hour. (See AS 500 Public Space)

# **AM 100 Borrowing**

## **AM 120 System Reserves**

*Revised: 12/99, 11/05*

A. System Reserves let eligible borrowers place requests for materials not available at a given agency, but available from another agency. This service:

- Gives customers a simple way to file requests for materials.
- Provides the requested material, or notice of inability to provide the material, within the time limit set by the requesting customer.
- Provides an efficient method for making the library system's holdings available to all eligible users.

B. Eligible borrowers may reserve up to 30 items. Eligible borrowers are:

- Primary service customers
- Reciprocal service customers
- Annual fee customers
- School-based service customers

# **AM Materials Selection**

## **AM 310.1 Individual's Comments on Library Materials**

*Revised: 11/82*

### **Procedures**

Library staff members, particularly professionals, in all library agencies are required to be familiar with the library system's Materials Selection Policy and related documents, including the Citizen's Bill of Library Rights and the Freedom to Read Statement. Library users or other citizens with questions about these selection policies or specific materials receive a personal response to their queries or concerns from the library staff. In addition, if individuals desire to present written comments regarding library materials, they are advised to use Form #647, Individual's Comments on Library Materials (attached).

The library system endeavors to provide books and other materials expressing many points of view concerning problems and issues of our times, and this policy is explained to library patrons, who are invited to suggest other materials for the library to consider adding to its collection. These suggestions are given serious consideration for purchase by the library. The library's selection criteria and related policies are used in reviewing the suggestions, and patrons are advised promptly regarding the library's decision to purchase or not to purchase the suggested materials.

The library staff should offer the user or individual a copy of Form #647, Individual's Comments on Library Materials and copies of the following policies:

- Materials Selection
- The Freedom to Read Statement
- Library Bill of Rights

The library staff should explain that use of Form #647 makes it possible for the library to understand better the individual's views on the materials and it facilitates the library's thorough consideration and response.

Library managers should send the completed form #647 to the Director of Materials Selection. The Director of Materials Selection will review the comments with the library manager and conduct the necessary re-evaluation of the material involved. The review will include a re-examination of the library system's selection criteria and policies regarding the particular material. The Director of Materials Selection and library manager will draft a response for review by the Executive Director, who will then send a written response to the individual initiating the comments.

# **Access to Services**

## **AS 100 Reference Services**

*Revised: 1/98*

### **Service Philosophy and Library Ethics**

1. Every contact with the public is an opportunity to engender positive attitudes about the library.
2. All reference and information questions will be handled with equal effort regardless of the originating source (walk in, phone, mail).
3. Oklahoma law protects the confidentiality of library users' records.

\* Reference services are also confidential. Staff are not to discuss customers, their borrowing habits or their information requests except as required in seeking assistance from other library staff to find the desired information.

4. Library staff will refrain from discussions of personal issues and opinions regarding library matters when on duty in public service areas.
5. Our intent is to comply with the system's declared policies on access to materials and information as stated in the Citizens' Bill of Library Rights and its interpretations and the Freedom to Read Statement.
6. The library system expects a high level of professional competence of all staff in providing accurate and complete responses to inquiries. Staff should be especially aware of potential legal liability for conveying inaccurate information.

\* The "Confidentiality of Library Users' Records" law is Section 1, Chapter 81, O.S.L. 1985 (65 O.S. Supp. 1985, Section 1-105). Its provisions appear on signs posted in all library public service areas. Librarians should also be familiar with Oklahoma's Open Record Act.

### **Reference Interview/Courtesy Standards**

Library staff will assist customers and other library staff in a friendly, courteous and supportive manner according to MLS Service Philosophy, Library Ethics and Reference Interview and Service Guidelines.

#### In Person:

- Maintain awareness of customer approach by watching or looking up frequently; do not appear too busy to answer questions.



# **Access to Services**

## **AS 100 Reference Services**

*Revised: 1/98*

- Acknowledge the customer by making eye contact, smiling or issuing a friendly greeting. Remain courteous at all times.
- Use basic terms and language (avoid library jargon) and ask open-ended questions.
- Give full attention to the customer.
- Listen carefully and paraphrase customer's request to ensure understanding ask clarifying questions while respecting the customer's privacy.

### By Phone:

- Answer the phone in a timely manner.
- Identify area and self.
- Give the caller a choice before putting him/her on hold.
- Promise specific action and confirm agreement for action and follow through.
- Cite sources over the telephone to the customer.
- End conversation with an appropriate courteous closing.

The following policy guidelines are not rigid rules or strict limitations. They should be interpreted and applied with professional judgment and professional conduct in serving the library's public.

## **MLS Reference Service**

Library staff will assist customers in person, by phone or by mail to locate and/or obtain materials or information. They will interpret library resources, policies and procedures for customers. They will assist and instruct customers in the use of indexes, library equipment and tools (PAC, MARS, copies, Reader/Printers and Internet). Staff will conduct searches and answer reference questions utilizing all resources available.

## **Reference Service - Standard Procedures**

All requests are of equal importance. If the telephone rings while you are helping a customer, allow the automated system to answer. Respond to the automated system message as quickly as possible. Libraries without voice mail need to establish individual procedures.

# **Access to Services**

## **AS 100 Reference Services**

*Revised: 1/98*

If a customer appears while you are engaged in a telephone conversation, acknowledge customer's presence with a nod or hand signal and end the phone conversation as quickly as possible.

Work performed at the reference desk should not become a barrier to the public; never appear too busy to be interrupted.

Walk through the agency when possible and volunteer your assistance. Be available whenever a customer needs help in locating materials or instructions in the use of tools and resources.

An attempt should be made to satisfy the information request using resources available at your library first. Do not automatically refer customers to other libraries or sources outside your library.

When desired information is not available at your agency, make appropriate referrals.

### **Reference Service - Parameter Guidelines**

1. The limit of reference service will vary. Exceptions may be made depending on how busy the agency is and the specific needs of customers. The reference staff's main functions are guidance, direction, instruction, and information delivery. The amount of time necessary to perform these functions will depend on and vary according to the following variables:
  - Customer's time limit.
  - Customer's ability to comprehend instructions.
  - Complexity of materials to be used.
  - Number of customers needing assistance.
  - Number of staff available to help customers.
  - Equipment/resources available.
2. Due to the large number of customers that need to be served, reference staff will spend no more than 15 minutes per customer without checking the reference desk status.
  - In-Library Service: If questions cannot be answered in a reasonable amount of time, supply possible sources and return periodically until customer can work

# **Access to Services**

## **AS 100 Reference Services**

*Revised: 1/98*

independently. Offer to contact the customer later to allow more time for a reference search.

- Telephone Service: Depending on the complexity of the question, the customer will be given the option of a call-back, coming to the library for assistance, or referral to another agency.

### **3. Processing a reference request:**

- Accept three reference questions per customer. (I.e. book title, stock quotes, phone numbers, reserves placed, etc.)
- Cite the source for all information given.
- Complete callbacks the same day if possible.
- Make only collect calls for long-distance callbacks.
- Maintain customer privacy by providing only library name and telephone number when leaving messages for customers.
- Limit photocopy requests by telephone to 3 articles or 6 pages per customer. Advise customer of the copy fee schedule and time frame for delivery.

## **Reference Service - Special Approaches**

When providing the following information, the librarian may read the information and indicate the source, but the customer must interpret the information. The librarian may indicate to a customer that he/she does not have the specialized knowledge to give absolute answers and advise the customer to examine the material.

Current criss-cross and city directory: Customers need to visit the library for current city directory and criss-cross requests. Older editions (1905 to 1997-not complete set, check for specific years) are located at the Downtown Library.

School assignments: Students at all levels should receive the same service as anyone else according to the general guidelines for service.

Contest questions: Simple, factual questions are answered over the telephone. Otherwise, the customer should be invited to come to the library to use the necessary source material.

Consumer information: Be careful about giving answers to consumer questions. Customers asking for product ratings in such sources as Consumer Reports may be given

# **Access to Services**

## **AS 100 Reference Services**

*Revised: 1/98*

the brand names and model numbers of products rates. If a customer asks for information on a specific product, the evaluation may be read. Customers should be encouraged to read the entire article. Such limitations as the date and context of the rating should be pointed out. Personal opinions and interpretations should not be given.

Evaluation of dictionaries, encyclopedias, etc.: The library does not recommend one dictionary or encyclopedia over another. The customer may come to the library to examine the various dictionaries and encyclopedias in the library's collection.

Values of art works, antiques, rare books, coins, stamps, currency, etc.: Appraisals of the value of art works, antiques, rare books, coins, stamps, currency and other collectibles are never given. Sources are available that give prices.

Medical, legal, statistical and technical information: The librarian should not interpret material of any type related to these fields, including tables, charts, equations, conversion formulas, laws, taxation and regulatory information, or legal and medical definitions.

Patent and copyright searches, etc.: Patent and copyright searches are not performed by library staff, nor does staff attempt to ascertain whether a published work is in the public domain. Appropriate referrals are made to ODL or OSU.

Genealogies and census microfilm: Genealogies are not prepared for customers by library staff. Basic resources are offered to the customer on how to begin genealogical research. Customers who wish to research person who lived in Oklahoma City may use the system's collection of city directories or the microfilmed "Daily Oklahoman." Referrals can also be made to the Oklahoma Historical Society, which hold a large selection of historical census records on microfilm. The Internet has genealogical resources and bookmarks have been placed in the System Bookmarks file. Census microfilm may be ordered by the customers for use at Belle Isle, Downtown, Ralph Ellison and Southern Oaks and must be used within the library.

Foreign languages: Foreign language translation requests are referred to such sources as Foreign Language Departments of colleges and universities.

Mathematical calculations: Library staff should not do mathematical calculations for customers. Information from tables and formulas can be read, but customers should do their own calculations.

Tax forms: The library does not provide tax forms. Customers should be referred to the appropriate state or federal agencies. They may use the Internet to do their own searches. Staff will not print tax forms from the Internet.

Inquiries by mail: This is third in priority. Under the direction of the supervisor of the unit, when the mail request requires more than a cursory search, an attempt to answer mailed

# **Access to Services**

## **AS 100 Reference Services**

*Revised: 1/98*

requests will be made within 20 working days. Customers will be invoiced at the rate of 25 cent per page for photo copying and \$3.00 shipping and handling. All correspondence should:

- Give source of information.
- Be copied and retained for a minimum of one year.
- Include name and department of person answering the inquiry.
- Electronic Reference Services: CD-ROM, On-Line Databases, Special Reference Service
- Staff are to be familiar with the CD-ROM holdings, on-line databases and special reference services of MLS libraries and are to use their best judgment when referring customers to other libraries for searches.
- Libraries may choose to batch these services due to time constraints, skill level and
- Specialization of the search.
- Each library may have a limit to the number of pages that will be printed. Customers with a library card will have charges debited to their prepaid account.
- Information will not be downloaded or saved to floppy disks.

## **Internet Service**

Internet Service: The Metropolitan Library System functions only as a "gateway" to Internet access.

The Internet is an unregulated source and the library system is not responsible for information provided. The Internet and the available resources in its global electronic network may be erroneous and out-of-date. The Metropolitan Library System is not responsible for the accuracy or currency of information presented on the Internet.

As with all reference services, the reference interview will help staff determine whether or not the Internet would be an appropriate source for a customer.

Staff are to be willing to assist customers with a search or to perform a search. If the requested information is not found within 15 minutes, staff may recommend that the

# **Access to Services**

## **AS 100 Reference Services**

*Revised: 1/98*

customer visit one of the libraries offering public Internet access and work with an Internet Coach.

# **Access to Services**

## **AS 400 Internet Access Policy**

**Adopted: 2/98, Revised: 6/01, 5/05**

### **Policy**

The library strives to facilitate equal information-access to every individual in our community. The Internet provides access to information far beyond the confines of the physical library. Through the application of this policy, the library endeavors to comply with all state and federal laws and provide all constitutionally protected information available on the Internet to all interested library customers.

While the Internet offers access to a wealth of material that is enriching, it also enables access to some material that may be offensive, disturbing and/or illegal. For this reason, the Metropolitan Library System requires only filtered access to the Internet when using library connections. The Metropolitan Library Commission and/or the Library System assume no responsibility whatsoever for use of the Internet by library customers of any age.

The library offers connectivity to the Internet via:

1. Networked public library computers
2. Wireless access where customers use their own wireless capable devices

### **Definitions**

- Internet, according to Merriam-Webster is “the electronic communications network that connects computer networks and organizational computer facilities around the world.”
- Wireless Internet access enables customers, with their own equipment, to connect to the Internet without wires or cables. Internet access is within a range of ‘hotspots’. With wireless Internet, the library offers the connection to the Internet while the customer uses their own wireless capable device.
- Filtered access means that the library uses a commercial product that blocks access to view specific Internet content defined by specific criteria. This is sometimes referred to as a ‘technology protection measure’.

### **Regulations**

Accessing the Internet via the library's computers and wireless Internet with customers' own wireless capable devices is eligible to all customers and all users agree to:

- Abide by library policies and procedures.
- Accept full responsibility for use of the Internet.
- Hold the library blameless for materials they or their child acquires on the Internet.

### **Internet Service Support**

The library offers Internet access for its customers at all agencies, and will provide:

1. Training and operational support documents.
2. Expert library staff who are available to help adults and children find the material that they are seeking, regardless of format.
3. Assistance to adult Internet users doing bonafide research, or other lawful purposes, who are unable to access an Internet site because of the filter.

# **Access to Services**

## **AS 700 Handling and Reporting Unusual Incidents**

*Adopted 8/76, Revised: 10/82, 2/91, 12/92, 6/97*

### **Policies**

General guidelines for library staff regarding use of the library.

Library staff members on duty are expected to handle unusual incidents with primary concern for the safety of patrons and staff and with a minimum amount of disruption or damage to the library's public image.

As public employees, library staff members are expected to cooperate with authorities; that is, if witnesses to, or victims of, an unlawful act committed on library property, employees are required to notify police as soon as possible and are expected to sign a complaint and testify in court if requested.

In all cases of crime, accident or other unusual incident occurring on library property, staff members in charge are instructed to report the circumstances promptly and accurately to the library administration.

The Metropolitan Library Act, 65.O.S. 1982 Supp 5551 et seq., governing the operation of the Metropolitan Library commission, authorizes the establishment of rules and regulations by the commission as may be deemed necessary or expedient for the operation of the libraries and to accomplish and facilitate the purposes of the Act, 65 O.S. 1982 Supp S558.

In accordance with this act the commission has established policies to govern the libraries and its users. These policies include the following code of personal conduct expected by visitors to the libraries:

- Acts such as tampering with, defacing, mutilating and theft of library property are unacceptable.
- Acts of violence or threats of violence are unacceptable.
- Acts of actions which disrupt the peaceful use of the library services by other customers are unacceptable.
- Comments, acts or actions which involve harassment based on sex, race, color, religion, national origin or handicap including those which create a hostile environment are unacceptable.
- Library customers, visitors and staff have a reasonable expectation of an environment free from communicable diseases, lice or other body or article infestation. The presence of individuals or items with these conditions is unacceptable.



# **Access to Services**

## **AS 700 Handling and Reporting Unusual Incidents**

*Adopted 8/76, Revised: 10/82, 2/91, 12/92, 6/97*

- Bathing (or shaving) in public rest rooms or fountains is unacceptable.
- Entering unauthorized workspaces, loading and building equipment areas is unacceptable.
- The blocking of aisles, elevators or traffic-ways, which impedes access by others, is unacceptable.
- Eating or drinking, except in designated areas, and use of tobacco products is unacceptable.
- Any other acts or actions not otherwise listed which would be considered criminal, whether misdemeanors or felonies, are unacceptable.

# REPORT OF UNUSUAL INCIDENT

## and "Problem User" Form

### metropolitan library system

#### Instructions:

- ☞ Use this form to report incidents such as criminal acts or other *non*-accidental disturbances and actions of "problem users".
- ☞ For guidance, read the library system's Policy and Procedure Manual, Section IV, Public Relations, Item A, "Handling and Reporting Unusual Incidents."
- ☞ Within two working days, send one copy of the completed form, with all relevant documentation, to the Director of Library Operations and the Director of Human Resources. Retain one copy in a secure, non-public area at the affected agency.
- ☞ Deputy Executive Director of Library Operations will send completed copy back to originating agency and will retain one copy.

**Incident date and time:** \_\_\_\_\_

**Incident Location:** \_\_\_\_\_

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#### Person or persons creating the incident:

(Give name, address, library card number, and telephone number, if known. If you do not have that information, provide a physical description-male, female, approximate height, weight, distinguishing features, clothing description, vehicle license number, etc.)

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**What happened?**

(Use space below. Give concise, factual information. Include names, addresses and telephone numbers of witnesses, security guards or police personnel involved. If a complaint was signed, list the name of the signer.)

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**What unacceptable behavior did you observe this customer doing?**

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**Action taken?**

(Use space below. Give as much detail as possible.)

Is the situation resolved? \_\_\_\_\_  
Please name person(s) creating incident: \_\_\_\_\_

\_\_\_\_\_  
Name and title of person completing this form Date submitted

\_\_\_\_\_  
Signature  
.....

Manager's Comments:

\_\_\_\_\_  
Recommendation: \_\_\_\_ No Action \_\_\_\_ Warning Letter \_\_\_\_ Internet/Computer Suspension  
\_\_\_\_ Ban from Library \_\_\_\_ Other \_\_\_\_\_

\_\_\_\_\_  
Signature of Library Manager Date

**OFFICE USE ONLY**

.....  
\_\_\_\_ Date Rec'd \_\_\_\_ Fax \_\_\_\_ Original \_\_\_\_ Other incident(s) – include date(s) and reason

\_\_\_\_\_  
Director's Comments/Recommendation:  
\_\_\_\_\_

\_\_\_\_\_  
Signature of Director of Library Operations Date

.....  
\_\_\_\_\_  
Deputy Executive Director of Library Operations Comments/Recommendation:

\_\_\_\_\_  
Signature of Deputy Executive Director of Library Operations Date

**INJURED EMPLOYEE / SUPERVISOR'S  
FIRST REPORT OF INJURY**

(Complete for work-related injury or illness)

Injured employee \_\_\_\_\_ Location \_\_\_\_\_ Occupation \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Supervisor's Name \_\_\_\_\_ Work Day Began \_\_\_\_\_ a.m. \_\_\_\_\_ p.m.

Date of injury \_\_\_\_\_ Time \_\_\_\_\_ a.m. \_\_\_\_\_ p.m.

Date reported \_\_\_\_\_ Time \_\_\_\_\_ a.m. \_\_\_\_\_ p.m.

Place of injury \_\_\_\_\_

Nature of injury \_\_\_\_\_  
(i.e. burn, cut, sprain, etc.)

Body part injured \_\_\_\_\_

Describe activities when injury occurred including object directly injuring employee

Was another individual directly/indirectly involved in accident? \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_

Who gave first aid if any? \_\_\_\_\_

Treating physician \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_

Did employee leave work? \_\_\_\_\_ When? \_\_\_\_\_  
(Date) (Time)

Has employee returned to work? \_\_\_\_\_ When? \_\_\_\_\_  
(Date) (Time)

Was employee wearing / using required equipment when the accident occurred? \_\_\_\_\_

Witnesses to accident \_\_\_\_\_

Was there any prior illness or injury which may have contributed to this injury? \_\_\_\_\_

\_\_\_\_\_  
Signature of Supervisor Date

\_\_\_\_\_  
Signature of employee Date

# Metropolitan Library System

## Accident Notice

Use when involving a Customer, Volunteer or Employee Driving MLS Vehicle

### Instructions:

- Use this form to report customer/volunteer accidents or illnesses that required the administering of first aid or/and the calling of a doctor, emergency, medical, police or fire department assistance, or customer/ volunteer's guardian or kin; also, for accidental damage to customer/volunteer's property or library property.
- For guidance, read the library system's Policies and Procedures Manual, AS 700 Handling and Reporting Unusual Incidents.
- Send one copy of the completed form as soon as possible to the Deputy Executive Director, Library Operations, Downtown Library, 300 Park Avenue and fax one copy to the Business Office at 606-3799. Retain one copy in a secure, non-public area of the affected agency.

Time of day and date of accident/illness/property damage: \_\_\_\_\_

Location: \_\_\_\_\_

Victim identification: (Give name, address and telephone number, if known. If you do not have that information, provide a physical description - male, female, approximate age, height, weight, distinguishing features, clothing description, car license number, etc.)

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What happened? (Use space below and continue on reverse side, if necessary. Give as much detail as you can. Include names, addresses and telephone numbers of witnesses, security guards, police personnel, other customer/volunteer and staff observing the accident/illness/damage to property. Tell what steps the library took, such as administering first aid, calling emergency number for help, who responded, where victim was taken, etc.)

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What further action, if any, should the library take?

---

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Name, title and signature of person completing this form: \_\_\_\_\_

Date submitted: \_\_\_\_\_

# **Stewardship of Financial Resources**

## **SF 400 Sale of Surplus Equipment**

*Adopted: 6/85; 4/06*

### **Policy**

1. Periodically, equipment becomes obsolete and surplus to the Library's needs.
2. A list of such items is presented to the Commission for approval of sale to the general public via sealed bid sale or retail sale. Funds received are deposited to the General Fund.
3. Commission members and Library employees and members of their households are not allowed to bid on or purchase surplus equipment.



# **Stewardship of Financial Resources**

## **SF 600 Travel and Registration Expense Reimbursement**

*Adopted: 5/88, Revised: 10/95, 12/02*

### **Policy**

Individual work schedules and library budget allocations permitting, the library may defray travel and/or registration expenses for staff members on authorized library business or attending professional or technical meetings and conferences. Agency or department heads and the respective Administrative Team members are authorized to approve travel and registration requests. The Executive Director approves travel and registration requests for Administrative Team members. The Metropolitan Library Commission (i.e., one of the officers) approves out-of-state travel for the Executive Director. The following criteria are applied in reviewing all requests:

1. The staff member's last Personnel Evaluation rating.
2. Purpose of the travel and relationship of the trip to the staff member's library duties and position.
3. For requests to attend professional association meetings or conferences, preference will be given to:
  - A. Staff members who hold elective or appointive offices or committee assignments or who are presenting portions of the respective program.
  - B. Library staff in administrative or supervisory positions (e.g., members of the Administrative Team, Library or Section Managers, etc.)

### **Procedures**

1. General Requirements and Restrictions:
  - A. All staff requesting leave to conduct library business or to attend professional meetings--even if they are not requesting travel reimbursement--must be approved by their supervisors. (See Item E of this section, Leave Policies).
  - B. The library does not allow compensatory time for travel to and from meetings and conferences that extend beyond the normal work week or work day (e.g., 8-hour day, 40-hour week).
2. To request approval of travel including prepayments for airfares or registration, complete and submit THREE copies of Travel Expense Request, MLS Form #522, to your immediate supervisor.
  - A. Indicate any prepayment requests for registration, ticketed meal functions, airline tickets, etc. Related forms of these prepayments should be completed

# **Stewardship of Financial Resources**

## **SF 600 Travel and Registration Expense Reimbursement**

*Adopted: 5/88, Revised: 10/95, 12/02*

and attached with the request. Ticketed meal functions should be charged to account 213 - professional service.

- B. The Travel Expense Request must be approved by immediate supervisor and respective Ad Team member. The Ad Team member approving the request will return one approved copy to the staff member making the request, one copy to the Business Office with any prepayment registration forms attached, and keep one copy.
  - C. The approved Travel Expense Request should be received by the Business Office at least TWO weeks before the payment due date for registration. If applicable, staff members should make their hotel reservations then file for reimbursement after the trip.
  - D. After receiving the approved travel request, staff members are authorized to make the travel reservations with the library system's designated travel agency and to charge the airfare to the library account; this should be designated as prepayment on form #522.
3. To obtain travel and/or registration reimbursement, following the meeting or travel, complete the Request for Reimbursement of Travel Expense, MLS Form #524, and submit three copies to your supervisor with the required receipts.
- A. Reimbursement for meal and incidental expenses will be in compliance with IRS regulations for "deductible business travel expenses" up to allowable current federal standard rates.
  - B. Itemized receipts for lodging must be attached.
  - C. Receipts or explanations are required for other expenses e.g., ground transportation or toll fees.
  - D. Deduct any prepaid items made by the Library system such as registration, airfare etc.
4. The supervisor will approve authorized reimbursement requests and forward a copy of Form #524 with required receipts to the Business Office, return one copy to the staff member, and keep one copy.
5. The Business Office will issue reimbursement checks.

# **SF 600 Travel and Registration Expense Reimbursement**

## **SF 600.1 Travel and Related Expenditure Guidelines (Subject to adjustment as rules and prices change)**

*Revised 10/03*

### **I. Transportation**

#### **A. Personal Vehicle**

Staff attending the same function within Oklahoma or the region are expected to car-pool or provide acceptable reasons why it is not feasible to do so. Only the driver (owner or provider of the vehicle) will be reimbursed for the mileage.

Staff traveling with a driver who is not an employee of the library system will be reimbursed only their pro-rata share of the cost and must provide a document for the amount charged and paid.

Staff claiming reimbursement for use of their personal vehicle will provide odometer readings. The supervisor may set maximum mileage reimbursement; e.g., 210 miles roundtrip to Oklahoma City-Tulsa.

Reimbursement rate: Current federal business standard mileage rate.

If the request for reimbursement for use of a personal vehicle is more than the costs of air travel for the same trip, reimbursement including enroute lodging and meal costs will be limited to the coach airfare.

Mileage incurred for in-state conferences or meetings may be included in monthly mileage reimbursement request (Form #414).

#### **B. Air**

Staff are expected to seek lowest-cost schedules (economy rates, discounts, where possible.)

First-class accommodations are not allowed except in emergency situations or due to physical handicap.

#### **C. Other**

These same guidelines apply to staff who may wish to travel by train or bus; in each instance, the maximum reimbursement will be limited to the coach airfare.

### **II. Lodging**

# **SF 600 Travel and Registration Expense Reimbursement**

## **SF 600.1 Travel and Related Expenditure Guidelines (Subject to adjustment as rules and prices change)**

*Revised 10/03*

Lodging expense decisions shall be made on the basis of the lowest inclusive cost to the library system to accomplish the objectives of the meeting. Supervisors are responsible for authorizing and approving lodging sites and costs. The request for lodging reimbursements must be supported by itemized receipts, credit card statement alone is not sufficient. Lodging expenses only include room charges and applicable taxes; other charges, such as telephone, room service, laundry service, fitness room charges, etc., are not part of lodging expenses.

### **III. Meal and Incidental Expenses (M&IE)**

Employees are reimbursed at actual cost up to federal standard M&IE rates. Under this method no receipts or other itemized records are required. Federal standard rates vary from year to year and for different localities. Check with the Business Office for current rates for budget purposes and before filling out the travel request.

If an employee receives a meal at nominal or no cost the M&IE rate must be adjusted by deducting the appropriate amount shown in the following chart. The examples are free breakfast provided by the hotel or the conference sponsors as well as lunch/dinner banquet included in the registration paid by the Library System.

Rate	\$31	\$35	\$39	\$43	\$47	\$51
Breakfast	\$6	\$7	\$8	\$9	\$9	\$10
Lunch	\$6	\$7	\$8	\$9	\$11	\$12
Dinner	\$16	\$18	\$20	\$22	\$24	\$26
Incidentals	\$3	\$3	\$3	\$3	\$3	\$3

For a partial day during which the employee is traveling away from home (usually the first or the last day of the trip), only three-fourths of the applicable federal M&IE rate will be paid.

Incidental expenses cover fees/tips given to porters, waiters, baggage handlers, hotel maid etc. Therefore, this type of costs cannot be reimbursed under "other" expenses.

Taxi fare or costs of library-related telephone calls are not incidental costs; they may be reimbursed under "other " expenses.

# **SF 600 Travel and Registration Expense Reimbursement**

## **SF 600.1 Travel and Related Expenditure Guidelines (Subject to adjustment as rules and prices change)**

*Revised 10/03*

M&IE will be reimbursed only for the business travel that requires sleep or rest (overnight travel).

### **IV. Other Expenses**

The reimbursement of other expenses such as ground transportation, business telephone calls, and toll fees are to be substantiated by receipts. If receipts is not available then a description on the Request for Reimbursement Form for the nature of the expenses, the date, the amount and the fact that no receipts were given or receipts were lost is acceptable.

# SF 600 Travel and Registration Expense Reimbursement

## SF 600.2 Mileage Reimbursement Guidelines

*Revised: 5/01*

Employees can be reimbursed in most instances for miles driven for library business. However, mileage to and from your workplace and your home cannot be considered business mileage and will not be reimbursed. The reimbursement rate is the current standard federal rate for business expenses.

If you are **required** to attend work related activities, you are eligible for mileage reimbursement. Examples are:

- Metropolitan Library Commission meetings or committee meetings
- OLA board committee meetings and in-county conferences
- Official MLS task forces, committees or teams including staff development day and staff recognition reception committees
- Library Managers meetings
- ODL meetings and workshops
- Friends of MLS & FOLIO meetings
- Temporary work or training at a location other than the normal workplace
- Supervisor-approved workshops, seminars, etc.
- Other library-related meetings determined eligible by supervisors

Attendance at the following activities is **not** eligible for mileage reimbursement:

- Staff Association board and committee meetings
- Staff Development Day
- Staff recognition reception
- Retirement & related receptions
- Temporary assignment at a location for regular duties. *This guideline does not apply to traveling library assistants.*

# **SF 600 Travel and Registration Expense Reimbursement**

## **SF 600.2 Mileage Reimbursement Guidelines**

*Revised: 5/01*

All out-of-county conferences should be pre-approved via the travel request form (MLS No. 522) and be paid from account 212 (travel) or 213 (professional services).

Reimbursable mileage should be calculated from the employee's regular work place to the destination and back to the regular work place. If the number of miles is not available from a mileage reference chart or other information, odometer readings should be used.

To request a reimbursement, submit a completed mileage reimbursement form (MLS No. 414) to the Business Office. Mileage must be documented in spaces provided on the back of the form. It is the supervisor's responsibility to verify attendance and mileage.

Reimbursements under \$50 are paid in cash. Reimbursements of \$50 or more are paid by check.

All requests should be submitted monthly and received in the Business Office as soon as possible after the last day of the month.

**Role:** Human Resources (HUM) Department provides services to the MLS in recruiting and hiring, in the administration of compensation and benefits, and in payroll. The HUM department assists the library agencies and the other departments in meeting their staffing goals, managing job performance, and interpreting policy. The department also supports employees and their supervisors in reaching understanding and reconciling differences to promote effective working relationships.

**Questions on policies and procedures:** Employees and supervisors are encouraged to call on a member of the HUM staff at any time for help in any area of policy or procedure. Any question can be addressed to any member of the department, who will answer it or direct it to the appropriate authority in the department.

**Working relationships:** Occasionally, an employee and his/her supervisor may have difficulty working with each other or maintaining an effective working relationship. Support for employee relations is available to assure treatment consistent with the policies in this handbook, and employees should seek help to mediate difficult discussions. Those in supervisory positions also frequently call on the HUM department to act as a neutral third party in order to facilitate communication and restore productive working relationships.

### Employment Procedures

The Human Resource Department and the supervisor(s) seeking to fill a job vacancy work jointly on recruiting and hiring staff and in using the services of the HUM office in finding, screening, and selecting candidates.

The Metropolitan Library System is committed to:

- Affirmative action as an integral part of the process of recruitment, selection, placement, transfer, and promotion;
- Promotion from within whenever possible;
- Full and timely consideration of all candidates.

**Posting:** Job Opening Announcements are made available as widely as possible and to identify as many suitable candidates as feasible. Offers of employment may be made only after the required posting period. Public may view the list of current job postings by visiting the MLS website at: <http://www.metrolibrary.org/employment.htm>.

**Transfer or promotion from within:** The MLS encourages and assists employees in attaining personal career goals by giving qualified, interested employees an opportunity for transfer or promotion. Employees should watch the Job Opening Announcements for opportunities and complete the application process required. Further information on transfer or promotion opportunities can be obtained by contacting the HUM department located at



the Ronald J. Norick Downtown Library, 300 Park Ave., Oklahoma City, OK 73102.

**Employee referrals:** Employees are encouraged to refer qualified people to the Metropolitan Library System for employment. Effective June 19, 1986, the MLS will not knowingly hire or contract with anyone for employment who is a close relative of any current library employee or Commission member. A complete description of this policy is located at:

[http://morris/GotInfo/policy\\_procedures/section\\_s/item\\_sh/subsection\\_sh-300/sh310\\_prohibitinghire\\_relatives\\_2003.pdf](http://morris/GotInfo/policy_procedures/section_s/item_sh/subsection_sh-300/sh310_prohibitinghire_relatives_2003.pdf).

**Applications and resumes:** An interested applicant is required to complete a Library Applications Form. **NOTE:** Resumes alone are not sufficient. A new online system is available for Applying to the Metropolitan Library System and can be found:

[http://tbe.taleo.net/NA1/ats/careers/jobSearch.jsp?org=METROLIBRARY&cw\\_s=1](http://tbe.taleo.net/NA1/ats/careers/jobSearch.jsp?org=METROLIBRARY&cw_s=1)

The Employment Manager or the Director of Human Resources forwards the appropriate applications to the hiring manager(s) who reviews the applications and selects the applicants to be interviewed.

**Good faith search:** An effort is made in good faith to include among the applicant members of groups underrepresented in the library's workforce. Searches are conducted in compliance with the equal opportunity laws of the United States and the affirmative action plan of the Metropolitan Library System.

## **Nondiscrimination**

The Metropolitan Library System does not discriminate against any individual or permit discrimination by any member of its community against any individual on the basis of race, color, religion, national origin, sex, sexual orientation, parental status, marital status, age, disability, citizenship, or veteran status.

Harassment, whether verbal, physical, or visual, that is based on any of these characteristics is a form of discrimination. This includes harassing conducted affecting tangible job benefits, interfering unreasonably with an individual's academic or work performance, or creating what a reasonable person would sense is an intimidating, hostile, or offensive environment.

**Complaint:** A complaint of discrimination on any basis in this policy can be filed with the director of equal opportunity, affirmative action, and labor relations. A complaint about the actions of the director will be investigated by an impartial System official. Time spent during scheduled working hours in the formal procedure is treated as time worked. Complaints of sexual harassment follow the procedure on page 112.

**Appeal:** An employee not satisfied with the resolution of a complaint may appeal.

## **Affirmative Action**

The Metropolitan Library System actively seeks men, women, minorities, veterans, and disabled person for employment and promotion to maintain a community based on equal opportunity.

# Equal Employment Opportunity is THE LAW

## Employers Holding Federal Contracts or Subcontracts

Applicants to and employees of companies with a Federal government contract or subcontract are protected under the following Federal authorities:

### **RACE, COLOR, RELIGION, SEX, NATIONAL ORIGIN**

Executive Order 11246, as amended, prohibits job discrimination on the basis of race, color, religion, sex or national origin, and requires affirmative action to ensure equality of opportunity in all aspects of employment.

### **INDIVIDUALS WITH DISABILITIES**

Section 503 of the Rehabilitation Act of 1973, as amended, prohibits job discrimination because of disability and requires affirmative action to employ and advance in employment qualified individuals with disabilities who, with reasonable accommodation, can perform the essential functions of a job.

### **VIETNAM ERA, SPECIAL DISABLED, RECENTLY SEPARATED, AND OTHER PROTECTED VETERANS**

38 U.S.C. 4212 of the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended, prohibits job discrimination and requires affirmative action to employ and advance in employment qualified Vietnam era veterans, qualified special disabled veterans, recently separated veterans, and other protected veterans.

Any person who believes a contractor has violated its nondiscrimination or affirmative action obligations under the authorities above should contact immediately:

The Office of Federal Contract Compliance Programs (OFCCP), Employment Standards Administration, U.S. Department of Labor, 200 Constitution Avenue, N.W., Washington, D.C. 20210 or call (202) 693-0101, or an OFCCP regional or district office, listed in most telephone directories under U.S. Government, Department of Labor.

Stewardship of Human Resources

## Private Employment, State and Local Governments, Educational Institutions

Applicants to and employees of most private employers, state and local governments, educational institutions, employment agencies and labor organizations are protected under the following Federal laws:

### **RACE, COLOR, RELIGION, SEX, NATIONAL ORIGIN**

Title VII of the Civil Rights Act of 1964, as amended, prohibits discrimination in hiring, promotion, discharge, pay, fringe benefits, job training, classification, referral, and other aspects of employment, on the basis of race, color, religion, sex or national origin.

### **DISABILITY**

The Americans with Disabilities Act of 1990, as amended, protects qualified applicants and employees with disabilities from discrimination in hiring, promotion, discharge, pay, job training, fringe benefits, classification, referral, and other aspects of employment on the basis of disability. The law also requires that covered entities provide qualified applicants and employees with disabilities with reasonable accommodations that do not impose undue hardship.

### **AGE**

The Age Discrimination in Employment Act of 1967, as amended, protects applicants and employees 40 years of age or older from discrimination on the basis of age in hiring, promotion, discharge, compensation, terms, conditions or privileges of employment.

### **SEX (WAGES)**

In addition to sex discrimination prohibited by Title VII of the Civil Rights Act of 1964, as amended (see above), the Equal Pay Act of 1963, as amended, prohibits sex discrimination in payment of wages to women and men performing substantially equal work in the same establishment.

Retaliation against a person who files a charge of discrimination, participates in an investigation, or opposes an unlawful employment practice is prohibited by all of these Federal laws.

If you believe that you have been discriminated against under any of the above laws, you should contact immediately:

The U.S. Equal Employment Opportunity Commission (EEOC), 1801 L Street, N.W., Washington, D.C. 20507 or an EEOC field office by calling toll free (800) 669-4000. For individuals with hearing impairments, EEOC's toll free TDD number is (800) 669-6820.

## Programs or Activities Receiving Federal Financial Assistance

### **RACE, COLOR, RELIGION, NATIONAL ORIGIN, SEX**

In addition to the protection of Title VII of the Civil Rights Act of 1964, as amended, Title VI of the Civil Rights Act prohibits discrimination on the basis of race, color or national origin in programs or activities receiving Federal financial assistance. Employment discrimination is covered by Title VI if the primary objective of the financial assistance is provision of employment, or where employment discrimination causes or may cause discrimination in providing services under such programs. Title IX of the Education Amendments of 1972 prohibits employment discrimination on the basis of sex in educational programs or activities which receive Federal assistance.

### **INDIVIDUALS WITH DISABILITIES**

Sections 501, 504 and 505 of the Rehabilitation Act of 1973, as amended, prohibits employment discrimination on the basis of disability in any program or activity which receives Federal financial assistance in the federal government. Discrimination is prohibited in all aspects of employment against persons with disabilities who, with reasonable accommodation, can perform the essential functions of a job.

If you believe you have been discriminated against in a program of any institution which receives Federal assistance, you should contact immediately the Federal agency providing such assistance.

# STATE OF OKLAHOMA CHILD LABOR LAW

*Section 71 et seq. of Title 40 of the Oklahoma Statutes*

**Child Labor Ages** 14 and 15 years of age only; except working either on farms or for parents or any entity in which a parent owns an equity interest; or selling or delivering newspapers

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**Employment Certificate** Employment certificate issued by schools; required for all employed minors, including home schooled minors and minors from out-of-state working in Oklahoma

- ✓ White copy – employer required to keep on file
- ✓ Yellow copy – school sends to Oklahoma Department of Labor
- ✓ Pink copy – school keeps with green application

**Note to Issuing Officer(s):** Minors must comply with compulsory School Laws, Title 70 Section 10

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**Hours Standard** School in session – minors restricted to:

- ✓ No more than three (3) hours per school day
- ✓ No more than eight (8) hours per non-school day
- ✓ No more than eighteen (18) hours per school week

School not in session – minors restricted to:

- ✓ No more than eight (8) hours per non-school day
- ✓ No more than forty (40) hours per non-school week

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**Break Periods** For every five (5) hours worked – Thirty (30) minute rest period  
For every eight (8) hours worked – One (1) hour rest period

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**Times Standard** From Tuesday after Labor Day through May 31<sup>st</sup> – minors:

- ✓ Can not work before 7:00 a.m. and not after 7:00 p.m.

From June 1<sup>st</sup> through Labor Day – minors:

- ✓ Can not work before 7:00 a.m. and not after 9:00 p.m.

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**Prohibited Occupations** Occupations which threaten health and well-being, including but not limited to:

Baking	Communications	Construction
Cooking	Cutters	Demolition
Fryers	Grills	Hoisting devices
Loading	Machinery	Manufacturing
Mining	Motor vehicles	Mowers
Processing	Public messenger	Transportation
Warehouse	Weed eaters	

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**Presentations Available** Labor Commissioner Brenda Reneau and the Oklahoma Department of Labor Employment Standards Division–Child Labor Unit staff are available for presentations to classes, issuing officers, PTAs/PTOs, employer groups, etc. Please contact the Oklahoma Department of Labor for more information.

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## IT'S THE LAW!

1-888-269-5353  
[www.labor.ok.gov](http://www.labor.ok.gov)



# ***Your Rights Under the Fair Labor Standards Act***

***Federal Minimum Wage***  
**\$4.75** *per hour*  
***beginning October 1, 1996***

**\$5.15** *per hour*  
***beginning September 1, 1997***

Employees under 20 years of age may be paid \$4.25 per hour during their first 90 consecutive calendar days of employment with an employer.

Certain full-time students, student learners, apprentices, and workers with disabilities may be paid less than the minimum wage under special certificates issued by the Department of Labor.

**Tip Credit** – Employers of “tipped employees” must pay a cash wage of at least \$2.13 per hour if they claim a tip credit against their minimum wage obligation. If an employee’s tips combined with the employer’s cash wage of at least \$2.13 per hour do not equal the minimum hourly wage, the employer must make up the difference. Certain other conditions must also be met.

## ***Overtime Pay***

At least 1½ times your regular rate of pay for all hours worked over 40 in a workweek.

## ***Child Labor***

An employee must be at least **16** years old to work in most non-farm jobs and at least **18** to work in non-farm jobs declared hazardous by the Secretary of Labor. Youths **14** and **15** years old may work outside school hours in various non-manufacturing, non-mining, non-hazardous jobs under the following conditions:

No more than –

- **3** hours on a school day or **18** hours in a school week;
- **8** hours on a non-school day or **40** hours in a non-school week.

Also, work may not begin before **7 a.m.** or end after **7 p.m.**, except from **June 1** through **Labor Day**, when evening hours are extended to **9 p.m.** Different rules apply in agricultural employment.

## ***Enforcement***

The Department of Labor may recover back wages either administratively or through court action, for the employees that have been underpaid in violation of the law. Violations may result in civil or criminal action.

Fines of up to \$10,000 per violation may be assessed against employers who violate the child labor provisions of the law and up to \$1,000 per violation against employers who willfully or repeatedly violate the minimum wage or overtime pay provisions. This law prohibits discriminating against or discharging workers who file a complaint or participate in any proceedings under the Act.

- Note:**
- Certain occupations and establishments are exempt from the minimum wage and/or overtime pay provisions.
  - Special provisions apply to workers in American Samoa.
  - Where state law requires a higher minimum wage, the higher standard applies.

**For Additional Information, Contact** the Wage and Hour Division office nearest you – listed in your telephone directory under United States Government, Labor Department.

This poster may be viewed on the Internet at this address: <http://www.dol.gov/esa/regs/compliance/posters/flsa.htm>

***The law requires employers to display this poster where employees can readily see it.***







# NOTICE

## EMPLOYEE POLYGRAPH PROTECTION ACT

The Employee Polygraph Protection Act prohibits most private employers from using lie detector tests either for pre-employment screening or during the course of employment.

### PROHIBITIONS

Employers are generally prohibited from requiring or requesting any employee or job applicant to take a lie detector test, and from discharging, disciplining, or discriminating against an employee or prospective employee for refusing to take a test or for exercising other rights under the Act.

### EXEMPTIONS\*

Federal, State and local governments are not affected by the law. Also, the law does not apply to

The Act permits *polygraph* (a kind of lie detector) tests to be administered in the private sector, subject to restrictions, to certain prospective employees of security service firms (armored car, alarm, and guard), and of pharmaceutical manufacturers, distributors and dispensers.

The Act also permits polygraph testing, subject to restrictions, of certain employees of private firms who are reasonably suspected of involvement in a workplace incident (theft, embezzlement, etc.) that resulted in economic loss to the employer.

### EXAMINEE RIGHTS

Where polygraph tests are permitted, they are subject to numerous strict standards concerning the conduct and length of the test. Examinees have a number of specific rights, including the right to a written notice before testing, the right to refuse or discontinue a test, and the right not to have test results disclosed to unauthorized persons.

### ENFORCEMENT

The Secretary of Labor may bring court actions to restrain violations and assess civil penalties up to \$10,000 against violators. Employees or job applicants may also bring their own court actions.

### ADDITIONAL INFORMATION

Additional information may be obtained, and complaints of violations may be filed, at local offices of the Wage and Hour Division. To locate your nearest Wage-Hour office, telephone our toll-free information and help line at 1 - 866 - 4USWAGE (1 - 866 - 487 - 9243). A customer service representative is available to assist you with referral information from 8am to 5 pm in your time zone; or if you have access to the internet, you may log onto our Home page at [www.wagehour.dol.gov](http://www.wagehour.dol.gov).

**THE LAW REQUIRES EMPLOYERS TO DISPLAY THIS POSTER WHERE EMPLOYEES AND JOB APPLICANTS CAN READILY SEE IT.**

*\*The law does not preempt any provision of any State or local law or any collective bargaining agreement which is more restrictive with respect to lie detector tests.*

## METROPOLITAN LIBRARY SYSTEM EMPLOYMENT PROCESS

### Authority:

Title 65, Article 10, Section 556 of the Oklahoma Statutes Annotated provides that the executive director of the library system may appoint and remove staff members and other employees, subject to the approval of the commission. Through the Metropolitan Library Commission adopted Policies and Procedures, Section VIII, Item G, a centralized personnel function is established and the Director of Human Resources is delegated the authority under the Executive Director to coordinate advertising, job announcements, correspondence with applicants, screening and referral of applications, offers of employment and applicant notification.

### Administrative Process

1. The program manager completes and sends an Employee Requisition (Form MLS 520) to the Human Resources Office. (Either in hard copy or by e-mail.)
2. The Director of Human Resources, or the Employment Manager, will make the determination if recruitment is required or if the position can be filled from applications on hand. (Page openings are frequently filled from the applications on file in the Human Resources Office.)
3. All applications received at a location other than the Human Resources Office must be forwarded to the Human Resources for screening and comparison with other applications.
4. The Human Resources Office will screen applications and make referrals to the supervisor.
5. Once applications have been referred by the Human Resources Office, it becomes the responsibility of the supervisor to call the applicants and arrange a time for an interview.
6. All supervisors are strongly encouraged to conduct interviews using an interview team. Team members need to be the same for all interviewed applicants for that particular opening.

7. As a part of the interview process, supervisor's should notify the applicant that the library system conducts criminal records checks as part of the review process and have all interviewed applicants complete the OSBI criminal records check form.
8. At the conclusion of the interview, the spokesperson for the interview team should:
  - a. express the library system's appreciation for the applicant taking his/her time to interview.
  - b. indicate to the applicant that after all interviews are concluded, backgrounds checks have been conducted, and a final decision has been reached, the Human Resources Office will be in contact with all applicants. Indicate that the process should be completed by (*give a date*) and that if the library can't meet that date, we will let them know. (This date must be established in conjunction with the Human Resources Office prior to the first interview.)
  - c. never tell an applicant that they are the only applicant or give them any indication of their standing among the applicants.
9. Following the interviews, applicant referral forms with the supervisor's/interview team's recommendation must be completed and returned to the Human Resources Office for each applicant referred. This must be done in a timely manner as the interview team has indicated a notification deadline. The offer of employment to a selected applicant may not be made until all referral forms are received unless prior arrangements have been made with Human Resources.
10. Following information and records checks conducted by the Human Resources Office, a member of that office's staff will offer the selected applicant the position. Except for the Executive Director, no other staff member has the authority to offer employment.
11. Upon acceptance of the offer of employment and reaching agreement with the applicant and supervisor as to the starting date and salary, the Human Resources Office will provide the supervisor a new employee packet for account 102 employees. The contents of this packet are to be given to the new employee and reviewed by the supervisor with him or her.



All new account 101 employees should be scheduled to start (first day of work) only on Mondays that begin pay periods (exception: start of a pay period is a Monday holiday). The Human Resources Office will notify them about new employee orientation, parking, lunch, and when to report at their normal location.

12. The Human Resources Office will notify the unsuccessful applicants by mail.
13. The supervisor will see that the forms contained in the packet, for account 102 employees, which require a return to the Human Resources Office are completed on the first day of employment and returned.
14. The Human Resources Office will insure that all required paperwork is completed at new employee orientation (TrueNorth) for all account 101 employees.

# **SH 100 Wages and Hours**

## **SH 110 - Salary Administration**

*Adopted: 9/92, Revised: 2/03*

### **Purpose of Salary Administration Program**

The salary administration program is the formal system for classifying and compensating employees in the Metropolitan Library System. It is divided into two distinct programs or plans.

1. The Classification Plan, which is the categorization of job positions, duties and necessary qualifications.
2. The Compensation Plan, which provides a salary structure.

### **Amendment of Salary Administration Program**

The Director of Human Resources, when necessary or when requested by the library system's Executive Director, shall cause the salary administration program to be examined for the purpose of amendment. On the basis of conclusions reached through this examination, the Executive Director will present recommendations for revisions in the salary administration program to the Metropolitan Library Commission for appropriate action. The salary administration program shall constitute the pay schedule for positions and shall be effective for the ensuing fiscal year (or at such time as the Commission may designate) and thereafter until amended or a new salary administration program is adopted by the Commission.

### **Classification Plan**

The position Classification Plan provides a systematic arrangement and inventory of the positions within the library system. Each job description lists the minimum requirements or qualifications needed to perform the job such as education, work experience and other qualifications. By describing essential job functions, job duties, responsibilities and qualifications, the Classification Plan provides guidelines for establishing a pay plan based on these relationships.

#### **1. Job Descriptions**

Job descriptions are descriptive and explanatory and are not necessarily inclusive of all duties performed. They are designed to indicate the types of duties and level of responsibilities assigned to the class. The use of a particular description as to duties, qualifications or other factors shall not be held to exclude others of similar kind or quality.

#### **2. Official Copy of Job Descriptions**

# **SH 100 Wages and Hours**

## **SH 110 - Salary Administration**

*Adopted: 9/92, Revised: 2/03*

- A. The Director of Human Resources shall maintain a master set of all approved job descriptions which shall constitute the official Classification Plan. The copies of the descriptions may include the date of adoption and/or last revision of the job description.
- B. The Director of Human Resources shall make available to each department head a set of job descriptions of those positions in his or her department and other positions as necessary. Job descriptions maintained in Human Resources shall be open for inspection by employees and the public under reasonable conditions during business hours.

### **3. Titles of Positions**

The title of a position shall be used to designate the position in all budget estimates, payrolls and other official records, documents, vouchers and communications in connection with all personnel processes.

### **4. Minimum Qualifications**

Minimum qualifications are considered comprehensive statements of the minimum required education, experience and other qualifications for all cases as evidence of an employee's ability to perform the work properly. Reasonable accommodation of all disabilities qualifying under the Americans with Disabilities Act will be considered on a case by case basis.

## **Procedures for the Classification of New Positions**

- 1. The Director of Human Resources shall create new job descriptions for positions upon receipt of the prescribed forms indicating a statement of duties, responsibilities and requirements of such position from the Ad Team level administrator. Whenever a new position is created, a completed Position Description Questionnaire (PDQ) must be submitted to the Director of Human Resources. A desk audit and/or interview with the incumbent, Ad Team level administrator and/or supervisor may be required by the Director of Human Resources after a new position is created and occupied, to verify that the position has been appropriately allocated.
- 2. The Director of Human Resources reviews and recommends approval or disapproval to the Executive Director all proposed position creations, allocations, reallocations and abolishments.
- 3. The Executive Director shall review and approve or disapprove recommendations of the Director of Human Resources regarding all proposed position creations, allocations, reallocations and abolishments.

# **SH 100 Wages and Hours**

## **SH 110 - Salary Administration**

*Adopted: 9/92, Revised: 2/03*

### **Procedures for the Reclassification of Positions**

The Director of Human Resources shall recommend changing the classification of existing positions when it is determined that the position is incorrectly classified. Such action is called reclassification and must be reviewed and approved by the Executive Director. If an employee has facts, which indicate that his/her position is improperly classified, the employee may request the Director of Human Resources to review the classification of the position, with the knowledge of involved Ad Team level administrator. Such request shall be submitted in writing and shall contain a statement of justification. For this or any other type of request for reclassification from any source, the Director of Human Resources shall thereupon investigate actual or suggested duties of the position and, if warranted, recommend the Executive Director approve reclassification of the position to its appropriate grade if warranted. Reclassification may occur as the result of the conditions described below.

1. The position was incorrectly classified and there has been no substantial change in duties from those in effect when the position was originally categorized.

If the position is occupied at the time of reclassification, the employee shall be entitled to serve therein and retain the corresponding status after the position is reclassified.

2. There has been a substantial change in the duties and responsibilities associated with a position since it was classified to a particular grade.
  - A. If the position is assigned a higher pay grade than the current position, such action is considered an upgrade for the position. If the position is occupied at the time of an upgrade, the incumbent may be reclassified without examination, but does have to meet the minimum qualifications of the new position if they are changed. In the case of an upgrade resulting from a reclassification, if the employees' salary falls within the range for the higher pay grade, no salary increase is involved. If the employees' salary falls below the minimum for the higher pay grade, a salary increase to the minimum of the higher grade is required.
  - B. If the position is assigned to a lower grade, the change is called a downgrade of the position. If the position is occupied, the incumbent will continue at the same pay and may receive increases to the maximum of the range of the lower grade. If the current salary is above the maximum for the lower grade, the employee shall be permitted to continue at the present rate of pay, but will not be entitled to future salary increases until market adjustments have extended the maximum of the range beyond the employee's salary.

# **SH 100 Wages and Hours**

## **SH 110 - Salary Administration**

*Adopted: 9/92, Revised: 2/03*

- C. In all cases of reclassification, if the position is vacant, it shall be filed in the prescribed manner. In all cases of reclassification of an occupied position, the incumbent is reclassified consistent with the new classification. The review date of the incumbent is not changed by reclassification. Any employee affected by reclassification of his/her position may file with the Director of Human Resources a written request for reconsideration thereof in such manner and form as the Director of Human Resources may prescribe and shall be given a reasonable opportunity to be heard thereon.

### **Abolishment of Positions**

Whenever there is justification for abolishing a position such as lack of work, reorganization, lack of funds or other reasons, the Ad Team level administrator shall make such recommendation to the Director of Human Resources. The Director of Human Resources shall review and present such recommendation for approval to the Executive Director. In no case will a position be abolished solely as a means of terminating an employee.

### **Maintenance of the Classification**

1. Each time a group or department is substantially reorganized, the Ad Team level administrator will submit new Position Description Questionnaires for all affected positions to the Director of Human Resources.
2. The Director of Human Resources may require the Ad Team level administrator to submit Position Description Questionnaires at any time when there is reason to believe there has been a change in duties and responsibilities of one or more positions.
3. Any change in the Classification Plan, such as establishing new positions, abolishing positions, reclassifying positions or pay grade changes for positions require prior review by the Director of Human Resources and the approval of the Executive Director.
4. Periodically, the Director of Human Resources shall review the Classification Plan to determine if changes need to be made.

### **Compensation Plan**

The Compensation Plan is designed as a fair and equitable method for payment of employees in the library system. The plan establishes a basic salary schedule as approved by the Commission. The salary ranges shall include minimum and maximum rates of pay for all positions included in the Classification Plan. In addition to the basic

# **SH 100 Wages and Hours**

## **SH 110 - Salary Administration**

*Adopted: 9/92, Revised: 2/03*

salary schedule, the Compensation Plan consists of two salary components. These two mechanisms include market adjustments and performance increases.

### **1. Components of the Compensation Plan**

The compensation for each employee is the product of the basic salary structure and the two components of the Compensation Plan that shall be used to adjust employee compensation. These two components are discussed in detail in the following sections.

#### **A. Market Adjustment**

The market adjustment is the component that is used to insure that the salary structure is adjusted equally across-the-board to reflect changes in the wage index. Two considerations dictate whether or not a market adjustment will be administered: changes in the wage index based upon references such as the Bureau of Labor Statistics (BLS) and the budgetary constraints of the library system. Each year, the Commission shall vote on the applicability and the ability to apply a market adjustment to the salary structure. When applicable and when funds are available, a percentage increase will be applied equally to all ranges and will be applied to all eligible employee salaries.

#### **B. Performance Awards**

The performance award component is designed to reward job performance, therefore, serving as an incentive system. Increases are awarded to employees whose performance is evaluated as consistently competent and/or above standard. The performance appraisal is essential to the effective utilization of this component. The performance system is based upon the principle that standard or above standard performance should be rewarded because such performance is a greater contribution to the library system than below standard performance. The performance award is strictly used to monetarily reward standard or exceeding standard performance. Employee performance will be evaluated in accordance with the Performance Appraisal Policy of the library system (Policy & Procedures Manual Section VIII, Item - C). Employees whose performance is evaluated in accordance with the appraisal policy may receive performance increases based upon the guide adopted by the library commission. Performance award increase percentages in this guide are set annually as a part of the budget process based upon the financial ability of the library system to offer them. A model guide is presented as Attachment A to this policy; however, the increase percentages shown are strictly an example and are in no way binding for any year.

Employees at the maximum of their salary range are not eligible for performance increases. However, they are eligible for performance bonuses,

# **SH 100 Wages and Hours**

## **SH 110 - Salary Administration**

*Adopted: 9/92, Revised: 2/03*

which shall be paid in the form of lump sum bonuses. These bonuses are earned at the rate of three-fourths of the applicable performance award increase percentage of annual base pay.

### **2. Starting Rates for New Employees**

In most cases, a new employee will be paid the minimum rate of pay for the position. Exceptions may be granted upon the recommendation of the Director of Human Resources and approval of the Executive Director. Exceptions may be made in the following cases.

- A. The minimum rate for each position is based upon the assumption that a new employee meets the minimum qualifications stated in the job description. In the event that qualified applicants cannot be located for a given position, consideration should be given to establishing a new position at a lower grade which will reflect lower level duties and corresponding lower entrance requirements.
- B. If a selected candidate exceeds the minimum qualifications stated in the job description and will not accept appointment at the minimum rate for the position, the candidate may be appointed at a higher rate up to the midpoint of the salary range. These cases should be thoroughly analyzed and measured against objective qualification standards

Consideration should be given to review and compare the salaries of employees in similar positions. In addition, every effort should first be made to recruit a qualified employee who will accept appointment at the minimum rate for the position.

- C. Difficulty of recruitment may require payment of a higher rate. If difficulty of recruitment at the minimum rate in the salary range persists, consideration should be given to assigning a higher hiring rate or reevaluation of the position to determine if a higher pay grade is indicated.

### **3. Part-time Employment**

- A. Individuals employed on a part-time basis in positions with equivalent full-time positions in the Classification Plan are assigned to appropriate grades by the Director of Human Resources. The same principles, which apply to the Compensation Plan for full-time employees, will determine salary procedures for these part-time employees. These part-time employees can qualify to earn a performance award (increase and/or bonus) on the same basis as full-time employees.

# **SH 100 Wages and Hours**

## **SH 110 - Salary Administration**

*Adopted: 9/92, Revised: 2/03*

- B. Individuals employed on a part-time basis in positions where no equivalent full-time position exists will be assigned to a pay range on a compensation plan specifically adopted for part-time employees. These part-time employees can qualify to earn performance increases in accordance with the procedure for granting performance awards for part-time pages.
- C. Both types of part-time employees are eligible for market adjustments in accordance with these policies.

### **4. Reinstated Employees**

A reinstated employee shall be paid at a salary rate within the approved salary range for the position in which the employee is reinstated. The salary level in the range will be related to, but not limited to such factors as performance, experience and length of previous service in the library system and shall be set by the Director of Human Resources with the approval of the Executive Director.

### **5. Employee Transfers**

An employee may be transferred to another department or location in a similar position, and such transfer shall not change the employee's pay grade or the date from which eligibility for consideration for a performance increase will be counted.

### **6. Temporary Work at a Higher Classification**

An employee may be required to work at a higher classification on a temporary, incidental or emergency basis with the approval of the Director of Human Resources or Executive Director and may do so for a period of thirty (30) days or less at no increase in pay. If the employee is required to perform the duties for a period exceeding thirty (30) days, the employee may be given an emergency appointment (or provisional appointment) to the higher position and be paid the appropriate rate for the higher classification. At the conclusion of the assignment, the employee's pay will revert to the authorized rate established for the employee's regular position. Any such temporary increase granted will not affect the employee's eligibility for normal merit advancements. Temporary assignment may not exceed six (6) months without written approval for extension by the Director of Human Resources and approval by the Executive Director.

## **Promotional Increase Policy**

When an employee occupying a full-time position or a part-time position for which there is a full-time equivalency is promoted to a position in a higher grade, the employee's salary will increase at least to the minimum or hiring salary of the new grade. If an employee is promoted to a position one grade higher, the increase will be at least the minimum or



# **SH 100 Wages and Hours**

## **SH 110 - Salary Administration**

*Adopted: 9/92, Revised: 2/03*

hiring salary of the new grade or at least the percentage interval difference (usually 8% or 9%) between the old and new grades added to the previous salary, whichever is the greater. If any employee is promoted to a position two or more grades higher, the increase will be at least the minimum or hiring salary of the new grade, or at least ten percent (10%) and not more than fifteen percent (15%) more than the previous salary. In no case shall the increase be in excess of the maximum of the new range.

When a part-time employee occupying a position for which there is no full-time equivalency is promoted to a position in a higher grade, the employee will be treated as a new hire when considering the starting rate for the full-time position (i.e., up to the midpoint of the salary range).

The Director of Human Resources will determine the amount of the promotional increase within the standards stated in this policy. The decision regarding a promotional increase will reflect the promoted employee's experience and qualifications in comparison with other employees' backgrounds in the same job.

### **Effects of Demotion**

When an employee is demoted to a lower position, the employee will be paid at a rate, which is within the approved range for the lower position. The rate of pay will be recommended by the Director of Human Resources and approved by the Executive Director taking into consideration the circumstances and reasons for the demotion. An employee who has not completed six months in the previous position prior to demotion will be required to serve six months in the position to which he/she was demoted before being eligible for further promotion.

When an employee requests a demotion to a lower position and performance is not an issue in the request, the employee will be paid at a rate that is within the approved range for the lower position. In no case can the rate be higher than the employee was making prior to demotion. In considering the appropriate salary level in a requested demotion, a suggestion, but not requirement, would be that the amount of decrease would be the percentage interval difference between the old and new grades. The rate of pay will be recommended by the Director of Human Resources and approved by the Executive Director.

## METROPOLITAN LIBRARY SYSTEM

### INSTRUCTIONS FOR AUTHORIZATION FOR PAYROLL DIRECT DEPOSIT

1. If you sign up for the direct deposit, each payday your payroll checks and flexible benefit reimbursement checks (if there is one) will be electronically deposited to your bank account.
2. You cannot make direct deposit for only a portion of your paycheck. However, the payroll deduction for credit union is still available. This means you can utilize the payroll deduction to do a partial deposit to credit union and have the rest of the paycheck be directly deposited to another bank.
3. Direct deposit employees use mlsHRPAY "Payday Info" to print their own pay stubs.
4. Depository Name is the name of your bank. Your depository must be a member of the Automatic Clearing House (ACH). Call your depository if you are not sure.
5. Transit/ABA No. and Account No. are the encoded numbers on the bottom of your check. Since you will be attaching a **VOID check** to this document, you may leave those blank. The Business Office staff will enter this information directly from your check. **A deposit slip will not be accepted because the information on a deposit slip is not always correct.**
6. If you only use a debit card (no checks available), the bank gives you a paper card to use that has on it their routing number and your account number – **or** - they give you some other form of paperwork with those numbers. Please attach a copy of the paper card (not the debit card) or a copy of the paperwork.
7. Print your name and social security number at the bottom in the space provided. Be sure to sign and date the form. Indicate if this is a new authorization or a change of your previous information.
8. Return this form to the Business Office. Allow one to two payroll periods for the direct deposit or the change of information to go into effect. If the direct deposit is not in effect after two payroll periods, please call payroll to verify the status.
9. Please call Sylvia Lawson (606-3793) for any questions concerning the direct deposit.

METROPOLITAN LIBRARY SYSTEM  
AUTHORIZATION FOR PAYROLL DIRECT DEPOSIT

I hereby authorize my employer, Metropolitan Library System, to initiate credit entries and to initiate, if necessary, debit entries and adjustments for any credit entries in error to my Checking account indicated below and the depository named below to credit and /or debit the same to such account.

DEPOSITORY NAME \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TRANSIT/ABA NO. \_\_\_\_\_ ACCOUNT NO. \_\_\_\_\_

CHECKING ACCOUNT ONLY

(ATTACH A **VOIDED CHECK** IN THIS SPACE PROVIDED)

I understand that I may terminate this agreement by giving written notice to my employer. I may give such termination notice at any time, but must allow my employer a reasonable time after receipt to act upon it.

Name: \_\_\_\_\_ SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
(Print or type, Last name first)

Signed: \_\_\_\_\_ DATE \_\_\_\_\_

New Authorization \_\_\_\_\_

Change Authorization \_\_\_\_\_

The agreement is in accordance with the rules and operating procedure of the Mid-America Payment Exchange, as now in effect or hereafter Modified.

# SH 110 Salary Administration

## SH 110.1 Classification Plan

*Adopted: 9/00; Revised: 1/08*

<b>Salary Grade</b>	<b>Job Title</b>
00 - Part-Time	Associate Librarian Circulation Clerk Custodian Extension Specialist Librarian Library Page Materials Services Division Technician Project Specialist Security Officer Technology Assistant
50	Technical Processor
51	Mail Technician Receiving Technician
52	Administrative Receptionist Cataloging Technician Circulation Clerk Data Entry Technician Graphic Design Technician Interlibrary Loan Technician Materials Selection Technician Serials Technician Technology Assistant
53	Administrative Secretary Book Center Coordinator Circulation Control Technician Delivery Driver Conference Service Technician Maintenance Technician I
54	Accounting Technician Accounts Payable Technician Administrative Receptionist Administrative Specialist Computer Operator Extension Specialist IT Technician I Library Assistant Outreach Assistant Outreach Specialist Planning Services Specialist Surveillance Systems Technician

55	Associate Cataloger Associate Librarian Benefits Specialist Development Specialist Executive Assistant Human Resources Specialist Maintenance Technician II Marketing/Communications Assistant Materials Selection Assistant Purchasing Specialist Special Collections Assistant Sr. Accounting Technician
56	Cataloger Communications Specialist Community Information Coordinator Government Documents Cataloger Graphic Designer Librarian Project Coordinator Researcher Senior Services Coordinator IT Technician II Technical Processing Manager Television Programming Coordinator
57	Assistant Library Manager Children Services Coordinator Computer Operations Supervisor Security Officer Young Adult Services Coordinator
58	Accounting Manager Employee Development Coordinator Employment Manager Facility Project Manager IT Manager Library Manager I Marketing & Communications Assistant Manager Materials Selector Purchasing Officer Security Manager Volunteer Coordinator Webmaster
59	Benefits Manager Cataloging Manager Library Manager II Materials Selection Manager

60	Marketing & Communications Manager Headquarters Manager
61	
62	Director of Library Operations Director of Construction Management Director of Development Director of Facilities Maintenance Director of Human Resources Director of Information Technology Director of Outreach Services
63	Deputy Executive Director/Finance & Supp Deputy Executive Director/Library Operations Deputy Executive Director/Materials & Outreach Deputy Executive Director/Technology
99	Coordinator – Friends of the MLS Executive Director P-T Coordinator of the Friends of MLS

# SH 110 Salary Administration

## SH 110.2 – Compensation Schedule

*Adopted: 12/00, Revised: 1/08*

<b>Grade</b>		<b>Minimum</b>	<b>Midpoint</b>	<b>Maximum</b>
<b>50</b>	<b>Hourly</b>	<b>8.43</b>	<b>10.17</b>	<b>11.90</b>
	Biweekly	674.40	813.60	952.00
	Annual	17,534.40	21,153.60	24,752.00
<b>51</b>	<b>Hourly</b>	<b>9.36</b>	<b>11.28</b>	<b>13.19</b>
	Biweekly	748.80	902.40	1,055.20
	Annual	19,468.80	23,462.40	27,435.20
<b>52</b>	<b>Hourly</b>	<b>10.28</b>	<b>12.41</b>	<b>14.51</b>
	Biweekly	822.40	992.80	1,160.80
	Annual	21,382.40	25,812.80	30,180.80
<b>53</b>	<b>Hourly</b>	<b>11.82</b>	<b>14.26</b>	<b>16.68</b>
	Biweekly	945.60	1,140.80	1,334.40
	Annual	24,585.60	29,660.80	34,694.40
<b>54</b>	<b>Hourly</b>	<b>13.61</b>	<b>16.40</b>	<b>19.17</b>
	Biweekly	1,088.80	1,312.00	1,533.60
	Annual	28,308.80	34,112.00	39,873.60
<b>55</b>	<b>Hourly</b>	<b>15.63</b>	<b>18.86</b>	<b>22.05</b>
	Biweekly	1,250.40	1,508.80	1,764.00
	Annual	32,510.40	39,228.80	45,864.00
<b>56</b>	<b>Hourly</b>	<b>17.22</b>	<b>20.77</b>	<b>24.30</b>
	Biweekly	1,377.60	1,661.60	1,944.00
	Annual	35,817.60	43,201.60	50,544.00
<b>57</b>	<b>Hourly</b>	<b>18.93</b>	<b>22.83</b>	<b>26.72</b>
	Biweekly	1,514.40	1,826.40	2,137.60
	Annual	39,374.40	47,486.40	55,577.60
<b>58</b>	<b>Hourly</b>	<b>22.44</b>	<b>27.04</b>	<b>31.67</b>
	Biweekly	1,795.20	2,163.20	2,533.60
	Annual	46,675.20	56,243.20	65,873.60
<b>59</b>	<b>Hourly</b>	<b>24.43</b>	<b>29.48</b>	<b>34.50</b>
	Biweekly	1,954.40	2,358.40	2,760.00
	Annual	50,814.40	61,318.40	71,760.00

<b>Grade</b>		<b>Minimum</b>	<b>Midpoint</b>	<b>Maximum</b>
<b>60</b>	<b>Hourly</b>	<b>26.66</b>	<b>32.13</b>	<b>37.62</b>
	Biweekly	2,132.80	2,570.40	3,009.60
	Annual	55,452.80	66,830.40	78,249.60
<b>61</b>	<b>Hourly</b>	<b>30.05</b>	<b>36.21</b>	<b>42.41</b>
	Biweekly	2,404.00	2,896.80	3,392.80
	Annual	62,504.00	75,316.80	88,212.80
<b>62</b>	<b>Hourly</b>	<b>32.43</b>	<b>39.12</b>	<b>45.81</b>
	Biweekly	2,594.40	3,129.60	3,664.80
	Annual	67,454.40	81,369.60	95,284.80
<b>63</b>	<b>Hourly</b>	<b>34.95</b>	<b>42.14</b>	<b>49.33</b>
	Biweekly	2,796.00	3,371.20	3,946.40
	Annual	72,696.00	87,651.20	102,606.40



## SH 110.3 - Part-Time Compensation Schedule

*Adopted: 12/00, Revised: 1/08*

Position	Minimum	Midpoint	Maximum
Page	8.17	9.84	11.54
Custodians	8.43	10.17	11.90
Materials Services Division Technician	10.28	12.41	14.51
Security Officer	18.93	22.83	26.72
Technical Assistant	10.28	12.41	14.51
Project Specialist	22.22	-	-

# PAYROLL SCHEDULE FY 08-09

Pay- Roll #	PAYDAY*	BI-WEEKLY PAY PERIOD		Lock Time Sheet By 10:00 A.M. on this day		Time Sheets Due **
1	7/3/2008	6/16/2008 thru	6/29/2008	Monday	6/30/2008	6/27/2008
2	7/17/2008	6/30/2008 thru	7/13/2008	Monday	7/14/2008	7/11/2008
3	7/31/2008	7/14/2008 thru	7/27/2008	Monday	7/28/2008	7/25/2008
4	8/14/2008	7/28/2008 thru	8/10/2008	Monday	8/11/2008	8/8/2008
5	8/28/2008	8/11/2008 thru	8/24/2008	Monday	8/25/2008	8/22/2008
6	9/11/2008	8/25/2008 thru	9/7/2008	Monday	9/8/2008	9/5/2008
7	9/25/2008	9/8/2008 thru	9/21/2008	Monday	9/22/2008	9/19/2008
8	10/9/2008	9/22/2008 thru	10/5/2008	Monday	10/6/2008	10/3/2008
9	10/23/2008	10/6/2008 thru	10/19/2008	Monday	10/20/2008	10/17/2008
10	11/6/2008	10/20/2008 thru	11/2/2008	Monday	11/3/2008	10/31/2008
11	11/20/2008	11/3/2008 thru	11/16/2008	Monday	11/17/2008	11/14/2008
12	12/4/2008	11/17/2008 thru	11/30/2008	Monday	12/1/2008	11/26/2008 <i>Wed</i>
13	12/18/2008	12/1/2008 thru	12/14/2008	Monday	12/15/2008	12/12/2008
14	12/31/2008 ( <i>Wed</i> )	12/15/2008 thru	12/28/2008	<i>Friday</i>	12/26/2008	12/23/2008 <i>Tue</i>
15	1/15/2009	12/29/2008 thru	1/11/2009	Monday	1/12/2009	1/9/2009
16	1/29/2009	1/12/2009 thru	1/25/2009	Monday	1/26/2009	1/23/2009
17	2/12/2009	1/26/2009 thru	2/8/2009	Monday	2/9/2009	2/6/2009
18	2/26/2009	2/9/2009 thru	2/22/2009	Monday	2/23/2009	2/20/2009
19	3/12/2009	2/23/2009 thru	3/8/2009	Monday	3/9/2009	3/6/2009
20	3/26/2009	3/9/2009 thru	3/22/2009	Monday	3/23/2009	3/20/2009
21	4/9/2009	3/23/2009 thru	4/5/2009	Monday	4/6/2009	4/3/2009
22	4/23/2009	4/6/2009 thru	4/19/2009	Monday	4/20/2009	4/17/2009
23	5/7/2009	4/20/2009 thru	5/3/2009	Monday	5/4/2009	5/1/2009
24	5/21/2009	5/4/2009 thru	5/17/2009	Monday	5/18/2009	5/15/2009
25	6/4/2009	5/18/2009 thru	5/31/2009	Monday	6/1/2009	5/29/2009
26	6/18/2009	6/1/2009 thru	6/14/2009	Monday	6/15/2009	6/12/2009

\* Payday is on Thursday unless otherwise noted.

\*\* Timesheets due on Friday unless otherwise noted.

**2008 LIBRARY HOLIDAY AND CLOSING SCHEDULE**F-T Workweek**Workweek of December 24 – December 30, 2007**

Sun., December 30, 2007 - Libraries Closed

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**2008 Library Holiday and Closing Schedule****Workweek of December 31, 2007 – January 6, 2008 (New Year's)** 32

Mon., December 31, 2007 – Libraries Close at 6 p.m. except DN @ 5 p.m.

Tues., January 1, 2008 - Libraries Closed – **Paid Holiday****Workweek of January 21 - 27, 2008 (Martin Luther King, Jr. Day)** 32Mon., January 21, 2008 - Libraries Closed - **Paid Holiday****Workweek of March 17 - 23, 2008 (Easter Week)** 40

Sun., March 23, 2008 - Libraries Closed

**Workweek of May 19 – 25, 2008 (Memorial Day Weekend)** 40

Sun., May 25, 2008 - Libraries Closed

**Workweek of May 26 – June 1, 2008 (Memorial Day)** 32Mon., May 26, 2008 - Libraries Closed – **Paid Holiday****Workweek of June 30 – July 6, 2008 (Independence Day)** 32Fri., July 4, 2008 – Libraries Closed – **Paid Holiday****Workweek of August 24 – 31, 2008 (Labor Day Weekend)** 40

Sun., August 31, 2008 - Libraries Closed

**Workweek of September 1– 7, 2008 (Labor Day)** 32Mon., September 1, 2008 – Libraries Closed - **Paid Holiday****Workweek of October 13 - 19, 2008, (Staff Development Day)** 40

Mon., October 13, 2008 – Libraries Closed

**Workweek of November 24 - 30, 2008 (Thanksgiving Period)** 24

Wed., November 26, 2008 - Libraries Close at 6 p.m.

Thurs., November 27, 2008 - Libraries Closed - **Paid Holiday**Fri., November 28, 2008 - Libraries Closed - **Paid Holiday****Workweek of December 15 - 21, 2008 (Christmas Period)** 40

Sun., December 21, 2008 – Libraries Closed

**Workweek of December 22 - 28, 2008 (Christmas Period)** 24Wed., December 24, 2008 - Libraries Closed - **Paid Holiday**Thurs., December 25, 2008 – Libraries Closed - **Paid Holiday**

Sun., December 28, 2008 – Libraries Closed

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**2009 Library Holiday and Closing Schedule****Workweek of December 29, 2008 - January 4, 2009 (New Year's)** 32

Wed., December 31, 2008 – Libraries Close at 6 p.m. except DN @ 5 p.m.

Thurs., January 1, 2009 - Libraries Closed – **Paid Holiday**

For workweeks with one holiday, libraries and offices will be open their normal schedule with the exception of that holiday; however, full-time employees should be scheduled to work only 32 hours during the week. Employees eligible for partial holiday pay should be prorated accordingly.

For workweeks with two holidays, libraries and offices will be open their normal schedule with the exception of those two holidays; however, full-time employees should be scheduled to work only 24 hours during the week.

Employees eligible for partial holiday pay should be prorated accordingly.

## METROPOLITAN LIBRARY SYSTEM

### HOLIDAY POLICY

1. Current policy grants full-time and designated FTE (budget account 101) staff nine paid holidays per calendar year plus two "floating holidays" (when the libraries are normally open) to be scheduled by the individual employee subject to rules listed in the leave policies under floating holidays.
2. Full-time employees normally work forty hours within a seven-day period known as a workweek.
3. The calendar workweek begins on Monday and ends on Sunday; in a week when a paid holiday is scheduled, the full-time employee's workweek is thirty-two hours rather than forty. When two paid holidays fall during the same week, the full-time employee's workweek is twenty-four hours. Less than full-time employees receive a prorated amount of holiday hours under the provision of category 2 and 3 employees in leave policies.
4. New employees or employees promoting or otherwise moving into category 1, 2, or 3 status will be eligible for paid holidays providing the effective date of employment or other action falls on or prior to the holiday. An employee hired effective the day following a paid holiday or an employee whose status changes the day following a paid holiday will not receive pay for the holiday.
5. An employee on leave without pay status on both the last work day prior to the holiday and the first work day following the holiday will not receive pay for the holiday.
6. Employees terminating employment are required to report to and work the last day and therefore are not eligible to end their employment on a paid holiday or floating holiday. Service terminates with the last day of work regardless of whether there is an annual leave balance to be paid off.
7. If a holiday falls within a period of annual vacation leave, sick leave or other form of paid leave, leave time will not be charged for the holiday.
8. If an employee is required to work on a paid holiday because of weather conditions, equipment change-overs or malfunctions, or other situation, the employee will receive equivalent time off at the earliest practical time within the same work week. If it is known that work will be required on a holiday prior to the date, the in lieu time can be given in advance. Under this situation, should for some reason the employee not work on the actual holiday, the time would need to be charged to annual vacation leave, floating holiday or, in the case of illness, sick leave. If no leave were available or applicable, the time would become leave without pay. If equivalent time off in the same workweek is not possible, a non-overtime exempt employee would receive time-and-one-half pay for the holiday.

# **SH 100 Wages and Hours**

## **SH 120 Hours: Overtime; Breaks; Meal Periods**

***Adopted: 6/85, Revised: 7/88, 8/91, 10/95, 2/03***

### **Background and Purpose**

In 1976, the United States Supreme Court declared state and local governmental entities exempt from the provisions of the Fair Labor Standards Act (FLSA) as amended in 1974. In February 1985, the Court reversed itself and declared that state and local government units are under the regulations of the FLSA by virtue of the "commerce clause" of the United States Constitution. In November 1985, the Act was amended providing certain relief to local governmental agencies.

Among other provisions, the FLSA requires covered employees to be paid 1.5 times the regular rate of pay for hours worked over 40 in a defined workweek or compensated by 1.5 hours off for each hour worked over 40.

This document incorporates details on break times, etc., to amplify all earlier policy statements adopted by the Metropolitan Library Commission.

### **Definitions**

Full-time employee is an employee of the system who can regularly expect 40 hours of work per week and who in turn is expected to work a full 40 hours per week unless on authorized leave. Full-time employees are budgeted in Account 101.

Designated full-time equivalent employee is an employee of the system who can regularly expect a designated number of hours, normally 20 or 30 (designated half-time or three-quarter-time), and who in turn is expected to work the designated number of hours per week unless on authorized leave. Designated full-time equivalent (FTE) employees are normally budgeted in Account 101.

Part-time employee is an employee of the system who is hired on an as needed hourly basis not to exceed 32 hours per week\* and which may or may not vary from one week to the next based on system need. Accordingly, a part-time employee should not have a reasonable expectation of a fixed number of hours. Hours may be indicated as "generally so many per week" but no guarantee of fixed or designated number of hours is intended or implied. Part-time hours are not designated by fractions of full-time employees (FTEs) for budget purposes; but are instead included in the overall total number of part-time hours available in Account 102.

Temporary employee is an employee of the system whose term of employment for whatever reason is expected to last less than a total of 960 hours in both any calendar and fiscal year. A temporary employee can work on a 40 hour per week or less basis,

# **SH 100 Wages and Hours**

## **SH 120 Hours: Overtime; Breaks; Meal Periods**

***Adopted: 6/85, Revised: 7/88, 8/91, 10/95, 2/03***

thereby being full-time, designated part-time or part-time in status. Temporary employees include seasonal employees hired to provide services during a period of seasonal activity such as the summer.

Exempt status is the recognized FLSA standing of those employees of the system who meet the criteria of executive, administrative or professional categories as defined by the Secretary of Labor and identified by the library system's Executive Director.

Covered status is the recognized FLSA standing of those employees of the system who do not meet the criteria for exemption as defined by the Secretary of Labor, or those who do but who the library system opts not to exempt.

Minimum wage is the hourly rate of compensation as established by the FLSA.

Time and one half is the employee's regular hourly rate multiplied by 1.5 for purposes of overtime compensation. (Unless defined otherwise by the FLSA).

## **Policies**

1. No employee is compensated at a rate less than the minimum wage established by law.
2. All FLSA covered employees are compensated at a rate of time-and-one-half for any time worked in excess of 40 hours per week.
3. All employees, for the purpose of public accountability, are charged applicable paid leave or leave without pay for being off work at times normally required to be on the job.
4. The established workweek for the library system is from 12:01 a.m. on Monday through 12 midnight on Sunday of each week.
5. Time sheets indicating hours and days worked will be completed by all employees except those specifically excluded by the Executive Director and otherwise exempt under the law.
6. Any employee scheduled to work in excess of four continuous hours in any one day is entitled to a rest break of 15 minutes duration for each four-hour work period, granted as closely to the midpoint of the scheduled work hours as is practical given staffing considerations. This rest break time is "on the clock" and considered as paid time. Employees are expected to remain at the work site and are subject to interruption and recall to work duties during paid rest breaks when required by staffing levels and/or unusual conditions. Rest break time is not cumulative within a workday or between

# **SH 100 Wages and Hours**

## **SH 120 Hours: Overtime; Breaks; Meal Periods**

***Adopted: 6/85, Revised: 7/88, 8/91, 10/95, 2/03***

workdays nor can it be used to allow for late arrival or early departure or to extend meal breaks.

7. Any employee scheduled to work in excess of six continuous hours (including rest break time) in any one day will take a break of no less than 30 minutes. This meal break is "off the clock" and not considered to be paid work time. The employee is to be released from all work duties during this meal break and not permitted to do work for the benefit of the library system. In preparing work schedules, supervisors may determine, based on staffing levels and hours of operation, the length of meal breaks to be scheduled for employees. During a meal break period, an employee is free to leave the work site or to remain on-site provided he/she does not engage in work benefiting the library system. An employee who is interrupted during a meal break of 30 minutes and required or allowed to return to work prior to the expiration of the scheduled meal break will be compensated for the entire period as though he/she was on the job for the entire period. An employee who is interrupted during a meal break of more than 30 minutes and required to or allowed to return to work after the expiration of at least 30 minutes will be compensated for the amount of time actually worked. The supervisor is required to monitor precisely and adjust the employee's schedule so as to avoid an overtime situation. A minor (i.e., under the age of 16) is to be scheduled for a one-hour meal break and is expected to take this full amount of time on any day when scheduled to work eight hours (including rest break time).
8. All such records as required by the FLSA are prepared and maintained to comply with its provisions.

In any circumstances in which this policy and the Fair Labor Standards Act are in conflict, the Act pre-empts this policy.

# **SH 120 Hours**

## **SH 120.1 – Administrative Procedures: Wages and Hours; Overtime Pay**

*Revised: 12/06*

These procedures implement the policy of the Metropolitan Library Commission insuring compliance with the Fair Labor Standards Act.

### **Procedure**

#### **1. Reporting of Hours**

Unless exempt and excluded by the Executive Director, every employee will, at the end of each pay period, complete a time record, sign it and submit it to his or her supervisor, who will certify its accuracy and transmit it to the Business Office in a timely manner as prescribed by that office.

#### **2. Requesting and Reporting Overtime**

- A. Normally, if a supervisor anticipates an overtime situation during a given week, schedules should be adjusted to offset this time within the same work week (defined as 12:01 a.m. Monday through 12 midnight Sunday) for the person or persons performing the work. This is a routine supervisory procedure requiring no approval by superiors.
- B. In a situation requiring overtime for which no schedule adjustment is possible within the same work week, the supervisor will notify the appropriate Ad Team level administrator of the circumstances as soon as possible. Immediately after such overtime has been performed, the supervisor will report to the same administrator the actual overtime hours worked. The memorandum, bearing the endorsement of the administrator, is submitted to the Business Office and then authorizes payment of the overtime in the first possible pay period.

#### **3. Identification of Exempt Employees**

Within the guidelines provided by the U.S. Secretary of Labor, the Executive Director has identified the following positions as exempt from overtime provisions:

- Accounting Manager
- Assistant Manager of Library Operations
- Benefits Manager
- Cataloging Manager
- Children's Services Coordinator
- Computer Operations Supervisor
- Coordinator of the Friends of MLS
- Deputy Executive Director/Library Operations



# SH 120 Hours

## SH 120.1 – Administrative Procedures: Wages and Hours; Overtime Pay

*Revised: 12/06*

Deputy Executive Director/Materials & Outreach  
Deputy Executive Director/Technology  
Director Executive Director/Finance & Support  
Director of Library Operations  
Director of Construction Management  
Director of Development  
Director of Facilities Maintenance  
Director of Human Resources  
Director of Information Technology  
Director of Outreach Services  
Employee Development Coordinator  
Employment Manager  
Executive Director  
Headquarters Manager (HQM)  
IT Manager  
Manager of Library Operations I  
Manager of Library Operations II  
Marketing & Communications Manager  
Marketing and Communications Assistant Manager  
Materials Selection Manager  
Purchasing Officer  
Technical Processing Manager  
Volunteer Coordinator  
Webmaster  
Young Adult Services Coordinator

### 4. Identification of Employees Excluded from Time Record Reporting

Employees in the positions designed as exempt in Provision 3 above are also identified and designated as those excluded from completion of time sheets.

Employees in positions identified as exempt in Procedure 3 above will be subject to the following provisions:

- Deduction will be made when the employee is absent from work for personal reasons other than sickness or accident. Deductions will be made only after the employee has exhausted his or her leave balance. If the employee is absent for less than a day, he or she must be paid for the full day.
- Deductions will be made for absences caused by sickness or disability (including industrial accidents). Deductions will be made only after the employee has exhausted his or her accrued leave balances. If the employee is absent for less than a day, he or she must be paid for the full day.

# **SH 120 Hours**

## **SH 120.1 – Administrative Procedures: Wages and Hours; Overtime Pay**

*Revised: 12/06*

- In cases where the Family and Medical Leave Act apply, pay will be deducted for absences of less than one full day. Deductions will be made only after the employee has exhausted his or her accrued leave balances.
- Suspensions (imposed leave without pay) imposed in good faith for infractions of significant safety rules do not affect the employee's salaried status.
- An exempt employee need not be paid his or her full weekly salary during the first and/or last weeks of employment. The salary will be prorated based on the number of days actually on the payroll.

# **SH 200 Benefits**

## **SH 210 Retirement Policy**

*Revised: 5/88, 12/02, 7/06*

### **Background**

The Metropolitan Library System Pension Plan (the Plan) was established in 1969 under Section 560, Title 65 of Metropolitan Library Act and is managed by a self-insured trust. The purpose of the Plan is to give long-term library employees a retirement income over and above the Social Security Retirement Pension. In 1998, the Internal Revenue Service (IRS) issued a favorable determination letter recognizing the Plan as a governmental plan. Therefore, the Plan is not subject to the provisions of Employee Retirement Income Security Act of 1974 (ERISA), nor are benefits insured or guaranteed by the Pension Benefit Guaranty Corporation (PBGC).

On March 28, 1983, The Metropolitan Library Commission appointed a Board of Administrators for the Plan (Library Retirement Pension Board). The Pension Board has the responsibility for the management of the Pension Fund and has the responsibility for reviewing the Plan and reporting on its status to the Library Commission annually. The Pension Board consists of the three officers of the Library Commission and three designated Library System staff positions.

The library system operates two retirement plans: a Defined Benefit plan for those individuals who were under said plan prior to August 29, 2005 and opted to remain under the Defined Benefit plan. The second plan, a Defined Contribution plan, became effective on September 1, 2005 for all newly hired full-time employees and for those who opted to change from the Defined Benefit plan.

The operations of both plans are controlled by the plan documents adopted, and from time-to-time as may be amended, for each of the plans as determined by the Board of Administrators for the Plan (Library Retirement Pension Board).

### **Policy**

For Both Plans:

1. Employees eligible for participation in the Plans are those who are normally scheduled to work 40 hours per week in a salaried position. The participation of eligible employees is mandatory.
2. An employee is 100% vested to the Plans after five years of credited services.
3. The Plans offer several options regarding retirement date: normal retirement at age 65 with vested interest; early retirement at age 50 with at least 20 years credited service or age 62 with 5 years of service; late retirement at any age after 65 with vested interest.

# **SH 200 Benefits**

## **SH 210 Retirement Policy**

*Revised: 5/88, 12/02, 7/06*

For Defined Benefit Plan:

1. The normal monthly retirement benefit will be 2.5% of an employee's Average Monthly Earnings multiplied by years of credited service up to a maximum of 32 years. "Average Monthly Earnings" means the average of the employee's highest 60 consecutive completed calendar months of employment by the Library System
2. The early retirement benefit will be the greater of the actuarial equivalent of the employee's accrued benefit at normal retirement date or the aggregate value of the employee's participant contributions plus interest credited.
3. The late retirement benefits will be the greater of: (1) the normal retirement pension determined under the Plan, taking into account Service and Compensation credited after Normal Retirement Age; or (2) the Accrued Benefit, determined as of the later of Normal Retirement Age or the end of the prior Plan Year, actuarially adjusted for late retirement.

# **METROPOLITAN LIBRARY SYSTEM PENSION PLAN**

## **SUMMARY PLAN DESCRIPTION**

# METROPOLITAN LIBRARY SYSTEM PENSION PLAN

## Summary Plan Description

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# METROPOLITAN LIBRARY SYSTEM PENSION PLAN

## Summary Plan Description

This is a Summary Plan Description for Metropolitan Library System Pension Plan (the "Metropolitan Pension Plan").

This booklet contains information for you to better understand the Metropolitan Pension Plan.

This booklet is intended only as a summary of the Metropolitan Pension Plan's highlights and is not the complete Metropolitan Pension Plan document. If there are any inconsistencies between this booklet and the Metropolitan Pension Plan, the Metropolitan Pension Plan document shall govern.

The main purpose of the Metropolitan Pension Plan is to help you provide for your retirement.

\*\*\*\*\*

### PLAN DIRECTORY

Here are some important names, addresses, and other facts.

Plan Name and Number: The Plan name is Metropolitan Library System Pension Plan (referred to in this booklet as the "Metropolitan Pension Plan").

The Metropolitan Pension Plan plan number is 001.

The Metropolitan Pension Plan was effective as of July 1, 1969.

Employer: The Employer whose employees are covered by the Metropolitan Pension Plan is:

<u>Name</u>	<u>Business Address</u>	<u>Business Telephone No.</u>
<b>METROPOLITAN LIBRARY SYSTEM</b> ("Metropolitan")	131 Dean A. McGee Oklahoma City, OK 73102	(405)231-8605

Employer I.D. No.: 73-0747828.

Plan Type: Metropolitan Pension Plan is a defined benefit plan.

Administration: The administration of the Metropolitan Pension Plan is by contract.



Administrator: Metropolitan may appoint 1 or more persons as the Metropolitan Pension Plan Administrator ("Administrator"). If Metropolitan does not appoint an Administrator, the Metropolitan Library System Pension Board is the Administrator.

The current Administrator's business address and phone number are:

<u>Name</u>	<u>Business Address</u>	<u>Business Telephone No.</u>
<b>Metropolitan Library System</b>	131 Dean A. McGee Oklahoma City, OK 73102	(405) 231-8605

The Administrator provides you information about the Metropolitan Pension Plan and your benefits. The Administrator also files required information about the Metropolitan Pension Plan with the Internal Revenue Service and the Department of Labor.

Trustee: The Metropolitan Pension Plan Trustee (referred to in this booklet as "Trustee"), its name and address of its principal place of business are:

<u>Name</u>	<u>Address of Principal Place of Business</u>
<b>Bank of Oklahoma</b>	9520 North May Oklahoma City, OK 73120

Service Agent: The agent for service of legal process for the Metropolitan Pension Plan is:

<u>Name</u>	<u>Address Where Legal Process May be Served</u>
Director of Finance	131 Dean A. McGee Oklahoma City, OK 73102

Service of legal process may be made upon the Trustee or the Administrator.

## 1. **METROPOLITAN PENSION PLAN PARTICIPATION.**

- 1.1 Plan Year: The Plan Year is a 12-month period from July 1 to June 30. The fiscal records of the Metropolitan Pension Plan are maintained for each Plan Year. The results of the Metropolitan Pension Plan operations are determined as of the end of each Plan Year.
- 1.2 Metropolitan Pension Plan: The Metropolitan Pension Plan was established and is maintained by Metropolitan Library System. The Metropolitan Library System is the only Metropolitan Pension Plan sponsor.

1.3 When You Can Participate. When the Metropolitan Library System decides, you can participate in the Metropolitan Pension Plan (you will be scheduled or projected to work 40 or more hours per week).

1.4 Participation Information. The Administrator lets you know when you become a Participant. A participation form is provided for you to sign.

## 2. **METROPOLITAN PENSION PLAN CONTRIBUTIONS**

Metropolitan Pension Plan Benefits depend on contributions to the Metropolitan Pension Plan and the result of investment of those contributions.

2.1 Contributions. Your Contributions and Metropolitan Library System Contributions fund the Metropolitan Pension Plan benefits.

If you participated before November 1, 1984, you were required to contribute 5% of your Compensation to the Metropolitan Pension Plan up to November 1, 1984.

After November 1, 1984, you are required to contribute 3% of your Compensation until the earlier of (i) your separation from Service or (ii) your completing 32 Years of Service.

Your contributions are credited with interest at 3½% per annum prior to July 1, 1983 and 5% thereafter, compounded annually from the July 1 after your Contribution date until your actual Retirement Date.

## 3. **METROPOLITAN PENSION PLAN BENEFITS**

3.1 Contributions Investment. Your Contributions and the Metropolitan Contributions are transferred to the Trustee, who invests such Contributions to provide retirement benefits for you. The Trustee is authorized to invest Metropolitan Contributions in any legal investment.

3.2 Benefits Eligibility. To be eligible for benefits, you **must** be employed by Metropolitan for at least 5 years in which you complete at least 1,000 Hours of Service.

You (or your Beneficiary) are entitled to:

A. Normal retirement benefits when you are age 62 and complete 5 years of participation;

B. Late retirement benefits when you retire after age 62;

C. Early retirement benefits when you retire after age 50 and complete 20 Years of Credited Service before age 62;

- D. Death benefits when you die;
- E. Disability benefits when you become disabled; or,
- F. Termination benefits when you terminate employment before age 62 other than for death, disability, or early retirement (your benefit payment is deferred until you are age 62).

### 3.3 Benefit Amounts.

- A. Your normal retirement benefit is 2½% of your average monthly compensation times your Years of Credited Service, up to a maximum of 32 years (unless limited by the Internal Revenue Code);
- B. Your late retirement benefit is the greater of (i) your normal retirement benefit, taking into account your Years of Credited Service and Compensation after age 62 or (ii) your normal retirement benefit adjusted to your late retirement date;
- C. Your early retirement benefit is the greater of (i) your normal retirement benefit adjusted to your early retirement date or (ii) your Contributions with interest credited to your date of termination;
- D. Your death benefit is the greater of (i) your normal retirement benefit adjusted to your date of death or (ii) your Contributions with interest credited to your date of termination;
- E. Your disability benefit is the greater of (i) your normal retirement benefit adjusted to your date of disability or (ii) your Contributions with interest credited to your date of termination. (You receive credit for your Service, if any, after disability.); or
- F. Your termination benefit is (i) your normal retirement benefit adjusted to your termination date (paid after you attain age 62) or (ii) your Contribution with interest to your termination.

If you elect to defer receipt of your vested benefit after your termination, you may receive your benefit starting at your age 62 or your early retirement date if you are eligible and so elect.

If you are eligible for a benefit, you may elect to withdraw your Contributions with interest thereon; however, you then forfeit all other benefits from the Metropolitan Pension Plan.

3.4 Distribution Options. You (or your Beneficiary) may elect your benefit as a:

- A. Life Annuity which is a monthly payment of a fixed amount for your Life.
- B. Life Annuity Certain which is a monthly payment of a fixed amount for for 10 years. If you die within the 10-year period, the payments continue to your Beneficiary.
- C. Joint and Survivor Annuity is a monthly payment of a fixed amount for your life and 50% or 100% of that amount for your spouse's life, whichever ends last.

Benefits may be paid in a form of a nontransferable annuity contract.

3.5 Beneficiary Designation. You must designate a Beneficiary to receive any benefits payable on or after your death. Benefits due at your death are paid to your surviving spouse unless you do not have a surviving spouse or your surviving spouse has consented, in writing, to another beneficiary. If you do not name a beneficiary or your Beneficiary dies before you, your death benefit is distributed to your spouse; if none, then equally among your children, both natural and adopted; if none, then to your estate.

Check with the Administrator for the form you use to designate your Beneficiary.

3.6 Benefits Nontransferability. Generally,

- A. you cannot transfer any part of your benefits by sale, pledge, gift or otherwise and
- B. your creditors cannot attach or garnish your benefits; however, the Administrator may be required to use some or all of your benefits to pay alimony, child support, or other transfer of assets directly to your spouse, former spouse, child or other dependent if required to do so by a proper court order.

#### 4. OTHER INFORMATION

4.1 Metropolitan Pension Plan Amendment/Termination.

Metropolitan may amend or terminate the Metropolitan Pension Plan at any time. Except in limited circumstances, Metropolitan does not have the power to (i) amend the Metropolitan Pension Plan to cause Metropolitan Pension Plan assets to be diverted to purposes other than for the exclusive benefit of Participants or their Beneficiaries (or reasonable expenses of administering Metropolitan Pension Plan) or (ii) amend Metropolitan Pension Plan

retroactively to deprive any Participant or Beneficiary of any benefit prior to the amendment.

4.2 Divorce.

Your plan benefits generally may not be assigned or transferred. There is an exception for certain "Qualified Domestic Relations Orders" ("QDRO"). A QDRO is a court order, judgment or decree that creates or recognizes the existence of the rights of someone other than you in your benefit. The other person is referred to as an "alternate payee" and must be your spouse or former spouse or child. If a QDRO is issued to the Metropolitan Pension Plan for your benefit, the Metropolitan Pension Plan is required to recognize the rights of your alternate payee to a part or all of your benefit. The Administrator establishes procedures to determine whether any Order qualifies as QDRO.

4.3 Claims. Your benefits should be paid to you or your beneficiary (if you die). If you are not paid benefits when they are due, you (or your duly authorized representative) should file a Claim. A Claim is a written request for a benefit by you or your Beneficiary.

4.4 Claim Denial. The Administrator will send you a written notice if your Claim is denied; the written notice will tell you -

- A. The specific reason or reasons for denial of your Claim,
- B. Specific plan provisions on which your Claim is denied,
- C. A description of any additional material or information necessary for you to perfect your Claim and an explanation of why such material or information is necessary, and
- D. An explanation of the Metropolitan Pension Plan claim review procedure.

4.5 Claim Review Procedure. If your Claim is denied, you (or your duly authorized representative) must make written application to the Administrator to review the denial of your Claim; your application must be received by the Administrator within 60 days after the Administrator has mailed the written notice that your Claim is denied, unless the Administrator has extended the time for filing your application. You may review pertinent documents and submit issues and comments in writing in appeal of the denial of your Claim.

Within 90 days (unless special circumstances require additional time, but not more than 180 days) after the receipt of your written application for review of the denial of your Claim by the Administrator, the Administrator will give you a written decision on your application.

If your claim for disability benefits is denied, within 45 days (unless special circumstances require additional time, but not more than 105 days) after the receipt of your written application for review of the denial of your claim by the Administrator, the Administrator will give you a written decision on your application.

Special rules apply for certain judgments, orders, decrees issued, and settlement agreements entered into for offset of a Participant's benefits.

#### 4.6 Statement of Employee Retirement Income Security Act Rights.

As a Participant in the Metropolitan Pension Plan, you are entitled to certain rights and protections under the Employee Retirement Income Security Act of 1974 ("ERISA"). ERISA provides that all participants shall be entitled to:

- (1) Examine, without charge, at the Administrator's office, all Metropolitan Pension Plan documents, including insurance contracts, collective bargaining agreements and copies of all documents filed by the Metropolitan Pension Plan with the U.S. Department of Labor, such as annual reports and plan descriptions.
- (2) Obtain copies of all Metropolitan Pension Plan documents and other Plan information upon written request to the Administrator. The Administrator may make a reasonable charge for the copies.
- (3) Obtain a statement telling you whether you have a right to receive a benefit at Normal Retirement Age (age 62) and, if so, what your benefits would be at Normal Retirement Age if you stop working. If you do not have a right to a benefit, the statement will advise you of the number of additional years you must work to receive a retirement benefit. You must request this statement in writing. The law does not require the Plan Administrator to give this statement more than once a year. The Metropolitan Pension Plan must provide the statement free of charge.

In addition to creating rights for Metropolitan Pension Plan Participants, ERISA imposes obligations upon the persons who are responsible for the operation of the employee benefit plan.

The people who operate your Metropolitan Pension Plan, called "fiduciaries" of the Metropolitan Pension Plan, have a duty to do so prudently in the interest of you and other Metropolitan Pension Plan Participants and beneficiaries.

No one, including Metropolitan or any other person may fire you or otherwise discriminate against you in any way to prevent you from obtaining pension benefit or exercising your ERISA rights.

If your claim for a pension benefit is denied in whole or in part, you must receive a written explanation of the reason for the denial. You have a right to have the Metropolitan Pension Plan review and reconsider your claim.

By ERISA, there are steps you can take to enforce the above rights. For instance, if you request materials from the Metropolitan Pension Plan and do not receive them within 30 days, you may file suit in a Federal Court. In such a case, the Court may require the Administrator to provide the materials and pay you up to \$100 a day until you receive the materials, unless the materials were not sent because of reasons beyond the control of the Administrator.

If your claim for benefits is denied or ignored, in whole or in part, you may file suit in a State or Federal Court.

If the Metropolitan Pension Plan fiduciaries misuse the Metropolitan Pension Plan's money or if you are discriminated against for asserting your rights, you may seek assistance from the U.S. Department of Labor, or you may file a suit in a Federal Court. The Court will decide who should pay court costs and legal fees. If you are successful, the Court may order the person you have sued to pay these costs and fees. If you lose, the Court may order you to pay these costs and fees, for example, if it finds your claim is frivolous.

If you have any questions about your Metropolitan Pension Plan, you should contact the Plan Administrator.

If you have any questions about this statement or your ERISA rights, you should contact the nearest Area Office of the U.S. Labor-Management Services Administration, Department of Labor.

- 4.7 Other Information Available to You. This Summary Plan Description greatly reduces many provisions of the Metropolitan Pension Plan; the Metropolitan Pension Plan (not this Summary Plan Description) determines each Employee's rights in the Metropolitan Pension Plan. A copy of the Metropolitan Pension Plan is on file with the Administrator and is available for your inspection.
- 4.8 Non-English Information. This Summary contains a summary in English of your METROPOLITAN LIBRARY SYSTEM PENSION PLAN rights and benefits. If you have any difficulty in understanding any part of this booklet, contact METROPOLITAN LIBRARY SYSTEM PENSION BOARD, Administrator, at 131 Dean A. McGee, Oklahoma City, OK 73102. Office hours are from 7:30 a.m. to 5:00 p.m., Monday through Friday. You may also call the Administrator's office at (405)231-8605 for assistance.

- 4.9 Plan Insurance. The Metropolitan Pension Plan is not insured under Title IV of the Employee Retirement Income Security Act; the Metropolitan Pension Plan is not required to be so insured.



## **DEFERRED COMPENSATION through a 457 PLAN**

DEFERRED COMPENSATION, under Internal Revenue Code Section 457, is a tax-deferred supplemental retirement program that allows public employees to contribute a portion of their salary, before taxes, to a retirement account. Deferred compensation plans for public employees were established through legislation passed by Congress in 1978. The government's aim in establishing these tax-favored plans was to encourage workers to build their own financial security.

A deferred compensation program offers advantages that other types of savings plans do not offer.

### **Tax Advantages**

The primary benefit of the deferred compensation plan is that you postpone current federal income tax on 1) the amount you elect to contribute and 2) the earnings credited to your account until withdrawal. This is not the case with conventional savings plans (such as a "passbook" savings account) where your contributions, and most likely, the earnings, are subject to current taxation.

### **Payroll Deduction**

The payroll deduction feature of this plan provides a convenient way for you to establish a regular and long-term savings pattern. This type of consistent savings is the key to building financial security for yourself and your family.

### **Funding choices**

This supplemental retirement program offers several funding options for you to choose from in order to satisfy your long-term savings objectives. These options include:

Fixed Return Option - for participants seeking a degree of safety on their investment return.

The fixed option provides a guaranteed rate of return. Current interest rates are established to provide you a competitive return on your investment.

Variable Return Option - for participants willing to assume increased risk in exchange for a potentially higher rate of return.

The variable option does not guarantee investment earnings. The investment returns fluctuate based on changes in the securities market or as a result of shifting economic



## **What Nationwide Retirement Solutions is doing to make your retirement savings better!**

You have something special in your benefits package - your deferred compensation (DC) program. This tax-deferred program is an easy way to save for retirement because your contributions are payroll deducted.

Nationwide Retirement Solutions has recently announced some enhancements to the program. These innovations let you become involved whenever you want, wherever you want, in the way that's most convenient for you.

### **Easier access, better service**

When you visit [www.nrsretire.com](http://www.nrsretire.com), you'll find enrollment and deferral change capabilities, financial planning education and tools, fund performance and account information - all just a few keystrokes away. The website is fully secure, making contribution and allocation transactions and account maintenance safe, secure and easy.

If you prefer, you can call us at 1-877-NRSFORU to enroll, increase contributions, change allocations and update your personal information. At the other end of the toll-free number, there are knowledgeable retirement specialists at your disposal. It's a team that is standing by ready to serve you and answer your questions.

The Metropolitan Library System contracted with Nationwide Retirement Solutions because you deserve a benefits provider that works as hard as you do to make things better. These enhancements are just the beginning. Watch for more ways in which we will team up to make your DC program even better.

### **Want to know more?**

If you're ready to use tax-deferred dollars to save for retirement:

- Enroll by phone by calling 1-877-NRSFORU,
- Enroll online at [www.nrsretire.com](http://www.nrsretire.com), the Nationwide Retirement Solutions website,
- Or use the self-enrollment kit which is available from your employer

If you already participate in the program but want to:

- Adjust your allocations,
- Increase your contributions,
- Check your account balance and history,
- Change personal information,
- Know more about how the program is working for you...

Call 1-877-NRSFORU or visit [www.nrsretire.com](http://www.nrsretire.com), the Nationwide Retirement Solutions website.

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# **SH 200 Benefits**

## **SH 220 Employee Leave Policies**

*Revised: 12/02, 7/07*

### **(Eligibility Requirements: Rules, Regulations, Procedures)**

(Supersedes all previous Library Leave Policy statements.)

Library system employees become eligible for certain leave benefits following eligibility rules described in this Policy.

All leave benefits are potentially available to certain employees (defined below). Some leave programs are not available to other employees (defined below) or are provided at lesser (pro-rata) allocations.

Variables include payroll/budget status, number of hours regularly worked in a pay period and length of service.

### **Definitions**

#### Work week:

A seven-day period, beginning on a Monday and ending on a Sunday, during which a full-time employee must account for 40 hours.

#### Pay period:

Two consecutive workweeks based on pay schedules, during which a full-time employee must account for 80 hours.

#### Budget-Authorized Position:

As used here, any positions, generally full-time (but may be half time or other fraction), listed in terms of Full-Time Equivalents (FTE's) in the annual budget, ordinarily under Account 101- Salaries.

#### Category 1 Employee:

Generally, one who normally works a 40-hour week and an 80-hour pay period in a BUDGET-AUTHORIZED position. A Category 1 employee, more commonly known as a full-time (1.0 FTE) staff member, becomes eligible for all leave benefits, some types of leave upon employment and other types after waiting six months.

#### Category 2 Employee:

A Category 2 employee fills a BUDGET-AUTHORIZED position on a regular reduced work schedule of a fixed number of hours such as 20 or 30 hours per work week -- 40 or 60 hours per pay period -- and is more commonly known as a designated FTE, but in any case has budget-designated hours normally funded in account 101. Examples of Category 2 employees: three-fourths-time Circulation

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Clerk or half-time Librarian. A Category 2 employee becomes eligible for all leave benefits enjoyed by a Category 1 employee and follows the same waiting periods prescribed for such benefits; however, a Category 2 employee's leave allotments are in proportion to work hours; e.g., one-half, three-fourths, four-fifths, etc. of the amount of leave time granted to a Category 1 employee.

### Category 3 Employee:

A Category 3 employee does NOT occupy a BUDGET-AUTHORIZED position but, instead, is hired within a part-time hour allotment budgeted for each library agency or department; a Category 3 is more commonly known as a part-time employee and is ordinarily compensated from budget account 102 - Part-time Wages -- at an hourly rate. Some part-time employees work a regular schedule; others work a varying schedule from day-to-day or week-to-week, depending on supervisors' needs. Category 3 employees who regularly work between 40 and 59 hours per pay period are eligible AFTER THREE YEARS OF CONTINUOUS CREDITED SERVICE for half (.5) leave benefits; those who work 60 or more hours per pay period are eligible AFTER THREE YEARS OF CONTINUOUS CREDITED SERVICE for three/quarter (.75) leave benefits; however, Category 3 employees are not granted all of the system's leave benefits.

See the appropriate section of this document for details on which leave benefits are granted to which categories of employees, waiting periods, etc.

### Immediate Family:

Spouse, employee's and/or spouse's children, adopted children, foster children, full or "step" siblings, natural, adoptive or foster parents, natural, adoptive or foster grandparents and grandchildren including "step" grandchildren, wards or guardians."

## **General Rules Governing the Use of Leave**

Certain rules are universal; i.e., they apply to any leave of absence with pay or without pay taken during working hours; among the general rules are:

1. Except for emergencies, including illness, leave should be requested ahead of time.
2. A leave request must be submitted to one's supervisor ahead of scheduled leave and immediately after returning to work following unscheduled leave.  
UNAUTHORIZED ABSENCES ARE GROUNDS FOR DISMISSAL.
3. Scheduled leave, e.g., Annual Vacation Leave, doctor/dental appointments and the like, should be applied for as far in advance as possible to help insure adequate staffing. (Relief or substitute help is not ordinarily provided during vacation periods.)

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4. When entering leave, the requester must enter the exact amount, in hours, and, if a portion of an hour is involved, to the nearest 15 minutes, taken or expected to be taken. (Annual Vacation Leave, among other types of leave, is "rounded" to the nearest quarter hour.)
5. If an employee is off work on Annual Vacation Leave, Sick Leave or other leave, and his or her library building (work-place) is unexpectedly closed due to weather conditions or the like, the leave will still be charged to the employee.

## Summary of Leave Privileges and Qualifications Per Type of Leave and Category of Employee

### Annual Vacation Leave (AVL)

#### Category One (1) Employees:

Eligibility Period: 6 months

The eligibility period is not applicable to individuals moving from category 2 or 3 and it is waived for non-category 3 part-time employees who have five or more years of continuous service with the library system.

At that point, employee is credited with 48 hours (6 working days) of AVL, based on an earn rate of 8 hours per month. This earn rate, which equals 96 hours per year, continues until the employee has completed 5 years of service. The earn rate then increases each additional five years to the maximum shown below.

#### AVL EARN RATE CHART FOR CATEGORY 1 EMPLOYEES

YEARS OF EMPLOYMENT	HOURS/MINUTES OF AVL EARNED PER MONTH	HOURS OF AVL EARNED PER YEAR
1-5 years	8 hours	96 hours
6-10 years	10 hours	120 hours
11-15 years	13 hours & 20 minutes	160 hours
16+ years	16 hours & 40 minutes	200 hours

Note 1: A new hire whose employment terminates before the end of six months receives no AVL nor compensation for same.

Note 2: An employee whose employment terminates after six months of employment is compensated for earned-but-unused AVL.

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Note 3: An employee may carry over no more than 25% of his/her AVL from one calendar year to the next. Exceptions may be granted only by the Executive Director, Director of Human Resources, or the appropriate Administrative Team member; any excess carryover not authorized will be lost on January 1 if not used by then.

Note 4: Because vacations must be taken in advance to help insure efficient operation, there may be occasions upon which an employee takes AVL in excess of what (s)he has accrued but for which (s)he would have been eligible by the end of the calendar year. If the employee then terminates employment after taking such projected (but unearned) leave, his/her final paycheck will have deducted from it any such unearned leave. SUPERVISORS MAY APPROVE NO MORE THAN FORTY HOURS OF REQUESTED AVL IN EXCESS OF THAT WHICH A CATEGORY 1 EMPLOYEE HAS EARNED AT A GIVEN POINT (AND A LESSER, PRO-RATA MAXIMUM FOR CATEGORY 2 EMPLOYEES). APPROVAL OF PROJECTED LEAVE BEYOND THOSE LIMITS MUST BE AUTHORIZED BY THE EXECUTIVE DIRECTOR, THE DIRECTOR OF HUMAN RESOURCES, OR THE APPROPRIATE ADMINISTRATIVE TEAM MEMBER.

Note 5: New or re-hired employees with relevant experience may be credited with prior service in the Metropolitan Library System or other library (or governmental agency) to establish their AVL rate, with the approval of the Executive Director.

Note 6: Additional AVL hours, known as "Bonus Hours," are awarded at the end of each calendar year to be taken in the following year, as follows:

16 bonus AVL hours next year for using no more than 24 hours of Sick Leave\* this year; or

8 bonus AVL hours next year for using over 24 but 48 hours or less of Sick Leave\* this year.

(\*Excluding sick leave used for FMLA)

A new employee who worked less than a full year may be awarded bonus hours on a pro-rata basis; i.e., a fraction of the above bonus hours equal to the fraction of the year worked. Example: a new employee works the last six months of the calendar year, during which time (s)he used no more than 12 hours of Sick Leave. S(he) earns 8 bonus AVL hours for the new calendar year.

Note 7: Ordinarily, supervisors are advised not to approve requests for AVL periods over three weeks in length. Exceptions must be approved in

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advance by the Executive Director, Director of Human Resources or the appropriate Administrative Team member.

### Category Two (2) Employees:

SEE THE "AVL" SUMMARY FOR CATEGORY 1 EMPLOYEES.

The eligibility period and the Notes apply almost verbatim to Category 2 Employees.

The earn rate figures, however, should be translated to the pro-rata allotments, depending on the budget authorized work schedule. Example: after six months of successful employment, a half-time Category 2 employee is credited with (24) hours of AVL, not 48; a three/quarters-time Category 2 employee is credited with 36 hours, not 48, etc.

### Category Three (3) Employees:

Eligibility Period: 36 months (three years) of current, unbroken, continuous service, whether in a full-time or part-time capacity or combination of same.

After completing the eligibility period, the Category 3 employee begins to earn AVL credits from that point onward at a fixed annual rate; that is, the AVL Category 3 allotment does not change with additional years of service. The earn rate chart below illustrates this fixed rate.

#### AVL EARN RATE CHART FOR CATEGORY 3 EMPLOYEES

PART-TIME FRACTIONAL STATUS OF EMPLOYEE	HOURS/MINUTES OF AVL EARNED PER MONTH	HOURS OF AVL EARNED PER YEAR
Three/Fourths-Time	6 hours	72 hours
Half-Time	4 hours	48 hours

Note 1: Because the Category 3 employee does not begin to accumulate AVL until after completing three years of service, described above, there is no paid time off or compensation for AVL if the employee terminates before completing the eligibility period.

Note 2: Failure to work his or her usual schedule (i.e., no less than 60 hours for a three/quarter-time employee, no less than 40 hours for a half-time employee, in a pay period) during four pay periods in a calendar year will result in a reduction or outright loss of the AVL benefit.

Note 3: Supervisors are not authorized to project AVL benefits for Category 3 employees; i.e., the employee may only take the exact amount of AVL earned to date. Any excess taken will result in a dock in pay and may be

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grounds for termination.

- Note 4: Category 3 employees may carry over no more than 25 percent of their accumulated AVL from one calendar year to the next. Any amount in excess of the 25 percent will be lost as of January 1 in the new calendar year.
- Note 5: Category 3 employees are not eligible for Sick Leave; therefore, no AVL bonus hours are awarded to them.
- Note 6: See "GENERAL RULES GOVERNING THE USE OF LEAVE" for other guidelines and procedures on requesting and using this benefit.

## **Sick Leave**

### Category One (1) Employees:

Eligibility Period: upon employment

Earn rate: 10 hours per month for Category 1 employees

- Note 1: An employee can accrue (be credited with) no more than 960 hours of Sick Leave.
- Note 2: There is no compensation for unused Sick Leave.
- Note 3: Accrued Sick Leave in a previous term of service is not considered in a subsequent term of service. In this respect, a re-hired employee is considered a new employee.
- Note 4: Sick Leave may only be granted for the illness of an employee or in situations requiring the employee's care for a member of her/his immediate family or other Family and Medical Leave Act qualifying situations. See definition of "immediate family" at the beginning of this document. (Qualifying family under the Family and Medical Leave Act differs from the definition of "immediate family" and is the controlling definition in FMLA situations. See Family and Medical Leave in this policy.)
- Note 5: When an employee is unable to report for work because of illness or other allowable Sick Leave usage, the employee, or someone on his/her behalf, must call the immediate supervisor or person-in-charge at his/her work site or agency, if possible, at least thirty (30) minutes prior to the employee's scheduled start of work.
- Note 6: A Category 1 employee on Sick Leave more than 40 consecutive working



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hours must provide a doctor's statement upon returning to work.

Note 7: Illness during a period of other paid leave, such as AVL, counts as that type of leave and is not considered Sick Leave.

Note 8: If an employee's sick period lasts longer than accrued Sick Leave, the employee may use accrued, but not advanced, AVL or Floating Holiday time. If (s)he has no other accrued paid leave, time off past accrued Sick Leave will be deducted from pay (leave without pay).

Note 9: Leave available is the "current balance" at the beginning of the sick leave. Leave which is accrued during an absence (sick, AVL, etc.) is available only after the employee has returned to work.

### Category Two (2) Employees:

SEE THE "SICK LEAVE" SUMMARY FOR CATEGORY 1 EMPLOYEES.

The eligibility period and the Notes apply almost verbatim to Category 2 Employees.

The earn rate figures, however, should be translated to the pro-rata allotments. Example: a half-time Category 2 employee is credited with 5 hours of Sick Leave, not 10 per month; a three-fourths-time Category 2 employee is credited with 7.5 hours, not 10.

The number of hours of sick leave absence before requiring a doctor's statement for return to work should be translated to the pro-rate amounts depending on the normal hours per week of the employee. Example: a half-time Category 2 employee would be required to have a doctor's statement after an absence of 20 hours.

### Category Three (3) Employees:

CATEGORY 3 EMPLOYEES ARE NOT ELIGIBLE FOR SICK LEAVE; however, Category 3 employees are subject to the same call-in provisions as stated in Note 5 for Category 1 employees.

## **Doctor/Dental Leave**

### Category One (1) Employees:

#### Eligibility Period: upon employment

Note 1: A Category 1 employee is allowed up to three hours for his/her doctor's or dentist's appointment. This is not deducted from accrued leave time unless the doctor/dentist appointment spans more than three hours in which case all of the time off will be charged to Sick Leave, Annual

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Vacation Leave or Floating Holiday as available and chosen by the employee.

Note 2: When the doctor/dentist appointment occurs on a day when the employee also wishes or needs to take Sick Leave, Annual Vacation Leave or Floating Holiday time, doctor/dental leave may be taken only if the employee actually works a minimum of one hour between the time used for the doctor/dental leave and any other form of leave; otherwise the entire amount must be charged against the Sick Leave, Annual Vacation Leave or Floating Holiday accrual, as appropriate. (Example: doctor/dental leave from 8 a.m. to 10 a.m., works from 10 a.m. to 11 a.m., and take AVL from 11 a.m. to 5 p.m.; or doctor/dental from 8 a.m. to 10 a.m., work 10 a.m. to 3 p.m., and doctor/dental from 3 p.m. to 5 p.m. Each example includes one hour for lunch.)

Note 3: Doctor/Dental Leave applies only to appointments for the employee. Leave used to take an immediate family member to such an appointment is Sick Leave, Annual Vacation Leave, Floating Holiday or leave without pay.

### Category Two (2) Employees:

SEE THE "DOCTOR/DENTAL LEAVE" SUMMARY FOR CATEGORY 1 EMPLOYEES

The eligibility period and the Notes apply verbatim to Category 2 employees.

The time allotment for Doctor/Dental Leave is not prorated for Category 2 employees.

### Category Three (3) Employees:

CATEGORY 3 EMPLOYEES ARE NOT ELIGIBLE FOR DOCTOR/DENTAL LEAVE.

## **Floating Holiday Leave**

A floating holiday:

is paid time off scheduled at the employee's convenience, subject to supervisor's approval, when the libraries are open;

Supplements the system's annual Holiday Calendar, which lists legal holidays when libraries are closed;

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Is not considered Annual Vacation Leave; however it must be requested in the same manner as AVL and approved by the supervisor.

### Eligibility:

Category 1 employees are eligible within the limitations cited below.

Category 2 employees are eligible within the limitation cited below, but on a pro rata basis.

Category 3 employees are eligible within the limitation cited below, but on a pro rata basis after 36 months (three years) of current, unbroken, continuous service, whether in a full-time or part-time capacity or combination of same.

### Number Allowed:

16 hours per calendar year maximum. (See Limitations below.)\*

### Minimum Time Off Per Occurrence:

Employees may not schedule less than 15 minutes of Floating Holiday time per occurrence.

### When Taken:

May be taken in conjunction with Annual Vacation Leave or legal holidays or independently.

### Limitations:

- \* New employees hired on or after July 1 are eligible for one floating holiday for that calendar year, except new employees hired on or after December 1 are not eligible for this benefit in that calendar year.
- \* New employees are not eligible for this benefit until they have completed at least 30 calendar days of service.
- \* No carryover privilege from one calendar year to the next.
- \* Employees will not be compensated for unused Floating Holiday time.

## **Administrative Leave with Pay – All Employees**

The Executive Director, or the designated Deputy Executive Director in the director's absence, may place an employee on an Administrative Leave with pay when the need

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for such is a result of (1) a need to conduct an investigation of possible wrong doing on the part of the employee, or (2) a need in the Due Process Procedure for the absence of the employee pending a Due Process hearing under the policy establish for the same within the adopted Policies of the Metropolitan Library Commission. In no case, shall such Administrative Leave with pay exceed thirty (30) working days.

## **Family and Medical Leave**

### Category One (1) Employees:

Eligibility Period: one year of employment and at least 1250 hours worked or on approved paid leave during the previous 12 months before the request for leave.

Definitions specifically applicable to this leave:

Benefits: all programs such as group life insurance, health insurance, disability insurance, sick leave, annual leave, retirement pension, educational benefit regardless of whether the benefits are provided by a practice or written policy of the library system or through an employee benefit plan.

Health care provider: doctor of medicine or osteopathy and anyone else designated by the U.S. Secretary of Labor to be capable of providing health care services.

Parent: biological parent or person charged with the duties and responsibilities of a parent excluding parent-in-law.

Son or daughter: a biological, adopted or foster child, a stepchild, a legal ward or a child of a person standing in loco parentis, any one of whom who is younger than 18 years old, or is 18 years old or older and incapable of self-care because of a mental or physical disability.

Spouse: husband or wife as recognized by Oklahoma law for marriage.

Serious health condition: an illness, injury, impairment or physical or mental condition that involves 1) inpatient care in a hospital, hospice or residential medical facility or 2) continuing treatment by a health care provider.

All definitions are established by federal law and regulations and, in case of disagreement with those of this policy, are governing.

Note 1: An eligible employee--male or female--may take up to 12 weeks of leave during any 12 month period\* for the birth of a child, the placement of a child with the employee for adoption or foster care, to care for a spouse, son, daughter or parent with a serious health condition, or because of the employee's own serious health condition.

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\*Any 12 month period is interpreted as 12 months following the end of the last twelve weeks of Family and Medical Leave, whether continuous or intermittent.

Note 2: Leave for adoption, foster care, or birth of a child generally may not be taken intermittently or on a reduced schedule unless the supervisor and the employee agree to such an arrangement. An intermittent or reduced leave schedule may be taken for leave related to serious health conditions, if such an arrangement is medically necessary.

If an employee requests this intermittent or reduced leave, based on planned medical treatment, the library system may require that the employee transfer temporarily to another job with equivalent pay and benefits that better accommodates the employee's need for recurring periods of leave.

Note 3: As a part of the 12-week leave, any accumulated annual vacation leave in excess of 10 days and any accumulated sick leave in excess of 10 days must be used by the employee. The employee may use all or a portion of the remaining accumulated annual vacation leave or sick leave or may use floating holidays as a part of the 12-week leave.

Note 4: The employee must provide the library system with at least 30 days' notice when the leave is foreseeable, such as for the expected birth or adoption of a child. Where not possible, the employee must provide as much notice as is practical.

When leave is required for a serious health condition with planned medical treatment, the employee must make a reasonable effort to schedule treatment so that the disruption to the library system's operation is minimized.

Note 5: When both husband and wife work for the library system, the full amount of leave is limited to an aggregate of 12 weeks when the leave is for the birth, adoption or foster care of a child or to care for a sick parent. However, if the reason is the illness of a child or either spouse, each spouse is entitled to 12 weeks of leave.

Note 6: The request for leave must be supported by a health care provider's certification of the medical condition of the person affected. Employees must provide this certification within 15 calendar days, unless it is not practicable to do so under the circumstances. The certification should be in a format acceptable to the Human Resources Office and contain sufficient information to meet the requirements or on the U.S. Department of Labor form WH-380.

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Additionally, the certification should include a statement that the employee is needed to care for the child, spouse or parent and an estimate of the amount of time that the employee is needed. If the employee is ill, the certification should include a statement that the employee is unable to perform his or her job. When the certification is for intermittent leave for planned medical treatment, it should include the dates on which the treatment is expected to be given and the duration of the treatment.

If the Director of Human Resources has reason to doubt the validity of the original certification, the library system may require a second opinion--paid for by the library system--from a health care provider who is designated or approved by the library system.

The employee may obtain a third opinion--at the library system's expense--when the second opinion differs from the first. The health care provider for the third opinion must be someone designated or approved by the library system. This third opinion is considered final and binding on both the library system and the employee.

- Note 7: The employee, on return from leave, is entitled to his or her former position, or an equivalent position, with equivalent employment benefits, pay and other terms and conditions of employment.
- Note 8: An employee on family and medical leave will not lose any benefits that accrued before the leave began; however, an employee will not be eligible to use any leave accrued during the absence until the employee has returned to work.
- Note 9: Group health/dental insurance plan coverage will be continued during the leave at the same level and conditions of coverage that would have been provided had the employee not taken leave. The Library System will continue to contribute the library's share of premiums during the leave. The library system may recover its share of premiums for the employee during unpaid leave when the employee doesn't return from leave for reasons other than a continuation, recurrence or onset of a serious health condition.

### Category Two (2) Employees:

SEE THE SUMMARY FOR CATEGORY 1 EMPLOYEES.

The provisions apply almost verbatim to Category 2 Employees.

The eligibility requirements listed for Category 1 Employees also apply to Category 2 Employees and supersede other provisions for establishing categories. Benefits not

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otherwise provided to Category 2 Employees are not granted by provisions of this leave program.

### Category Three (3) Employees:

SEE THE SUMMARY FOR CATEGORY 1 EMPLOYEES.

The provisions apply almost verbatim to Category 3 Employees.

The eligibility requirements listed for Category 1 Employees also apply to Category 3 Employees and supersede other provisions for establishing categories. Benefits not otherwise provided to Category 3 Employees are not granted by provisions of this leave program.

## **Bereavement Leave**

### Category One (1) Employees:

Eligibility Period: upon employment

Note 1: A Category 1 employee may take up to five days (40 hours) of Bereavement Leave at the time of a death in the immediate family. This time is not deducted from Sick Leave, Annual Vacation Leave or Floating Holiday time, and does not affect bonus AVL.

Note 2: See definition of "immediate family" at the beginning of this document.

Note 3: Additional time desired for bereavement must be taken from other accrued leave the employee may have or Leave Without Pay.

### Category Two (2) Employees:

SEE THE "BEREAVEMENT LEAVE" SUMMARY FOR CATEGORY 1 EMPLOYEES.

The eligibility period and the Notes apply almost verbatim to Category 2 employees. The 40-hour maximum leave limit, however, is translated to the pro-rata allotments. Examples: a half-time Category 2 employee is eligible for up to 20 hours of Bereavement Leave; a three/fourths-time employee is eligible for up to 30 hours.

### Category Three (3) Employees:

Eligibility Period: 36 months (three years) of current, unbroken, continuous service, whether in a full-time or part-time capacity or combination of same.

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SEE THE "BEREAVEMENT LEAVE" SUMMARY FOR CATEGORY 1 EMPLOYEES.

The Notes apply almost verbatim for the Category 3 employee.

The 40-hour maximum leave limit, however, is translated to the pro-rata allotments, either 50 percent or 75 percent, depending on whether the work schedule is half-time or three/fourths-time: a half-time Category 3 employee is eligible for up to 20 hours of Bereavement Leave; a three/fourths-time employee is eligible for up to 30 hours.

## **Sabbatical Leave**

### Category One (1) Employees

Eligibility Period: one year of employment

A Category 1 employee, after meeting the eligibility requirement, may request a leave of absence without pay for up to 12 months to attend a library school for the purpose of acquiring a master's degree in library science.

Note 1: This leave must be applied for at least three months in advance, in writing, and approved by the Executive Director.

Note 2: The employee on Sabbatical Leave does not lose accrued Sick Leave and AVL; nor does (s)he lose any accredited service insofar as the retirement pension plan is concerned; however, no Sick Leave or AVL is accrued by the employee during the Sabbatical Leave.

Note 3: Upon returning to work, the employee is guaranteed a position paying no less than the salary received prior to the Sabbatical Leave.

Note 4: To assure proper planning and staffing, the employee on Sabbatical Leave is asked to inform the Director of Human Resources of her/his intentions, either to return to work or to resign, no later than two weeks (14 calendar days) prior to the end of the Sabbatical Leave.

### Category Two (2) Employees:

SEE THE "SABBATICAL LEAVE" SUMMARY FOR CATEGORY 1 EMPLOYEES.

The eligibility period and Notes apply almost verbatim to Category 2 employees; however, the provisions for continued participation in the retirement pension plan are not applicable to Category 2 employees because they are not covered by the



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retirement plan.

### Category Three (3) Employees:

Eligibility Period: 36 months (three years) of current, unbroken, continuous service, whether in a full-time or part-time capacity or combination of same.

SEE THE "SABBATICAL LEAVE" SUMMARY FOR CATEGORY 1 EMPLOYEES.

The provisions for continued participation in the retirement pension plan are not applicable to Category 3 employees because they are not covered by the retirement plan.

## **Military Leave**

Eligibility Period: upon employment

### Category One (1) Employees

- Note 1: Military Leave shall be granted in accordance with Oklahoma State Law and such rights and privileges as it provides.
- Note 2: Such leave shall be granted to Category 1 employees in Reserve or National Guard units only if such leave is required to maintain the employee's status in the Reserve or Guard unit.
- Note 3: Reserve or National Guard members, when ordered to active duty, are entitled to leave with pay for the first thirty (30) calendar days per each federal fiscal year of the tour of active duty.
- Note 4: The employee must notify his or her supervisor verbally or in writing as far in advance as possible of the call-up or orders. It is preferred, not required, that a copy of the Reservist's or National Guard member's orders be forwarded to the Human Resources Office in advance.

### Category Two (2) Employees:

SEE THE "MILITARY LEAVE" SUMMARY FOR CATEGORY 1 EMPLOYEES.

The eligibility period and the Notes apply almost verbatim to Category 2 employees.

Category 2 employees receiving benefits based on half-time employment will receive credit for four (4) hours of work for each day of Military Leave not to exceed 20 hours per week or 40 hours per pay period.

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Category 2 employees receiving benefits based on three-fourths-time employment will receive credit for six (6) hours of work for each day of Military Leave not to exceed 30 hours per week or 60 hours per pay period.

Category 2 employees receiving benefits based on any other fractional amount of employment will receive credit on a pro-rata basis.

### Category Three (3) Employees:

Eligibility Period: 36 months (three years) of current, unbroken, continuous service, whether in a full-time or part-time capacity or combination of same.

SEE THE "MILITARY LEAVE" SUMMARY FOR CATEGORY 1 EMPLOYEES.

The Notes apply almost verbatim to Category 3 employees.

Category 3 employees receiving benefits based on a fixed schedule of a minimum of 40 hours per pay period will receive credit for four (4) hours of work for each day of Military Leave not to exceed 20 hours per week or 40 hours per pay period.

Category 3 employees receiving benefits based on a fixed schedule of a minimum of 60 hours per pay period will receive credit for six (6) hours of work for each day of Military Leave not to exceed 30 hours per week or 60 hours per pay period.

Any part-time employee not meeting the Category 3 definition or the eligibility period requirement will be granted Military Leave for Reserve or National Guard service in accordance with Oklahoma State Law and such rights and privileges as it provides.

## **Public Business Leave**

Eligibility Period: upon employment

Category 1, 2 and 3 employees who receive and present to their supervisor an official, written summons (subpoena, court order, letter of request, etc.) to assist in conducting public business will be authorized paid leave; Category 1 employees at full benefit,

Category 2 and 3 employees at pro-rated benefit. Those employees not eligible for paid leave will be granted leave without pay. "Public Business" is defined as any trial, hearing or public meeting at which "The People's Business" is conducted; i.e., any event in which the participant helps to serve the public interest and to which (s)he is summoned to appear as one of the following:

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- A. Grand Juror
- B. Trial Juror
- C. Witness and/or victim
- D. Expert or specialist in a field or area involved in a court's or legislative body's effort to determine truth, administer justice, write legislation, etc.

**Note:** Any fees received for performing this public business need not be given to the Library System unless paid as a direct result of the employee's having represented the Library System on library time.

### Personal Business - Public Proceedings

"Personal Business" is defined as an event or proceeding in which the employee has a private interest engendered either on his/her own or by reason of his/her having been involved or is charged with having been involved in a criminal act as suspect, defendant, et al; that is, as a "named party" in a criminal case; also, a "named party" in a civil case (suit for damages, the filing and/or reading or contesting of a will, legal separation, divorce, adoption, guardianship or other domestic, legal matter, etc.).

**Note:** Any employees absent from work because of Personal Business will be charged Annual Leave or Floating Holiday time; any absence from work for which sufficient accumulated leave is not available will be deducted from pay.

### Professional Short Term Leave

#### Category One (1) Employees:

Eligibility Period: upon employment

Category 1 employees, with their supervisor's approval, may be granted authorized leave with pay to attend professional meetings or conferences at their own or at the library system's expense.

Note 1: Procedures for requesting approval of, and reimbursement for, travel and other expenses are detailed in SF 600 – TRAVEL AND REGISTRATIOLON EXPENSE REIMBURSEMENT, of the Policy and Procedure Manual.

Note 2: Compensation of non-exempt employees while attending or traveling to professional meetings or conferences for the library's benefit shall be governed by the Fair Labor Standards Act.

A Category 1 employee, with her/his supervisor's approval, may be granted a leave

# **SH 200 Benefits**

## **SH 220 Employee Leave Policies**

*Revised: 12/02, 7/07*

of absence to attend classes, short courses or summer sessions of an undergraduate or graduate school. The employee taking such leave may be required to make up the time, depending on library needs.

### Category Two (2) Employees

SEE THE "PROFESSIONAL, SHORT-TERM LEAVE" SUMMARY FOR CATEGORY 1 EMPLOYEES.

The eligibility period and Notes apply almost verbatim to Category 2 employees. When attendance is of benefit to the library system, professional short-term leave to attend professional meetings, seminars or workshops, compensation is governed by the Fair Labor Standards Act.

### Category Three (3) Employees

Category 3 employees and other part-time employees not meeting the Category 3 definition or the eligibility period requirement will be compensated in accordance with the Fair Labor Standards Act for attendance at professional meetings, seminars or workshops when such attendance is of benefit to the Library System.

## **Leave to Vote – All Employees**

Eligibility Period: upon employment

Oklahoma law specifies that employees who are registered voters and whose work schedule hampers their ability to vote in a public election may have time off with pay to vote.

Eligibility criteria:

1. Must be a registered voter.
2. Must be scheduled to work on Election Day within three hours after the polls open and three hours before the polls close. \*\*

\*\*Example: Polls open from 7 a.m. to 7 p.m. Employee is scheduled to work from 8 a.m. to 5 p.m. Employee may request up to two hours of paid leave to vote.

Registered voters not eligible for such paid leave are those employees, normally part-time, hourly workers, whose work schedule can be arranged to allow them sufficient free time (three hours) before or after work to vote.

Anyone who is otherwise eligible and who is the only employee normally on duty in a particular work unit during the above time frame may request leave to vote; upon such a

# **SH 200 Benefits**

## **SH 220 Employee Leave Policies**

*Revised: 12/02, 7/07*

request, the supervisor should arrange for a substitute if it is necessary for the work unit to be open during the regular employee's absence.

### Procedures:

1. A registered voter eligible for, and needing, paid time off to vote must ask the supervisor for such leave no later than one working day before the election.
2. The supervisor has the authority to set the time period for the employee to take the leave so as to assure the most efficient staffing for the work unit. In a case where two or more eligible employees request the same time period, the supervisor may "stagger" the time off on the basis of who asked for the leave first.
3. Leave to vote must be reported on the employee's time sheet.

If an employee is off work on leave of any kind, leave to vote will not be authorized--the assumption being that the employee is either too sick to visit the polls or has sufficient Annual Vacation Leave or Floating Holiday time available.

# Your Rights under the Family and Medical Leave Act of 1993

FMLA requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to "eligible" employees for certain family and medical reasons. Employees are eligible if they have worked for their employer for at least one year, and for 1,250 hours over

the previous 12 months, and if there are at least 50 employees within 75 miles. The FMLA permits employees to take leave on an intermittent basis or to work a reduced schedule under certain circumstances.

## Reasons for Taking Leave:

Unpaid leave must be granted for *any* of the following reasons:

- to care for the employee's child after birth, or placement for adoption or foster care;
- to care for the employee's spouse, son or daughter, or parent who has a serious health condition; or
- for a serious health condition that makes the employee unable to perform the employee's job.

At the employee's or employer's option, certain kinds of *paid* leave may be substituted for unpaid leave.

## Advance Notice and Medical Certification:

The employee may be required to provide advance leave notice and medical certification. Taking of leave may be denied if requirements are not met.

- The employee ordinarily must provide 30 days advance notice when the leave is "foreseeable."
- An employer may require medical certification to support a request for leave because of a serious health condition, and may require second or third opinions (at the employer's expense) and a fitness for duty report to return to work.

## Job Benefits and Protection:

- For the duration of FMLA leave, the employer must maintain the employee's health coverage under any "group health plan."

- Upon return from FMLA leave, most employees must be restored to their original or equivalent positions with equivalent pay, benefits, and other employment terms.
- The use of FMLA leave cannot result in the loss of any employment benefit that accrued prior to the start of an employee's leave.

## Unlawful Acts by Employers:

FMLA makes it unlawful for any employer to:

- interfere with, restrain, or deny the exercise of any right provided under FMLA;
- discharge or discriminate against any person for opposing any practice made unlawful by FMLA or for involvement in any proceeding under or relating to FMLA.

## Enforcement:

- The U.S. Department of Labor is authorized to investigate and resolve complaints of violations.
- An eligible employee may bring a civil action against an employer for violations.

FMLA does not affect any Federal or State law prohibiting discrimination, or supersede any State or local law or collective bargaining agreement which provides greater family or medical leave rights.

## For Additional Information:

If you have access to the Internet visit our FMLA website: <http://www.dol.gov/esa/whd/fmla>. To locate your nearest Wage-Hour Office, telephone our Wage-Hour toll-free information and help line at 1-866-4USWAGE (1-866-487-9243): a customer service representative is available to assist you with referral information from 8am to 5pm **in your time zone**; or log onto our Home Page at <http://www.wagehour.dol.gov>.



U.S. Department of Labor  
Employment Standards Administration  
Wage and Hour Division  
Washington, D.C. 20210

Stewardship of Human Resources

WH Publication 1420  
Revised August 2001

SH - 71

DESCRIPTION OF SERIOUS HEALTH CONDITION  
(Family and Medical Leave Act of 1993)

A "**Serious Health Condition**" means an illness, injury, impairment, or physical or mental condition that involves one of the following:

1. Hospital Care

Inpatient care (i.e., an overnight stay) in a hospital, hospice, or residential medical care facility, including any period of incapacity\* or subsequent treatment in connection with or consequent to such inpatient care.

2. Absence Plus Treatment

A period of incapacity\* of more than three consecutive calendar days (including any subsequent treatment or period of incapacity relating to the same condition), that also involves:

- (a) Treatment\*\* two or more times by a health care provider, by a nurse or physician's assistant under direct supervision of a health care provider, or by a provider of health care services (e.g., physical therapist) under the orders of, or on referral by, a health care provider; **or**
- (b) Treatment by a health care provider on at least one occasion which results in a **regimen of continuing treatment\*\*\*** under the supervision of the health care provider.

3. Pregnancy

Any period of incapacity due to pregnancy, or for prenatal care.

4. Chronic Conditions Requiring Treatments

A chronic condition which:

- (a) Requires periodic visits for treatment by a health care provider, or by a nurse or physician's assistant under the direct supervision of a health care provider;
- (b) Continues over an extended period of time (including recurring episodes of a single underlying condition);

And

- (c) May cause episodic rather than a continuing period of incapacity (e.g., asthma, diabetes, epilepsy, etc.).

5. Permanent/Long-term Conditions Requiring Supervision

A period of incapacity which is permanent or long-term due to a condition for which treatment may not be effective. The employee or family member must be under the continuing supervision of, but need not be receiving active treatment by, a health care provider. Examples include Alzheimer's, a severe stroke, or the terminal stages of a disease.

6. Multiple Treatments (non-Chronic Conditions)

Any period of absence to receive multiple treatments (including any period of recovery, therefrom) by a health care provider or by a provider of health care services under orders of, or on referral by, a health care provider, either for restorative surgery after an accident or other injury, or for a condition that would likely result in a period of incapacity of more than three consecutive calendar days in the absence of medical intervention or treatment, such as cancer (chemotherapy, radiation, etc.), severe arthritis (physical therapy), kidney disease (dialysis).

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\* "Incapacity," for purposes of the Act, is defined to mean inability to work, attend school, or perform other regular daily activities due to the serious health condition, treatment therefor, or recovery therefrom.

\*\* Treatment includes examinations to determine if a serious health condition exists and evaluations of the condition. Treatment does not include routine physical examinations, eye examination or dental examinations.

\*\*\*A regimen of continuing treatment includes, for example, a course of prescription medication (e.g., an antibiotic) or therapy requiring a special equipment to resolve or alleviate the health condition. A regimen of treatment does not include taking of over-the-counter medications such as aspirin, antihistamines, or salves; or bed-rest, drinking fluids, exercise, and other similar activities that can be initiated without a visit to a health care provider.

**Family and Medical Leave Act Certification of Health Care Provider**  
For Use by Metropolitan Library System employees

Instructions to employee:

1. Print a copy of your job description from the Intranet and provide it along with the two pages of this certification to your health care provider.

The job description is necessary for the health care provider to determine if there is the need for restrictions and to assist them in predicting the duration of the need to be off or the duration of any restrictions.

***or***

2. If the individual with the serious health condition is an immediate family member (as defined on the form) provide the form (without the job description) to the individual's health care provider.

When completed, send to Human Resources (HUM) in a sealed white envelope. If routed through inter-agency mail, send the white envelope inside a routing envelope.



## FAMILY AND MEDICAL LEAVE ACT CERTIFICATION OF HEALTH CARE PROVIDER

For Use By Metropolitan Library System Employees

**Employee's Name:** \_\_\_\_\_ **Location:** \_\_\_\_\_

To qualify for Family and Medical Leave Act provisions, the employee or an immediate family member of the employee (as defined below) must have a condition that meets the definition of a "serious health condition" as described on the attached/enclosed.

An immediate family member under the Family and Medical Leave Act includes the employee's spouse, son, daughter or parent.

### **AUTHORIZATION FOR THE RELEASE OF INFORMATION**

HIPAA Privacy Rules limit the release of detailed medical information for Family and Medical Leave Act certification. I hereby authorize this one time release of the requested information for the purpose of determining eligibility for Family and Medical Leave provisions for the employee of the Metropolitan Library System.

\_\_\_\_\_  
**Signature of Employee/Personal Rep./Family Member as applicable**

\_\_\_\_\_  
**Date**

### **MEDICAL SERVICES PROVIDER STATEMENT**

Please check below as to whether this applies to the employee or an immediate family member.

I hereby certify that the ☐ employee or ☐ an immediate family member as defined above meets one or more of the "serious health condition" qualifications.

### **ANTICIPATED DURATION OF LEAVE**

Leave Effective Date: \_\_\_\_\_ Leave End Date: \_\_\_\_\_

*or*

☐ a chronic condition that requires periodic visits for treatment, continues over an extended period of time or may cause episodic rather than a continuing period of incapacity. **(Please indicate leave effective date.)**

*and*

If it is medically necessary for the employee to be off work on an intermittent basis or to work less than the employee's normal schedule of hours per day or days per week please explain.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
**Signature of Health Care Provider**

\_\_\_\_\_  
**Date**

This certification is designed to request both non-specific and the least possible amount of personal health information necessary to qualify for the Family and Medical Leave Act.

# **Your Employee Assistance Program (EAP)**

## **What is the Employee Assistance Program (EAP)?**

EAP helps employees find solutions to such issues as:

- Parenting/family concerns
- Emotional stress
- Alcohol and drug problems
- Job related issues
- Other problems

## **Why call EAP?**

Because . . . asking for help is the **SMART THING** to do!

Early self-intervention with personal problems can positively impact performance at work and at home.

Getting help early prevents other medical and psychological problems from progressing.

## **Who provides EAP services?**

INTEGRIS Corporate Assistance Program (CAP) provides EAP services for Metropolitan Library System employees and their family members that reside in the home. CAP representatives are experienced professionals with extensive experience in psychology and counseling. They have special training in handling personal, family and career matters. Each CAP representative is selected not only for their expertise but also for their special qualities of understanding, sensitivity and compassion.

## **Are there any costs to me for EAP services?**

**No.** EAP services are pre-paid for each employee. Should you and your CAP representative decide additional counseling or resources are necessary to solve your concerns, the representative will refer you to the closest service provider able to meet the requirements of your presented problem and financial abilities.

## **Is counseling really confidential?**

This program is confidential. If you choose to use the counseling service, no one will know unless you tell them. Information is released only with your permission, or in those situations in which problems are life-threatening or disclosure is required by law.

If your supervisor initiates a referral on your behalf, no one need know except you and your supervisor.

## **How do I contact CAP?**

Services are available by telephone and in person. For assistance, call one of the numbers listed below, ask for a CAP representative and identify your place of employment.

**INTEGRIS Corporate Assistance Program**  
**405.947.2688\* Oklahoma City**  
**800.677.2729\* Toll Free**  
**E-mail: [cap@integris-health.com](mailto:cap@integris-health.com)**

\* CAP provides a **24-hour HELPLINE** for **crisis intervention services**. A counselor is on call 24 hours per day, seven days a week, 365 days per year. During evenings, weekends, and holidays, the line is answered by a 24-hour answering service. The answering service will page the counselor on call.

Visit the CAP website at [www.integriseap.com](http://www.integriseap.com) to access a wide variety of information regarding workplace issues.

**EAP SERVICES CAN MAKE A DIFFERENCE IN THE WAY YOU FEEL ABOUT YOUR JOB AND YOUR LIFE!**

## Learning and Performance Development

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The Metropolitan Library System encourages its employees to grow and develop by offering a wide range of professional development opportunities through which employees can enhance their workplace skills and knowledge. Educational development is supported across the system – regardless of the employees' employment role. Participation in work-related courses and educational programs during work hours is at the discretion of the requesting employee's supervisor.

Metro University is the employee training and development component of the MLS Planning Services Department. Employees may register for a variety of offerings held throughout the calendar year focusing on such topics as leadership and management, business processes, workplace skills, computer applications, and organizational development. Training sessions are held at both system and nonsystem locations. Course offerings, descriptions, and enrollment procedures are available via the MLS Intranet at: [http://morris/GotInfo/training/metro\\_university.htm](http://morris/GotInfo/training/metro_university.htm)

# **SH 200 Benefits**

## **SH 230 Continuing Education Units Plan**

*Adopted: 6/93*

### **Policy**

The Metropolitan Library System will provide Continuing Education Units for education and training taken by its staff whenever appropriate, based on the criteria and guidelines of the International Association for Continuing Education and Training (IACET). A permanent record of such training awards will be maintained for all individual personnel.

### **Implementation**

The Planning Services Office of the library system will continue to develop and maintain the Continuing Education Unit program.

1. The Planning Services Office staff will include a statement of the number of CEUs available for each of the education/training events conducted by the Metropolitan Library System in the system's catalog of education and training.
2. The Planning Services office will enhance current training records to include a statement of courses attended and CEUs earned for all staff, and will maintain those records.
3. Education and training events offered for official staff education and training by the library system by utilizing qualified trainers from other organizations will be reviewed by Planning Services for possible CEU credits. When such events qualify, CEU credit will be granted staff who successfully complete such courses.
4. Library system staff who participate in activities outside the library system and would like to receive CEU credit for them should provide full information concerning the event and their participation to the Planning Services Office. Planning staff will review the event in question with the criteria and guidelines of the IACET provided below and determine the eligibility in each situation.

### **Background**

This plan is structured to adhere to criteria and guidelines established by the International Association for Continuing Education and Training (IACET) in its publication "THE CONTINUING EDUCATION UNIT CRITERIA AND GUIDELINES," Fourth Edition, 1991. In most instances, the exact wording of the IACET document has been used here.

# **SH 200 Benefits**

## **SH 230 Continuing Education Units Plan**

*Adopted: 6/93*

### Program Compliance with IACET criteria and guidelines:

1. The Continuing Education Unit (CEU) is based on 10 hours of contact education/training participation.
2. Calculations of contact hours involved in a continuing education experience may include the following elements:
  - A. Classroom or meeting session time with direct participation between the learner and instructor or discussion leader is converted directly to contact hours.
  - B. Activities that use methods such as supervised independent study, directed reading or project-based assignments may be awarded CEU. In such cases, the contact hours to be awarded may be determined after field testing has shown the average amount of time (in hours) required to complete the learning activity.
  - C. Field trips (minus travel and other administrative time) and other experiential course activities may be awarded CEU, but usually on a basis of at least two experiential hours being required for each contact hour of instruction (CEU).
3. Examples of types of learning activities that DO NOT QUALIFY for CEUs:
  - A. Association Membership and Certification Programs. Noneducational activities of professional, occupational, or other organizations that otherwise may be used to qualify for professional and occupational group membership or certification.
  - B. Committee Meetings. Committee activities and assignments.
  - C. Credit Programs. The individual may not be awarded both CEU and academic credit for secondary or post-secondary courses and programs.
  - D. Entertainment and Recreation. Attendance at cultural performances, entertainment or recreational meetings or activities, and participation in travel groups.
  - E. High-School Equivalency. Programs leading to high school equivalency certificates or diplomas.
  - F. Individual Scholarship. Independent writings such as articles or research reports, or presentation of papers outside a planned, directly supervised continuing education experience that fulfills CEU criteria.
  - G. Mass Media Programs. Programs delivered through the media (e.g., television, radio, newspaper) do not qualify for the CEU, UNLESS these presentations are an

# **SH 200 Benefits**

## **SH 230 Continuing Education Units Plan**

*Adopted: 6/93*

integral part of a planned continuing education experience that qualifies for under CEU criteria.

- H. Meetings, Conferences and Conventions. Meetings, conferences and conventions of professional, occupational, or other organizations do not qualify, per se, as continuing education experiences. However, specially organized courses, workshops, or seminars held in conjunction with such meetings qualify for CEU when both administrative and program CEU criteria are met.
- I. Program Instruction. An instructor or leader of a continuing education activity for which CEU are awarded is not eligible to receive CEU for that program or activity.
- J. Unsupervised Study. Individual, self-directed study or other forms of independent learning experience not planned, directed and supervised by a (CEU) sponsor or provider.
- K. Work Experience. On-the-job training and other work experiences do not qualify for CEU unless the experience is structured as a part of a planned and supervised continuing education experience that fulfills both administrative and program CEU criteria. CEU are not to be awarded based on an evaluation of prior life or work experiences.

#### **4. Administrative Criteria**

- A. Organization. The sponsoring organization has an identifiable continuing education arm or unit with designated professional staff having the authority to administer and coordinate an organized schedule of continuing education programs.

Guidelines. The educational arm or unit may consist of one or more persons. The identity of the unit will be evidenced by a written mission statement that outlines the functions, structure, processes and philosophy which guide the operations of the continuing education or training program.

- B. Responsibility and Control. The sponsor or provider, through its continuing education department or office, ensures that both the administrative and program criteria are followed for learning experiences offering CEU.

Guidelines. Internal policies should clearly delineate that the continuing education department or office has the authority and responsibility for establishing and implementing review procedures to ensure that continuing education activities offering CEU meet all criteria.

# **SH 200 Benefits**

## **SH 230 Continuing Education Units Plan**

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- C. System for Awarding CEU. The sponsor provides a system for identifying participants who meet the requirements for satisfactory completion and maintains permanent CEU records for individuals.

Guidelines. A designated official of the continuing education organization, usually the coordinator or instructor, verifies and reports that each participant has (or has not) met the specified requirements for satisfactory completion and is (or is not) awarded CEU. Permanent individual records are then established including the number of CEU awarded each participant. Only those learners who successfully complete a program or activity are awarded CEU, and only those learning experiences for which CEU were awarded appear on the participant's permanent CEU record. Information on individual failures to qualify for CEU is maintained only in the sponsor's program file rather than on individual CEU records.

Because participants in a continuing education experiences may not recognize, at the time, the potential value of a permanent record of their participation and achievement, the decision to record CEU awarded is not left to the individual participant. Therefore, the sponsor or provider is expected to maintain a permanent record for each participant who successfully completes a program or activity and to record the number of CEU awarded.

- D. Maintenance and Availability of Records. A permanent record of participation is maintained for each individual to whom CEU are awarded and is readily available to the individual upon request. While the record may be maintained by the organization or a contracted service, the organization awarding the CEU bears the primary responsibility for the maintenance and availability of permanent records.

Guidelines. The sponsor or provider responsible for establishing and maintaining permanent records of all CEU awarded to individual participants must have a written policy on retention and release of such records. Cumulative records of all CEU earned by each participant are to be available for a minimum of 7 (herewith defined as "permanent") years and are to be issued as an official statement of transcript upon request by the participant. Further, the sponsor or provider must establish, in writing, provisions for permanent maintenance of its CEU records in the event of its demise.

The following specified items of information are to be included on all CEU records and transcripts:

- Name and address of the provider
- Name and Social Security number (or other ID) of the participants
- Title of the program (as descriptive as possible)

# **SH 200 Benefits**

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- Completion date of the program or activity
- Number of CEUs awarded

Report of assessment results or other criteria for satisfactory completion.

Additional information, such as current address and telephone number, may be included at the option of the provider.

- E. Facilities. The sponsor provides or arranges for appropriate educational facilities, library or reference materials, instructional aids and equipment consistent with the purpose, design and intended learning outcomes of each learning experience.

Guidelines. The design and use of facilities should enhance the opportunities of learners and teaching staff to communicate effectively. For example, lighting, sound, seating and visuals should be appropriate, and sufficient reference materials and other needed resources should be available to enhance learning.

### **Program Criteria**

1. Needs Identification. The program or activity is planned in response to the identified needs of a target audience.

Guidelines. The purpose of identifying learning needs is to ensure that the planned activity is relevant to the learner's continuing education and/or job requirements. Needs may be identified in several ways:

- For example, input from learners, their supervisors, their organizations and/or professions. The key to effective needs assessment is the identification of the gap between what the learner knows and what the learner needs to know. The documentation produced by needs assessment becomes the basis for developing learning outcomes.
2. Learning Outcomes. The continuing education provider has clear and concise written statements of intended learning outcomes (e.g., behavioral or performance objectives) for each continuing education program/ activity.

Guidelines. Intended learning outcomes are synonymous with behavioral and performance objectives. Their purpose is to specify the determined skills, knowledge and/or attitudes that the learner should be able to demonstrate following the continuing education experience. The learners should be aware of these intended learning outcomes prior to and during the activity. Such outcomes form the basis for measurement of progress, periodic feedback and final assessment.



# **SH 200 Benefits**

## **SH 230 Continuing Education Units Plan**

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3. **Instruction.** Qualified instructional personnel are directly involved in determining the program purpose, developing intended learning outcomes, and planning and conducting each learning experience.

**Guidelines.** A systematic and sequential process that fulfills the specified purposes and intended learning outcomes of the continuing education experience requires program leaders or instructional staff who have the following qualifications:

- Competence in the subject matter
  - Understanding of the purposes and intended learning outcomes of the continuing education or training experience
  - Knowledge and skill in the instructional methodologies and learning processes to be used
  - Ability to communicate the educational content to the participants at an appropriate level.
4. **Content and Methodology:** The content and instructional methodologies selected are consistent with stated learning outcomes, sequenced to facilitate learning and permit opportunities for the learner to participate and to receive feedback.

**Guidelines.** Statements of intended learning outcomes (behavioral or performance objectives) are logically supported by subject content relevant to achieving the outcomes. Both the learner and the instructor have a clear understanding of the intended outcomes and how they are to be achieved.

Content should be sequenced in a logical manner and should proceed from basic to advanced levels. Instructional methodologies should permit the learner to participate interactively and to receive feedback that strengthens and reinforces learning and measures progress.

5. **Requirements for Satisfactory Completion.** Requirements for satisfactory completion are established for each planned learning experience. These requirements are based on the purpose and intended learning outcomes. Participants should be informed of the requirements for satisfactory completion prior to their participation.

**Guidelines.** The requirements for satisfactory completion are established prior to the offering of the program or activity through the mutual agreement of the course coordinator, course director or other persons responsible for the overall CEU program. Requirements may be based on the ability of participants to demonstrate what they have learned, or some predetermined level of attendance at sessions, or a combination of performance and attendance. Programs that require the achievement

# **SH 200 Benefits**

## **SH 230 Continuing Education Units Plan**

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of certain performance levels should be based on the intended learning outcomes. Requirements which focus on attendance only should be high (e.g., 90 percent and above) and documented by such means as attendance rosters or sign-in sheets.

Participants should be informed in advance (e.g., continuing education announcement, letter of acceptance) of the requirements for satisfactory completion and should know that only those who meet those requirements will earn CEU.

6. **Assessment of Learning Outcomes.** Procedures established during program planning are used, when applicable, to measure the achievement of intended learning outcomes specified for the program or activity as they relate to changes in learners' knowledge, skills or attitudes.

**Guidelines.** Assessment refers to the measurement of individual performance in relation to intended learning outcomes. Assessments may be made during and on conclusion of the learning activity. Assessment made during the activity may help to reinforce learning and provide a point of reference for the progress of the learners.

The assessment procedure, its timing and its application are established as part of the planning process. Because the assessment procedure depends on the intended learning outcomes, they must be measurable or observable, clearly stated and focused on the level of performance expected of the learner. When a formal assessment of learning outcomes is to be a part of a program or activity, the purpose and nature of the assessment procedure is made known to the participants.

Assessment may take diverse forms, such as performance demonstrations under real or simulated conditions, written or oral examinations, written reports, completion of a project, self-assessment, or locally or externally developed standardized examinations. Moreover, assessments may be made during or at the conclusion of the program or activity, or after some elapsed time following the learning experience. When learning outcomes are formally assessed, the results should be entered on the individual learner's permanent record along with the number of CEU earned.

7. **Program Evaluation.** During the course of planning, a process is established to evaluate major aspects of the continuing education experience, i.e., organizational input; the design, content, content level and operation; and the extent to which intended learning outcomes were achieved.

**Guidelines:** The distinction between assessment and evaluation: "assessment" refers to the measurement of individual learning outcomes; "evaluation" refers to measures of the quality of the administration and operation and of the continuing education experience as a whole. Using only participant reaction surveys will not yield the data needed for an adequate evaluation of a continuing education experience. However, substantial and useful participant reaction surveys can be designed (1) to measure

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what the participants consider to be the benefits of the learning experience, (2) to determine participant satisfaction with the physical arrangements, or (3) for comparisons between different offerings or between the same offerings on different occasions. The evaluation process itself is one measure of the quality of a continuing education program or activity.

The importance of evaluating continuing education experiences for the individual learner, user groups, the sponsor or provider, and the field of continuing education cannot be overemphasized. Evaluation is a coordinated process carried on by the total system and its individual subsystems (the provider's organization and all facets of that organization that are involved in continuing education offerings). It consists of making judgments about programs and activities based on established criteria and observable evidence. Evaluation takes into account the process followed in the program planning effort and is intended to develop information aimed at answering the following questions:

- Did the learning experience and the instructional methods used result in individual behavioral change, i.e., the intended learning outcomes?
- Were the intended learning outcomes appropriate for the stated purpose of the learning experience and for the learners involved?
- Were the intended learning outcomes stated in measurable or observable terms?
- Were the program inputs (decision making during the planning process; fiscal, physical and instructional inputs of the provider) associated with the learning outcomes?
- Was there a clear relationship between the educational needs of the learners and the stated purposes of the learning experience?
- Was the input of representatives of the clientele group and potential learners during the needs analysis and identification phase of the planning process fully understood and communicated?
- Were the provider's philosophy, mission, structure, functions and processes effective and efficient in producing the learning outcomes intended for the learning experience?

Quality assurance and control of continuing education experiences are enhanced through long-range, systematic evaluation of what is intended in relation to what actually occurs. The difference can be used as the base for whatever change is needed to ensure that intended learning outcomes are attained. Sponsors and

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providers of continuing education may find evaluation results are a useful tool when accounting for the results of their programming efforts.

**LEE B. BRAWNER SCHOLARSHIP FUND**  
with funding from  
The Friends of the Metropolitan Library System

**POLICY**

A. To provide quality library service for the citizens of Oklahoma County, the Metropolitan Library System encourages its employees to improve their job skills and to develop their professional career potential. In support of this effort the Friends of the Metropolitan Library System established the Lee B. Brawner Scholarship Fund in recognition of his many years of service as the Executive Director of the library system. Under the program, scholarship award grants will be made to successful applicants upon completion of courses leading to completion of a job-related degree.

**B. Specific Objectives of the Program:**

1) To motivate library system employees to further their education by underwriting a portion of the costs for educational courses leading to an undergraduate, graduate or post-graduate degree.

2) To encourage employees to pursue degrees that will develop and broaden job skills, job knowledge and professional expertise.

3) To enhance employees' performance and/or prepare them for promotional opportunities within the library system.

4) To improve the library's potential for attracting and retaining highly qualified and experienced personnel in all fields of library employment.

**C. General Guidelines:**

Staff may apply for the scholarship reimbursement for degree-related courses that relate to their present position or that prepare them for a promotional opportunity with the library system. The study and course work must be completed on the employee's own time although their supervisors have the discretion to "flex" the employee's regular work schedule to help accommodate the course work.

## ELIGIBILITY

### A. Employee Eligibility

- 1) Regular, full-time employees who have received a satisfactory performance evaluation prior to the beginning of the semester for which they are enrolling are eligible to apply for scholarship funding.
- 2) An employee under disciplinary or performance probation at the time of application will not be eligible.

### B. Reimbursement Levels

- 1) Eligible employees may seek a maximum scholarship reimbursement of up to \$75 per undergraduate credit hour for a maximum of 6 credit hours per semester or up to \$100 per graduate credit hour for a maximum of 6 credit hours per semester--for tuition, books/materials and fees—for courses leading to an approved degree.
- 2) The scholarship fund will not underwrite other costs such as food, lodging or travel.
- 3) Individual scholarship award levels will be determined by the available funds and the number of eligible applicants.

### C. Submittal of Applications

- 1) Applications may be obtained from the Human Resources Office.
- 2) Applications must be made prior to the start of each semester per a schedule announced by the Human Resources Office.
- 3) The applications--in order to be considered--must have the written endorsement of the employee's immediate supervisor, who must verify that the proposed degree will enhance the employee's job performance or prepare the employee for a promotional opportunity.

### D. Review and Approval of Applications

- 1) A Scholarship Award Committee consisting of the Executive Director, Deputy Directors of the library system will consider eligible applicants prior to each Fall, Spring and Summer semesters. Member of the Scholarship Award Committee are not eligible for the scholarship program.
- 2) The committee will notify all applicants in writing of its decisions.

#### E. Reimbursement Payments

1) Upon receipt of grades for the course(s), scholarship awardees shall submit a copy of the final grade report, a fee statement which shows the number of hours completed, the title of the course(s), and the total tuition or related costs to the Human Resources Office within six weeks after course completion.

2) The scholarship reimbursement will be made within 45 days of the receipt of the above documentation.

#### F. Limitations

1) The minimum grade that will be acceptable for scholarship reimbursement will be "B", or "pass" in the case of pass/fail courses taken towards the attainment of the degree.

2) Only six (6) under graduate or three (3) graduate units taken on the pass/fail basis will be eligible for the scholarship program.

3) Employees who leave the employ of the Metropolitan Library System or who are terminated prior to completing reimbursable coursework forfeit their right to reimbursement.

4) Employees who do not complete courses, who receive an unsatisfactory grade or who do not follow the scholarship program procedures will not be eligible for reimbursement.

5) Employees receiving tuition or reimbursement from other scholarships or programs are only eligible to receive the net library scholarship cost for the course(s) tuition/other only after deducting the amount of such outside aid.

**METROPOLITAN LIBRARY SYSTEM**  
**APPLICATION FOR**  
**LEE B. BRAWNER SCHOLARSHIP FUND**

The Lee B. Brawner Scholarship Fund was established in 1991 by the Friends of the Metropolitan Library in recognition of his past twenty years of service as Executive Director of the Metropolitan Library System. The scholarship encourages library employees to improve their job skills and to develop their professional career potential. Scholarship grants are awarded to successful applicants upon completion of a course or courses leading to completion of an approved degree.

Name of applicant \_\_\_\_\_

(last)

(first)

(initial)

Library position \_\_\_\_\_

Library office/dept./agency \_\_\_\_\_

I have (check one)

\_\_\_\_\_ been accepted

\_\_\_\_\_ have applied for acceptance

in the following degree program:

Name of degree program \_\_\_\_\_

Name of university \_\_\_\_\_

I am applying for the scholarship for each of the following courses (indicate also the number of units per course):

\_\_\_\_\_

\_\_\_\_\_

I will begin the course(s) in the \_\_\_\_\_ semester.  
(year) (spring, fall, summer)

**RELATIONSHIP OF DEGREE**

Describe in 300 words or less on an attached sheet how this degree relates to your present position and/or prepares you for a promotional opportunity with the library system.



### **SUPERVISOR'S ENDORSEMENT**

I have reviewed the application and verify that the proposed degree program will enhance the employee's job performance and/or prepare them for a promotional opportunity.

---

Name/Title of Immediate Supervisor

---

Date

### **CERTIFICATION**

I hereby certify that I will adhere to the policy and procedures for this scholarship fund if I am awarded a grant.

---

Applicant

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(signature)

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(date submitted)



# *Leadership MLS*

*2007 Information and Application*

# *Leadership MLS*

## **Program Goals:**

The goal of Leadership MLS is to provide an encompassing view of the many issues associated with the field of library leadership. Areas to be covered include, but are not limited to, the following:

1. Common characteristics of leaders.
2. Promoting an environment of communication and team-building within an organization.
3. Organizational and human resource management.
4. Appropriate professional conduct and ethics associated with effective leadership.
5. Civic engagement and promoting a culture rich in diversity.

## **Leadership MLS is designed to:**

- ✱ Identify potential leaders within the library system.
- ✱ Allow employees interested in advancement an opportunity to enhance their leadership skills.
- ✱ Develop a pool of individuals who can assume leadership roles when the need arises.

## **The objectives for participants in Leadership MLS are:**

- ✱ Develop visionary leadership through practical hands-on experience and classroom training sessions.
- ✱ Develop awareness of external and internal social and political influences impacting the library system, resulting in effective communication strategies for disseminating information.
- ✱ Develop proactive strategies to address a shifting workplace environment.
- ✱ Gain an understanding of the overall operation of the library system and how each part works together to support the organization's mission.

### **Leadership Program Schedule:**

- ✱ Participants meet in conjunction with the Ad-Team meeting schedule starting May 9th and ending December 5th.
- ✱ Graduation and awards luncheon will conclude the 2007 Leadership MLS program on December 19th, 2007.

### **Leadership Program Times:**

9:15am – 11:30am – Ad Team Meeting (Lee B. Brawner Conference Room)

11:30am – 1:00pm – Luncheon & Leadership Topic Presentation

### **Criteria for Selection:**

- A. To provide quality library service for the citizens of Oklahoma County, the Metropolitan Library System encourages its employees to improve their job skills and to develop their professional career potential. In support of this effort, the Leadership MLS program is being proposed to seek out and develop current and future leaders within the Metropolitan Library System.
- B. Specific Objectives of the Program:
  - 1. To motivate library system employees to further develop their leadership by providing an in-house leadership development program to build and strengthen the leadership skills of the employees of the system.
  - 2. To encourage employees to participate in programs and opportunities that will develop and broaden their skills, knowledge and professional expertise required of their current or future career endeavors.
  - 3. To enhance employees' performance and/or preparation for promotional or advancement opportunities within the system.
  - 4. To improve the system's potential for attracting and retaining highly qualified and experienced personnel in all fields of library employment.
- C. General Guidelines:
  - 1. Employee Eligibility:
    - a. Regular, full-time employees may apply for admission to the MLS Leadership class.

- b. Employee must have received a minimum score of 3.0 on **each** standard area on his/her most recent performance appraisal for the period prior to the beginning of the MLS Leadership class.
    - c. Employee must have demonstrated successful 'above and beyond' behaviors in the categories of customer service, team work, and good-employee on his/her most recent performance appraisal for the period prior to the beginning of the MLS Leadership class.
    - d. An employee under disciplinary or performance probation at the time of application will not be eligible.
  - 2. Submittal of Applications:
    - a. Applications may be obtained by contacting the Planning Services Office or by download via the MLS Intranet.
    - b. Applications for submission must contain a letter of recommendation from the applicant's direct supervisor verifying participation in this leadership development opportunity. The letter should contain specific information regarding the applicant's leadership potential and skills he/she can bring to the class and the organization.
- D. Review and Approval of Applications:
- 1. The current MLS Executive Director and Deputy Executive Directors will compose the Selection Committee for considering the eligible applicants for participation in each Leadership MLS class. Members of the current Administrative Team are not eligible for selection for the Leadership MLS class as they will be serving as the mentors for the program.
  - 2. Participants will be chosen to participate based on the mission of the program and the information provided in the admission application, applicant's Leadership Belief Statement and their supervisor's letter of recommendation.
  - 3. Only participants who meet the established criteria will be selected to participate in the class. There is no pre-established minimum number of participants, but a maximum of 10 class members.
  - 4. The committee will notify all applications in writing of its decisions.

**Deadline for Submission:** Friday April 20<sup>th</sup>, 2007 by 4:30 pm  
**Submit to:** Planning Services Office % Kay Bauman

# *Leadership MLS*

## *Application for Admission*

### *Spring 2007*

Leadership is the cornerstone of any successful organization. To prepare and develop MLS employees for their current and future leadership positions within the organization a participatory practical study of leadership styles, qualities and practices will be undertaken by a class of participants during 2007. Leadership MLS will encourage selected employees to improve their job skills and to develop their professional career potential.

Applicant's Name: \_\_\_\_\_

(last)

(first)

(initial)

Library Position: \_\_\_\_\_

Library Office/Dept./Agency: \_\_\_\_\_

List Previous/Current Leadership Experiences at MLS:

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List any community/school/church leadership experiences:

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### **Leadership Belief Statement**

On an attached sheet, describe in 1000 words or less how your participation in the Leadership MLS class will benefit you, your current MLS position, and your future endeavors both at MLS and beyond. Sell yourself! Why should we invest in developing you as a current and future leader?

## **Supervisor's Letter of Recommendation**

I have reviewed this application and verify that the applicant's participation in the 2007 Leadership MLS class will enhance the employee's job performance and/or prepare him/her for a promotional opportunity. Additional information regarding this applicant can be located in the Letter of Recommendation I have included with the participant's application.

---

Name/Title of Immediate Supervisor

Date

## **Certification**

I hereby certify that I will adhere to the policy and procedures for the Leadership MLS class if I am selected as a participant. Failure to meet the minimum requirements will result in exclusion from the group and may impact my annual performance appraisal.

---

Applicant Name

---

Applicant Signature

Date

# **Stewardship of Human Resources**

## **SH 300 Employment**

*Revised: 3/97, 2/03, 1/06*

All employees, and all other persons, have certain rights and responsibilities that they can justly expect in their employment and other dealings with the Metropolitan Library System including equal employment opportunities, equal application of benefits, and expected behavior and conduct.

### **Policies**

#### **I. Employment**

It has been and continues to be the policy of the Metropolitan Library System to afford equal opportunity for employment to all qualified individuals regardless of race, color, religion, gender, age, national origin, veteran status, or any physical or mental disability except where age, sex or physical or mental ability is a bonafide occupational qualification or reasonable accommodation cannot be made. The Metropolitan Library System will take measures to ensure that it will:

1. Recruit, hire and promote all job classifications to further the equal opportunity principle cited above.
2. Base employment decisions on essential job requirements devoid of prohibited discriminatory practices. (See Section VIII, Item L for restrictions on the hiring of close relatives of commission members or staff.)
3. Eliminate artificial barriers to employment including non-valid qualifications and/or physical barriers restricting employment of the physically handicapped.
4. Ensure that promotion decisions are based on valid employee qualifications required for such advancement.
5. Ensure that all personnel actions such as compensation, benefits, transfers, layoffs, returns from layoff, and any Metropolitan Library System-sponsored employee training will be administered so as to further the equal opportunity principle cited above.
6. Make reasonable accommodation of physical and mental disabilities of employees or prospective employees and make reasonable accommodation of the religious beliefs of employees or prospective employees including their Sabbath and religious holiday observances.
7. The Library Commission's Administrative and Personnel Committee shall have the responsibility to monitor and review compliance with this policy and to make recommendations to the Administration from time to time as necessary. The



# **Stewardship of Human Resources**

## **SH 300 Employment**

*Revised: 3/97, 2/03, 1/06*

Human Resources Manager shall be the System's civil rights compliance officer to maintain and ensure fair and impartial practices and procedures.

### **II. Centralized Personnel**

The library system has established a centralized personnel function. The Human Resources Office is responsible for coordinating and monitoring the overall employment procedures of the library system. The Human Resources Manager coordinates advertising, job announcements, correspondence with applicants, screening and referral of applications, offers of employment and applicant notifications. Selection committees, agency/office heads, managers of library operations and supervisors are advised of their equal employment responsibilities by the Human Resources Manager.

# **SH 300 Employment**

## **SH 300.1 Employment Procedures**

*Revised: 3/97, 2/03*

### **Employment Procedures**

In order to monitor the results of the equal employment opportunity provisions, the Metropolitan Library System has the following procedures:

- I. Identify position vacancies to be filled by:
  - A. Title
  - B. Minimum and desirable qualifications
    - 1. Establish job description
    - 2. Establish education/experience/other requirements and preferences
    - 3. Establish equivalent qualifications
  - C. Establish salary range
  - D. Define conditions of employment
- II. Identify appropriate search procedures
  - A. Individual
  - B. Committee
- III. Recruitment of Applicants
  - A. Announcements
    - 1. Internal
    - 2. External
      - a. Placement services of colleges, universities and graduate library schools
      - b. Library clearinghouse for professional applicants
      - c. Local agencies
      - d. Other resources
  - B. Advertising
    - 1. Publications (appropriate labor markets)
      - a. Locally
      - b. Regionally
      - c. Nationally
    - 2. Job lines
    - 3. Other media
  - C. Establish a pool of qualified applicants without regard to race, color, religion, gender, age, national origin, veteran status, or physical or mental disability.

# **SH 300 Employment**

## **SH 300.1 Employment Procedures**

*Revised: 3/97, 2/03*

### **IV. Screening of Applications**

- A. Compare minimum and preferred qualifications to applicant's qualification
- B. Identify applicants for interview
- C. Interview selected applicants
- D. Select best qualified applicant

### **V. Reasons for Selections and Rejections**

- A. Identify and record reasons for selecting the successful applicant
- B. Identify and record reasons for the rejection of all applicants not selected

### **VI. Review and Notification**

- A. Review selection procedure to ascertain compliance prior to actual appointment of applicant
- B. Notify all applicants not selected that position has been filled

### **VII. Uniformed Services (Veterans) Employment and Reemployment**

The provisions of the Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA), as may be amended from time to time, shall over-ride other provisions of this policy and procedure when a conflict should exist.

# **SH 300 Employment**

## **SH 300.2 Administrative Procedure on Filing of Applications**

*Adopted: 10/86, Revised: 3/91, 2/03*

This procedure is to reaffirm the library's policy on promotion or transfer of employees with less than six months' tenure in a current position.

1. To help achieve efficiency and stability, it is in the library's best interest to discourage applications for promotion or transfer from employees who have worked less than six months in the library system.
2. Standing exceptions include the following instances:
  - A. A part-time employee seeking a full-time or designated three-fourths or half-time position, or
  - B. An employee with more than six months of service in the system, but who may not have six months of service in his or her present position, and whose past and current supervisors give positive performance evaluations, and whose previous and/or current position is similar in nature to the position to which the employee wishes to transfer or promote.
3. Other exceptions will be made to further the library's desire to continue to select the best-qualified applicant for any position.

# **SH 300 Employment**

## **SH 300.3 Administrative Directives on Employment Reference Checks**

***Adopted: 6/88, Revised: 2/03***

All requests for employment information, character references, etc. about any present or former employee must be forwarded immediately to the Human Resources Office to handle. The Human Resources Office will process these requests according to the following guidelines.

1. For telephone requests, the Human Resources Office will verify for correctness the information, which the caller already has regarding the present or former employee.
2. For written requests, the Human Resources Office will verify for correctness non-subjective information contained in the request and will provide other requested information if the employee has, by signature, authorized the release of the information.
3. For all requests, the Human Resources Office will provide only information that would be accessible under the Oklahoma Open Records Act. Information not subject to the Open Records Act or otherwise protected by statute will not be released.

# **SH 300 Employment**

## **SH 310 Prohibiting Future Hiring of, or Contracting to Hire, Close Relatives of Commission or Staff**

*Adopted: 6/86, Revised: 3/97, 2/03*

### Definition of "close relative:"

Spouse or child, parent, grandparent, grandchild, brother or sister of any current library employee and Commission member and their spouse's child, parent, grandparent, grandchild, brother or sister including relationships created by marriage such as a father-in-law, daughter-in-law, etc. A stepchild, legally adopted or foster child, stepparent, half-brother and half-sister are also considered a "close relative."

### **Policies**

1. Effective June 19, 1986, the Metropolitan Library System will not knowingly hire or contract with anyone for employment who is a close relative of any current library employee or Commission member.
2. Policy #1 does not apply to those closely related persons currently working for the system as employees or contractors as of that date; i.e., employed and related before this policy took effect.
3. Future employment applications or proposals to contract for employment will require applicants or prospective contractors for employment to attest that they are not a close relative of any current library employee or Commission member; willful misrepresentation of such relationship to obtain employment will be grounds for immediate termination of employment.
4. Unrelated employees or contractors working for the same supervisor or in the same library agency or office and who marry or become in-laws while so employed become subject to this policy.
  - A. One or the other of the newly related under those circumstances will be subject to transfer to a suitable position (determined by the system) under a different supervisor or in a new location.
  - B. The newly related couple will have the option of choosing who will transfer, if that option is in the best interests of the library system.
  - C. If the newly related couple is unable to reach agreement as to who will transfer, the library system will decide on the basis of least seniority in the system.
  - D. If no transfer opportunity arises that is mutually-agreeable to the system and the employee within six (6) months following notification of the need for the transfer, the library system may terminate the employment of the one with least seniority

**SH 300 Employment**  
**SH 310 Prohibiting Future Hiring of, or Contracting to Hire,  
Close Relatives of Commission or Staff**  
*Adopted: 6/86, Revised: 3/97, 2/03*

in the library system, subject to due process and grievance procedures when applicable.

5. While the Commission cannot legally prevent the appointment of new library commissioners who are closely related to library employees, the Commission strongly suggests that officials and bodies with appointive power avoid such practice.
6. In cases where a new Commission member is appointed who is closely related to a library employee, the latter will retain his or her employment status.

# **Stewardship of Human Resources**

## **SH 400 Performance Appraisal**

*Revised: 2/03*

### **Policy**

The performance of each employee is periodically evaluated in writing via the Performance Appraisal Summary. Each new full-time or designated part-time FTE (i.e., a part-time employee for which there is a full-time equivalent position in the classification plan, usually, but not always, paid from budget account 101) employee is evaluated informally at two and four months. Formal evaluation at six months will be conducted using the Performance Appraisal Summary Sheet. Subsequent evaluations using form MLS 109 are made at least annually. Supervisors have the option to initiate evaluations at any time to document requests for promotion, demotion, termination, transfer or to emphasize particular areas of concern in a subordinate's performance. Administration or staff members may request appraisals at any time.

### **Procedure**

1. The appraisal form will be sent by the Human Resources Office to the supervisor approximately one month in advance of the review date.
2. The supervisor prepares appraisal based on performance standards established with the employee at the beginning of the appraisal period.
3. The supervisor reviews the appraisal with the employee and together they review the performance standards in effect for the next performance appraisal.
4. The employee is provided with a copy of the appraisal and the performance standards for the next performance appraisal and signs for receipt of both.
5. The appraisal form and next set of performance standards are routed to the reviewing supervisor for comments and signature.
6. The reviewing supervisor routes these items to the reviewing administrator for comments and signature.
7. The reviewing administrator routes the form to the Human Resources Office.
8. The Human Resources Office initiates such action as appropriate under the salary administration policy, due process policy or grievance policy.



# **SH 400 Performance Appraisal**

## **SH 400.1 - Administrative Procedures**

*Adopted: 11/93, Revised: 2/03*

### **Procedure**

1. New Hires and Persons Moving from Part-Time (acct. 102) to Full-Time or Designated Full-Time Equivalents [FTE] (acct. 101)

New employees, rehired employees or employees promoted from part-time (budget acct. 102) to full-time or designated full-time equivalents (budget acct. 101) will be formally evaluated by the end of the first six months of employment in that position and will be eligible for a performance increase based on the rating on the performance appraisal providing that funds have been budgeted for that purpose for the fiscal year in which the six-month date falls. The date, six months after their date of hire, or part-time (acct. 102) to full-time or designated-FTE (acct. 101) promotion will become their annual review date. Although hired under acct. 101, this procedure will not apply to those individuals hired to work seasonally or as substitutes such as librarians, associate librarians or circulation clerks.

2. Promoted Employees

Employees (in budget acct. 101) promoted to a new position will be formally evaluated by the end of the first six months in the new position and will be eligible for a performance increase based on the rating on the performance appraisal providing that funds have been budgeted for that purpose for the fiscal year in which the six months falls. They will not be evaluated on their previous annual review date regardless of whether it falls prior to or after the six month review and, accordingly, will not be eligible for a performance increase upon that old annual review date. The annual review date for an employee (in acct. 101) who promotes will change and become the date six months after the promotion.

3. Reclassified Employees

In accordance with Policy and Procedure Manual Section VIII Item A, Subsection V. Paragraph C - Procedure for the Reclassification of Positions, "the review date of the incumbent is not changed by reclassification."

4. New Employees with Performance Appraisal Ratings Below 2.00 at Six Months

New employees, including part-time employees (acct. 102) moving to full-time or designated FTE (acct. 101) positions, whose performance rating for the initial six months in the position which fall below 2.00, unacceptable performance, will automatically be recommended for termination of employment by that rating. Extension of the initial review period will not be granted except in cases where the employee has been absent from work for a total of ten or more work days or on leave

# **SH 400 Performance Appraisal**

## **SH 400.1 - Administrative Procedures**

*Adopted: 11/93, Revised: 2/03*

protected by the Family and Medical Leave Act. In such cases, the six-month period will be extended for an equivalent number of workdays.

### **5. Employees with Performance Appraisal Ratings Below 2.00 on Annual or Special Reviews**

An employee with a rating below 2.00, unacceptable performance, on an annual or special review will be placed on performance probation which will require quarterly performance reviews. The employee's performance must improve to a higher performance rating and be maintained at an acceptable level. Any quarterly evaluation falling below the 2.00 level may be considered as a recommendation for termination of employment. Placement on or being on performance probation at the time of the annual review will disqualify the employee for any performance award until the next annual review. When a quarterly review falls on the annual review date, the performance appraisal should cover the entire year and not just the quarter.

### **6. Promoted Employees and Demotions**

An employee who has promoted from within the library system and who receives a rating below 2.00 at the six months evaluation immediately following the promotion, will be demoted back to the previous position providing a vacancy exists thereby creating a demotion opportunity. If no demotion opportunity exists, the employee can be terminated based on performance.

### **7. Other Performance Reviews and Demotions**

An employee receiving a performance appraisal rating below 2.00 on an annual review or a rating below 2.00 while on performance probation, who has on at least one performance appraisal received an acceptable rating in the present position, will be eligible to be considered for demotion to a different position for which he/she meets the qualification if such a position is available and is to be filled.

# **SH 400 Performance Appraisal**

## **SH 400.2 Procedure for Granting Performance Awards for Part-Time Pages**

*Adopted: 3/94, Revised: 2/03, 1/06*

The following alternate procedures are approved for granting performance awards for part-time pages.

### **Eligibility**

The individual must have completed a minimum of six months of employment with the library system in the capacity of part-time page.

### **Effective Date**

All awards will be granted during the period of January 1 through June 30 of the calendar year. Awards may be granted annually (providing funds are budgeted for that purpose) until an individual has reached the maximum salary for a part-time page.

Individuals completing six months of service prior to January 1 are eligible for the appropriate increase upon the first day of any pay period after January 1 upon submittal by the supervisor of the appropriate evaluation or ranking order.

Individuals completing six months of service after January 1 when being individually evaluated under Option A or individuals completing six months of service after the preparation of the ranking order under Option B will be eligible for the appropriate percentage increase on the first day of the next pay period after completing six months providing that the increase falls within the effective date window of opportunity.

### **Funding**

Performance awards can be granted only in those fiscal years during which funds are budgeted for this purpose.

### **Choice of Options**

Each manager of library operations may choose either Option A or Option B (listed below) as the procedure for use for all part-time pages at that library. The decision to change from one option to the other can only be made once annually and must be reported to the Human Resources Office at that time. Once an option is selected, it will remain effective for the entire fiscal year.

# **SH 400 Performance Appraisal**

## **SH 400.2 Procedure for Granting Performance Awards for Part-Time Pages**

*Adopted: 3/94, Revised: 2/03, 1/06*

### **Part-time Page Performance Award Options**

#### **Option A**

Individual Performance Standards

##### Involves:

Individual review dates  
Setting goals and standards  
Performance appraisal

##### Amounts:

Use of award guide which is  
used for full-time employees and  
adopted each fiscal year

#### **Option B**

Ranking Order of Staff

##### Involves:

Ranking individuals on  
basis of most productive to  
least productive based on  
selected written criteria

##### Amounts:

Amounts may vary with the most  
productive employees getting highest  
percentage increases and the least  
productive getting the lowest or zero  
percentage; both the percentage and  
the number of hours worked by the  
individuals must be averaged so as not  
to exceed the fixed dollar amount  
available for performance award

Regardless of option, no employee's hourly rate may exceed the maximum of the range established for part-time page under the part-time pay plan. Bonuses, as provided for full-time employees, will not be applicable to part-time employees covered under these procedures.

##### Procedure:

Manager of library operations will  
be responsible for tracking six  
month and annual review dates  
for pages and for selected written  
criteria appraisal forms; completed  
forms should be sent to the  
Human Resources Office in the  
same manner as for full-time  
employees.

##### Procedure:

Manager of Library Operations will  
prepare annually the order ranking of  
employees and determinations based on  
reproduction of performance and submit  
it to the Human Resources Office so as  
to arrive at any time between January 1  
and June 1; 26 pay periods must elapse  
before individual can receive another  
performance award

# SH 400 Performance Appraisal

## SH 400.3 Model Merit Increase Guide

The increase percentages shown here are strictly an example and are no way binding for any particular fiscal year.

Quartile	1	2	3	4
Performance Rating	Performance Awards % Increase			
3.50 to 4.00	6	6	5	5
2.75 to 3.49	3-5	3-4	2-3	2-3
2.00 to 2.74	2-3	1-2	0	0
1.00 to 1.99	0	0	0	0

### Performance Ratings

Rating 3.50 to 4.00 - Performance Substantially Exceeds Standards

All standards were met and most were clearly exceeded. The individual performance in important job objectives goes beyond what is required.

Rating 2.75 to 3.49 - Performance Meets All Standards

The individual performance is fully satisfactory and all performance standards and objectives were met at pre-established levels of proficiency.

Rating 2.00 to 2.74 - Performance Acceptable/Some Improvement Needed

The basic and/or most important standards are being met satisfactorily; however, some areas need improvement. This is a way of telling the employee that there are some areas in his/her performance that are less than satisfactory and need to be addressed.

# **SH 400 Performance Appraisal**

## **SH 400.3 Model Merit Increase Guide**

Rating 1.00 to 1.99 - Unacceptable Performance

The individual performance is unacceptable, with the basic and/or most important standards not being met satisfactorily. With this rating, the employee should be on performance probation as well as an improvement program for these areas of responsibility.

# SH 400 Performance Appraisal

## SH 400.4 Merit Increase Guide

FY 06-07

Quartile	1	2	3	4
Performance Rating	Performance Awards % Increase			
3.50 to 4.00	3	3	3	3
2.75 to 3.49	2	2	2	2
2.00 to 2.74	1	1	1	1
1.00 to 1.99	0	0	0	0

### Performance Ratings

Rating 3.50 to 4.00 - Performance Substantially Exceeds Standards

All standards were met and most were clearly exceeded. The individual performance in important job objectives goes beyond what is required.

Rating 2.75 to 3.49 - Performance Meets All Standards

The individual performance is fully satisfactory and all performance standards and objectives were met at pre-established levels of proficiency.

Rating 2.00 to 2.74 - Performance Acceptable/Some Improvement Needed

The basic and/or most important standards are being met satisfactorily; however, some areas need improvement. This is a way of telling the employee that there are some areas in his/her performance that are less than satisfactory and need to be addressed.

# **SH 400 Performance Appraisal**

## **SH 400.4 Merit Increase Guide**

Rating 1.00 to 1.99 - Unacceptable Performance

The individual performance is unacceptable, with the basic and/or most important standards not being met satisfactorily. With this rating, the employee should be on performance probation as well as an improvement program for these areas of responsibility.



# SH 500 Rights of Employees

## SH 510 Civil Rights

*Revised: 3/97, 2/03, 9/07*

### Policy

All employees, and all other persons, have certain rights and responsibilities that they can justly expect in their employment and other dealings with the Metropolitan Library System including equal employment opportunities, equal application of benefits, expected behavior and conduct, and the benefit of due process prior to the exclusion of legitimate property or liberty rights.

### Regulations

The Metropolitan Library System will take measures to ensure that:

- ☒ All employees are aware and understand the goals of equal employment opportunity and freedom from illegal harassment. This communication is crucial to the System's success in achieving its goals. Employment policies will be communicated to all agency heads and supervisors who are involved with appointment, transfer and promotion of the System's personnel. This policy will be furnished to each new employee of the System. Policies on illegal harassment will be communicated to vendors and customers as needed.
  - ☒ Processing of complaints of discrimination or harassment will be done fairly and impartially and free from reprisal and retaliation. Additionally, any employee who feels that he or she has not been afforded equal opportunity for promotion or transfer or other terms or conditions of employment because of prohibited discriminatory factors or subjected to illegal harassment of any form may submit a complaint as provided in SH 510.1 Civil Rights Complaint Resolution Procedures.
  - ☒ No action will be taken against an employee for making a complaint in good faith, even if any facts alleged in the complaint are not confirmed by subsequent investigation.
1. Gender Harassment or Discrimination  
The library system will not tolerate gender discrimination or harassment of any employee or volunteer by any other employee or volunteer. Any employee or volunteer who feels that s/he has been or are actively being discriminated against or harassed because of his/her gender by another employee or volunteer needs to immediately follow the complaint resolution procedure contained in SH 510.1. Complaints of sexual harassment by a customer or vendor should be submitted using the procedure for reporting unusual incidents.
  2. Racial or Ethnic Harassment or Discrimination  
The library system will not tolerate racial or ethnic discrimination or harassment of any employee or volunteer by any other employee or volunteer. This includes discrimination or harassment based on race, color

# **SH 500 Rights of Employees**

## **SH 510 Civil Rights**

***Revised: 3/97, 2/03, 9/07***

or national origin. Any employee or volunteer who feels that s/he has been or are actively being discriminated against or harassed because of race or ethnicity by another employee or volunteer needs to immediately follow the complaint resolution procedure contained in SH 510.1. Complaints of racial or ethnic harassment by a vendor or customer should be submitted using the procedure for reporting unusual incidents.

### **3. Religious Harassment or Discrimination**

The library system will not tolerate religious discrimination or harassment of any employee or volunteer by any other employee or volunteer. Any employee or volunteer who feels that s/he has been or are actively being discriminated against or harassed because of his/her religious beliefs by another employee or volunteer needs to immediately follow the complaint resolution procedure contained in SH 510.1. Complaints of religious harassment by a vendor or customer should be submitted using the procedure for reporting unusual incidents.

### **4. Age Harassment or Discrimination**

The library system will not tolerate discrimination or harassment based on the age of any employee or volunteer by any other employee or volunteer, except in cases where state or federal law places minimum age requirements for work in certain types of employment, the number of hours an individual of a certain age may work, and the time of day an individual of a certain age may work. Any employee or volunteer who feels that s/he has been or are actively being discriminated against or harassed because of his/her age by another employee or volunteer needs to immediately follow the complaint resolution procedure contained in SH 510.1. Complaints of age harassment by a vendor or customer should be submitted using the procedure for reporting unusual incidents.

### **5. Veteran Status Harassment or Discrimination**

The library system will not tolerate discrimination or harassment based on veteran status of any employee or volunteer by any other employee or volunteer. Any employee or volunteer who feels that s/he has been or are actively being discriminated against or harassed because of his/her veteran status by another employee or volunteer needs to immediately follow the complaint resolution procedure contained in SH 510.1. Complaints of harassment because of veteran status by a vendor or customer should be submitted using the procedure for reporting unusual incidents.

### **6. Physical or Mental Disability Harassment or Discrimination**

The library system will not tolerate discrimination based on physical or mental disability, except where physical or mental ability is a bonafide occupational qualification or reasonable accommodation cannot be made.

# **SH 500 Rights of Employees**

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***Revised: 3/97, 2/03, 9/07***

Nor will the library system tolerate harassment based on physical or mental ability of any employee or volunteer by any other employee or volunteer. Any employee or volunteer who feels that s/he has been or are actively being discriminated against or harassed because of his/her physical or mental disability by another employee or volunteer needs to immediately follow the complaint resolution procedure contained in SH 510.1. Complaints of harassment because of physical or mental disability by a vendor or customer should be submitted using the procedure for reporting unusual incidents.

### **7. Firearms in Library Facilities**

No person shall carry a firearm, concealed or otherwise, into any library facility or library vehicle unless licensed to carry one under state or federal law. Under current law, possession of a Self-Defense Act Concealed Carry Permit is not sufficient licensing as all library facilities are owned or operated by a public agency for public services. The Executive Director or manager of the facility may authorize other individuals to bring firearms into library facilities for special events, activities, displays, theatrical performances, living history presentations, etc. In situations where unauthorized firearms are observed, contact 911 and then the facility supervisor. Employees violating this provision are subject to disciplinary action including termination of employment in addition to any criminal prosecution. Members of the public, whether customers, visitors, vendors or contractor personnel, are subject to revocation of library privileges and/or contracts for violation of this provision in addition to criminal prosecution.

### **8. Violence in the Workplace**

No employee or volunteer shall engage in acts of physical violence on or verbal abuse of any other person while in a library facility or library vehicle or while engaged in library business except in the case of acts of self-defense. No employee or volunteer will communicate by voice, mail, phone or any other means any threat of violence or abusive statement from any library facility or library vehicle or to any one in a library or library vehicle. Complaints of threats of physical violence or verbal abuse from other employees or volunteers should be handled through the Grievance Procedure SH 520.1. Employees violating this provision are subject to disciplinary action including termination of employment in addition to any criminal prosecution. Members of the public, whether customers, visitors, vendors or contractor personnel, are subject to revocation of library privileges and/or contracts for violation of this provision in addition to criminal prosecution. Complaints of threats of physical violence or verbal abuse from customers or vendors should be reported using the procedure for reporting unusual incidents.

# **SH 500 Rights of Employees**

## **SH 510 Civil Rights**

***Revised: 3/97, 2/03, 9/07***

### **9. Compliance**

If the persons responsible for personnel actions or employees in their personal actions do not abide by the spirit as well as the letter of these policies and procedures, they are subject to disciplinary action including termination of employment.

# **SH 500 Rights of Employees**

## **SH 510.1 Civil Rights Complaint Resolution Procedure**

*Original adopted/revised: 3/97, 2/03, 9/07*

### **Procedures**

The Civil Rights Complaint Resolution procedure covers employment-based discrimination and sexual, racial or ethnic harassment complaints as identified in SH510 Civil Rights Policy.

1. based on race, color, religion, gender, age, national origin, veteran status, or any physical or mental disability or subjected to sexual, racial or ethnic harassment should discuss the matter with either his/her immediate supervisor or any administrative team member. If discussed with an immediate supervisor, the supervisor must notify an administrative team member of the matter. Any employee or volunteer who feels that s/he has been discriminated against
2. In cases where an administrative team member is alleged to be the discriminating or harassing party or where the administrative team member is unable to resolve the matter, the employee or volunteer should discuss the matter with the Executive Director.
3. In cases where the Executive Director is alleged to be the discriminating or harassing party, the employee or volunteer should take the matter to the chairperson of the Administrative and Personnel Committee of the library commission. Contact information for the Administrative and Personnel Committee chairperson is available on the MLS website.
4. The Metropolitan Library System via this policy endeavors to resolve any complaint in these types of matters. Therefore, an employee or volunteer alleging illegal discrimination or harassment is expected to complete these administrative complaint resolution procedures before presenting the matter to the Oklahoma Human Rights Commission, the U.S. Equal Employment Opportunity Commission or the courts.

# **SH 500 Rights of Employees**

## **SH 511 Complaint Resolution**

*Adopted: 9/07*

### **Policy**

The Complaint Resolution policy provides the mechanism for employee or volunteer complaints regarding conditions of work, interpretation of policies and procedures, or any other complaint that is not specifically covered by the grievance or civil rights policies and assures employees or volunteers who present a complaint in good faith will be free from restraint, reprisal or retaliation.

### **Regulations**

1. Any employee or volunteer may present a complaint.
2. A complaint regarding an immediate supervisor or an administrative team member may be presented to the next level supervisor.
3. Employees and volunteers must complete the procedures outlined in SH 511.1 – Complaint Resolution Procedures.
4. No action will be taken against an employee for filing a complaint in good faith, even if any facts alleged in the complaint are not confirmed by subsequent investigation.

# **SH 500 Rights of Employees**

## **SH 511.1 Complaint Resolution Procedures**

*Adopted: 9/07*

### **Procedures**

Complaint Resolution procedures list the appropriate steps for presenting employee or volunteer complaints regarding conditions of work, interpretation of policies and procedures, or any other complaint that is not specifically covered by the grievance or civil rights policies.

1. Any employee or volunteer who feels that he or she has a complaint regarding work conditions or interpretation of policies or procedures must first communicate this with his or her immediate supervisor. The supervisor will then counsel the employee on the appropriate plan of action based on the complaint.
2. If the employee or volunteer has a complaint regarding the supervisor, the employee must request a meeting with the next level supervisor. The next level supervisor will then counsel the employee on the appropriate plan of action based on the complaint.
3. This plan of action may include requiring that the employee present the complaint in writing.

# **SH 500 Rights of Employees**

## **SH 520 Grievance Policy**

***Adopted: 2/81, Revised 12/02, 7/06, 9/07***

### **Policy**

The Grievance Policy serves to assure employees that their grievance issues will be considered fairly and without undue delay, and that any employee who presents a complaint in good faith shall be free from restraint or reprisal.

### **Regulations**

1. A grievance can be filed for the following work related issues:
  - a. pay increases
  - b. promotions and/or demotions
  - c. performance evaluations
  - d. suspensions
  - e. terminations
  - f. written or oral reprimands
2. All full-time and designated part-time FTE (i.e., one-half time, three-fourths-time, four-fifths-time, etc. and budgeted in Account 101) employees with at least six months' service in the system shall have the right to appeal through the proper grievance channels on matters which directly affect them. Employees must follow procedures outlined on SH 520.1 Grievance Policy-Procedures.
3. If the grievance concerns a termination, the affected individual's employment status with the library system will be terminated. However, if the final decision in the grievance procedure is rendered in favor of the grievant, the individual shall be reinstated with no loss of salary, fringe benefits or seniority to that employee as follows:
  - a. The individual opted for continuation of coverage under COBRA, made timely premium payments as required by COBRA, and returns to "actively at work" status within the eighteen (18) months of COBRA eligibility, the individual will be reinstated to the Employee Benefit Plan and other such insurance plans as may be provided by the library system. The library's share of insurance premiums will be reimbursed to the individual only if the final decision favors reinstatement of the grievant.
  - b. If the individual opted not to have COBRA continuation of coverage, for whatever reason, or failed to make timely premium payments as required by COBRA, the reinstated employee will be treated as a new hire and subject to all provision of the Employee Benefit Plan for new employees.



# **SH 500 Rights of Employees**

## **SH 520 Grievance Policy**

***Adopted: 2/81, Revised 12/02, 7/06, 9/07***

4. No action will be taken against an employee for filing a grievance in good faith, even if any facts alleged in the grievance are not confirmed by subsequent investigation.

# **SH 500 Rights of Employees**

## **SH 520.1 Grievance Procedures**

***Adopted: 2/81, Revised 12/02, 9/07***

### **Procedures**

The Grievance Procedures detail the steps that must be taken when an employee has a complaint that falls into the categories that may be grieved as identified in the SH520 Grievance Policy.

**Step 1:** An employee shall first discuss a grievance with his/her immediate supervisor in an attempt to reach a reasonable conclusion. If the grievance involves an improper action by a direct supervisor, the employee may go directly to a Human Resources representative or the next level supervisor who will then counsel the employee on the appropriate plan of action.

Such discussion shall be initiated within five (5) working days from the date of the incident complained of, or within five (5) working days from the date the employee became aware of the incident, whichever is later.

In this step, it is not mandatory to have the grievance in writing. This step is for employees to discuss problems with their supervisor to foster better understanding. In every instance, the supervisor and employee are encouraged to settle the matter between them.

The supervisor's decision shall be given to the employee within five (5) working days. \*

**Step 2:** A grievance not resolved at Step 1 must then be presented in writing by the grievant within five (5) working days\* to the next level supervisor, who will review the grievance, discuss it with all concerned, and render a decision in writing within five (5) working days\* to the employee, with a copy to the supervisor. If the next level supervisor in Step 2 is the Executive Director, Step 3 & 4 are not applicable.

**Step 3:** If not satisfied with the decision in step 2, a grievant has five (5) working days\* from the point of receiving the decision in which to appeal, in writing, to the Director of Human Resources or to a person designated by the Executive Director to act in the Director of Human Resources' absence, who will conduct a review of the matter. This review might include gathering facts or interviewing appropriate parties. The Human Resources representative will present the findings to the Executive Director within ten (10) working days after the conclusion of the review. The Executive Director will make a decision within fifteen (15) working days and notify all parties.

# **SH 500 Rights of Employees**

## **SH 520.1 Grievance Procedures**

***Adopted: 2/81, Revised 12/02, 9/07***

Step 4: Either party may appeal the decision of the Executive Director by requesting a review, in writing and within five (5) working days\*, by the Administrative and Personnel Committee of the Library Commission. The Committee may review all previous testimony and evidence, conduct an investigation or interview affected parties if it deems necessary, and render the final decision, to be implemented by the Executive Director.

\* *Note: The Executive Director may extend deadlines due to extenuating circumstances.*

# SH 500 Rights of Employees

## SH 530 Due Process Hearing in Certain Employment Actions

*Adopted: 6/85, Revised: 4/90, 2/03, 9/07*

### Policy

The Due Process Hearing in Certain Employment Actions policy ensures the procedural due process of law as required by the Fourteenth Amendment to the United States Constitution. The United States Supreme Court has declared that before any action can be taken against an employee of a governmental entity, who has a reasonable expectation of continued employment, which would result in the loss of liberty or property rights, that employee must be given the opportunity to have a meaningful pre-action hearing to determine whether there are reasonable grounds to believe that the charges against the employee are true and support the proposed action.

To comply with this decision, the Metropolitan Library Commission hereby adopts the following definitions:

Liberty rights as defined by the court protect the individual from action, which would damage the employee's reputation, good name, standing in the community or curtailment of opportunities for future employment.

Property rights as defined by the court protect the individual's continued expectation of employment and include actions, which would result in suspension, demotion or termination of employment.

### Regulations

1. Before an action can be taken by the library against an employee who has a reasonable expectation of continued employment that would result in suspension, termination or demotion, the employee will be given the opportunity to have a meaningful pre-action hearing to determine whether there are reasonable grounds to believe that the charges against the employee are true and support the proposed action.
2. The employee is to be given either oral or written notice of the charges, an explanation of the evidence and an opportunity to respond to the charges.
3. When the proposed action involves termination of employment, the employee may be placed on suspension with pay pending a decision in the pre-action hearing or may be directed to continue working regularly scheduled hours.
4. This pre-action hearing does not preclude an eligible employee from any right to appeal the action after it has been implemented through the proper grievance procedure.
5. Nothing in this policy prohibits the library from terminating employees as a result of reductions in force, reorganizations, or lay-offs for economic or budgetary reasons.

# **SH 530 Due Process Hearing in Certain Employment Actions**

## **SH 530.1 Due Process Procedures**

***Adopted: 6/85, Revised: 2/03; 9/07***

The Due Process Procedures implement the policy of the Metropolitan Library Commission ensuring procedural due process of law as required by the Fourteenth Amendment to the United States Constitution.

### **Procedure**

Before any action is taken that results in the suspension, demotion or termination of employment of a library employee who has a reasonable expectation of continued employment the following procedures will be followed:

1. When a supervisor believes that there is sufficient cause and evidence to discipline an employee through suspension, demotion or to terminate an employee, the supervisor will notify his/her own supervisor.
2. That reviewing supervisor must study the evidence and, if in agreement, notify the Director of Human Resources of the proposed action.
3. When the proposed action involves termination of employment, the employee may be placed on leave with pay, with the approval of the Executive Director, until a decision is reached. Otherwise, the employee will be expected to continue to work the scheduled hours.
4. The Director of Human Resources or other individual designated by the Director of Human Resources, serving as hearing officer, will establish a time, date and place for a pre-action hearing and will notify the affected employee, the supervisor and agency head of the hearing. At that time, the employee will be given notice of the charges and an explanation of the evidence. The employee may waive the right to a hearing or may request that the hearing go forward.
5. At the hearing, the charges will be summarized, the evidence will be recapped and the employee will be given the opportunity to respond orally, in writing or both.
6. The hearing officer will render an opinion within seventy-two (72) working hours of the close of the hearing and that opinion will be forwarded to the Executive Director. The hearing officer must determine the following:
  - a. whether or not there are reasonable grounds to believe that the charge(s) are true
  - b. whether or not the recommended action is appropriate for the charge(s)
7. The Executive Director has the following options:
  - a. When the decision indicates that there are reasonable grounds to believe that the charges are true the Executive Director may direct the implementation of the action or an alternate action.

# **SH 530 Due Process Hearing in Certain Employment Actions**

## **SH 530.1 Due Process Procedures**

***Adopted: 6/85, Revised: 2/03; 9/07***

- b. When the decision indicates that there are not reasonable grounds to believe that the charges are true, the Executive Director may direct that there be no further action taken.

*Note:* This pre-action hearing does not preclude an eligible employee from any right to appeal the action after it has been implemented through the proper grievance procedure.

# SH 500 Rights of Employees

## SH 540 On-the-Job Injuries Workers' Compensation

*Revised: 9/98, 2/03*

### Policy

As prescribed by State Law, the Metropolitan Library System provides Workers' Compensation Insurance to cover medical expenses resulting from on-the-job injuries and to reimburse the amount stipulated by State Law for income lost because of such injuries.

**Note:** *The term, "on-the-job injuries," used in the above policy statement and in the following specific policies and procedures, means ANY WORK-RELATED INJURIES OR ILLNESSES COVERED BY WORKERS' COMPENSATION INSURANCE. All employees, full-time or part-time, are covered immediately by workers' compensation insurance for on-the-job injuries and occupational illnesses.*

### Specific Policies

1. Covered medical expenses; physicians and medical facilities.
  - A. In the case of an emergency life or limb threatening injury, the employee should be taken or go to the nearest medical facility for treatment. (call 911)
  - B. If the injury is not of an emergency nature, contact the doctor selected by the employee at the original sign-up for workers' compensation or any of the doctors on the workers' comp provider list that is available at each location.

In both emergency and non-emergency cases, supervisors or individuals in charge need to notify the certified workplace medical plan provider.
  - C. The injured worker is expected to comply with requests from the library system to provide necessary injury report data and physicians statements; also, to be examined by additional physicians/ clinicians (other than the employee's choice) designated by the library system and/or representatives of the library for workers' compensation.
2. Income reimbursement for time lost because of injury on-the-job.
  - A. A worker will not be docked or charged leave for time off due to certified disability from injury if the time off is so brief that it is not covered by Workers' Compensation Insurance; however, all worker's compensation absences will be considered FaMLA leave, if FaMLA qualifying.
  - B. As soon as it is determined that the certified disability lasts longer than the workers' compensation insurance waiting period for coverage, the injured worker who has no accrued leave will be removed from the library system's

# **SH 500 Rights of Employees**

## **SH 540 On-the-Job Injuries Workers' Compensation**

*Revised: 9/98, 2/03*

payroll; the injured worker who has available leave will be given the following options:

- i. Remain on the payroll and use available leave to make up the difference between Workers' Compensation and regular library pay, or,
  - ii. Go off the payroll
- C. The option of remaining on the payroll ends when the available leave balances reach zero.
- D. The library system will cease all library contributions for the injured employee's group medical insurance and other benefits after the FaMLA coverage period is exhausted or after the employee goes off the payroll, which ever is the longer period. (FaMLA leave and paid leave run concurrently.)
- E. The worker receiving Workers' Compensation and no library pay after the FaMLA coverage period is exhausted may arrange to continue paying for benefits previously paid by the library system and/or paid by payroll deductions, such as dependent's medical insurance, credit union deposits, supplemental life insurance, in accordance with the time limitations of individual plans or to discontinue such payments and benefits.

### **3. Job retention rights of injured employee**

The library system may not discharge, or, except for non-payment of premiums, terminate any group health insurance of any employee because the employee has in good faith:

- 1. Filed a claim;
- 2. Retained a lawyer for representation regarding a claim;
- 3. Instituted or caused to be instituted, any proceeding under the provision of the state workers' compensation code;
- 4. Elected to participate or not to participate in a certified workplace medical plan.

The library system may not discharge any employee during a period of temporary total disability solely on the basis of absence from work.

After an employee's period of temporary total disability has ended, the library system is not required to rehire or retain any employee who is determined to be physically unable to perform his or her assigned duties.



# **SH 500 Rights of Employees**

## **SH 540 On-the-Job Injuries Workers' Compensation**

*Revised: 9/98, 2/03*

### **4. Return to work**

#### **A. Leave of absence for twelve weeks or less**

An injured employee who returns to work within the FaMLA coverage period after being removed from the payroll is eligible to return to the same or equivalent position with the library system. Annual leave and sick leave accumulated to that point will be credited to the employee.

#### **B. Long-term\* leave of absence**

If an injured employee is unable to return to work within the FaMLA coverage period or balance of accrued leave, whichever is greater, the library system cannot and will not assure a return in the same or a position equivalent to that which the employee held at the time of the on-the job injury; however, the library system will consider placement of the employee in a similar or lower grade position for which the employee is qualified if the employee is given a medical release to return to work. Annual leave and sick leave accrued from the time of the disabling injury through the FaMLA coverage period will be credited to the employee.

\*"Long-term" is defined here as a period exceeding the FaMLA coverage period. "Temporary (total and partial) disability" can be declared for periods up to 150 weeks by state courts; however, an employer has the right to seek a ruling declaring an injured worker's disability "permanent and stationary" instead of "temporary" at any given point.

#### **C. Resignation**

The failure to report to work within two weeks (14 calendar days) following a valid medical release to return to work shall be treated as a resignation and a termination of all rights of employment. The refusal to accept an offer of re-employment in a similar or reasonably comparable position shall also be treated as a resignation.

# **SH 540 On-the-Job Injuries Workers' Compensation**

## **SH 540.1 On-the-Job Injuries Workers' Compensation Administrative Procedures**

*Revised: 2/03; 4/06*

### **Procedures**

1. When a person is injured while on duty for the library system, and requests professional medical attention or is judged by a supervisor or other responsible library employee to need professional medical attention, the injured person will be sent immediately to a medical facility; depending on circumstances--

***In life or limb cases:***

- A. To the nearest appropriate emergency facility, or,

***In lesser cases:***

- B. To the pre-designated physician chosen by the employee, or,
- C. To one of the physicians or medical facilities in the network of the certified workplace medical plan that the library has chosen.

In life or limb cases, after arranging for transport to the appropriate emergency facility, the supervisor, or person-in-charge, must contact CompChoice, the library system's certified workplace medical plan provider at (405) 848-3595. In lesser cases, CompChoice must be contacted prior to referral for treatment.

2. Within 48 hours, the injured employee's supervisor will submit a completed MLS Form, "INJURED EMPLOYEE / SUPERVISOR'S FIRST REPORT OF INJURY." Complete this form and submit a copy to your administrative team member and a copy to the Human Resources Office regardless of whether or not the employee had to leave the library workstation because of the injury.
3. The system's Human Resource Office will be responsible for submitting all official forms required by the Workers' Compensation Insurance carrier and the worker's compensation court.
4. The injured employee will report to his or her supervisor by telephone at least once a week or make other arrangements with the supervisor, who may waive this reporting requirement.

# SH 500 Rights of Employees

## SH 550 Health Information Privacy Policy

*Adopted: 4/04 7/06*

### Background and Purpose

In 1996, the United States Congress passed the Health Insurance Portability and Accountability Act that required the U.S. Department of Health and Human Services, Office of Civil Rights Compliance to adopt Privacy Rules regarding the use of Personal Health Information. These rules became effective upon small employers, medical providers and medical plans, like the Library System's, on April 14, 2004.

The primary purpose of the Privacy Rules is to protect all "individually identifiable health information" held or transmitted by a covered entity or its business associates, in any form or media, whether electronic, paper, or oral. The library falls under the "covered entity" definition because of the self-funded medical/dental plan and the flexible benefits plan and to a lesser extent because of the vision insurance plan and the Employee Assistance Program. These four plans make up the "organized health care arrangement" of the Library System.

Provisions to accomplish this purpose are far reaching and impose strict standards with considerable violation penalties.

### Definitions

Individually identifiable health information is information, including demographic data that relates to:

- the individual's past, present or future physical or mental health or condition,
- the provision of health care to the individual, or
- the past, present, or future payment for the provision of health care to the individual, and that identifies the individual or for which there is a reasonable basis to believe can be used to identify the individual. Individually identifiable health information includes many common identifiers (e.g., name, address, birth date, Social Security Number, etc.).

### Policies

1. Employees, volunteers, business associates and the Library System are prohibited from knowingly or intentionally releasing any individually identifiable health information about another employee, employee's dependent or volunteer, except under circumstances authorized in the Privacy Rules.
2. Any employee who does so will be subject to disciplinary action ranging from significant incident documentation up to and including termination of employment. Any volunteer who does so will be subject to sanctions up to and including discontinuance of their volunteer service. Any business associate who does so will be subject to sanctions up to and including the termination of their services or non-renewal of their service contracts or agreements.

# SH 500 Rights of Employees

## SH 550 Health Information Privacy Policy

*Adopted: 4/04 7/06*

3. Protected health information cannot be used by the Library System, its managers and/or supervisors to impact the hiring of applicants or the promotion or termination of employees.
4. When reporting an absence for sickness or for a doctor or dental appointment, an employee is not required to identify the nature of their illness, injury or physical or mental condition to their supervisor. The supervisor can only request the anticipated duration of the absence and, upon the employee's return to work, if there are any restrictions or limitations.
5. If information is provided to the supervisor or to another employee for the purpose of relaying the information to the supervisor, the information must be treated as confidential unless the employee provides prior written consent on a case-by-case basis. A spouse, family member, etc. cannot give consent for the employee and an employee cannot give consent to release information on a spouse, or other relative, except for a minor child.
6. In instances when an employee believes that the absence is protected under the Family and Medical Leave Act (FMLA), the employee should call the Human Resources Office to have a determination made and to obtain information as to what documentation will be required. When such documentation is obtained, it should be only shared with individuals in the Human Resources Office.
7. Workers' compensation illnesses and injuries, limited public health issues, and employment records held by the Library System in its role as employer are not subject to the full scope of the Privacy Rules.
8. All notices, procedures, practices, actions, records and/or forms required by the Privacy Rules will be developed, implemented and incorporated into a compliance/operating manual which will be updated as required.
9. The library commission, will designate a HIPPA Privacy Compliance Officer, (Benefits Manager)HIPAA Security Officer-Electronic Media (Deputy Executive Director for Information Technology), and HIPPA Security Officer – Physical Property (Director of Human Resources).

In any circumstance in which this policy and the Privacy Rules of the Health Insurance Portability and Accountability Act are in conflict, the Act pre-empt this policy.

**METROPOLITAN LIBRARY SYSTEM OF OKLAHOMA COUNTY EMPLOYEE BENEFIT PLAN,  
FLEXIBLE BENEFITS PLAN, MEDICAL EXPENSE REIMBURSEMENT PLAN AND  
EMPLOYEE ASSISTANCE PROGRAM ("PLANS")**

**NOTICE OF PRIVACY PRACTICES**

**THIS NOTICE DESCRIBES HOW MEDICAL INFORMATION ABOUT YOU MAY BE USED  
AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION.**

**PLEASE REVIEW IT CAREFULLY.**

The terms of this Notice of Privacy Practices apply to the Plans. You have received this Notice because you are a participant in one or more of the Plans. We are required to provide this Notice to you by the Health Insurance Portability and Accountability Act ("HIPAA"). HIPAA imposes requirements on employer health plans, including external Employee Assistance Programs ("EAP"), concerning the use and disclosure of protected health information.

This Notice describes how we protect the protected health information we have about you which relates to your coverage under the Plans, and how we may use and disclose this information. Protected health information includes individually identifiable information which relates to your past, present or future health, treatment or payment for health care services. This Notice also describes your rights with respect to protected health information and how you can exercise those rights.

**Permitted Uses of Medical Information.** The Plans are permitted to use and disclose your medical information **without** your authorization in the following situations:

- ✓ **To the individual.** The Plans can disclose health information to the individual who is the subject of the information.
- ✓ **For treatment purposes.** The Plans can disclose health information for the provision, coordination or management of health care and related services by one or more health care providers. For example, a Plan can disclose health information requested by a doctor in regard to your treatment.
- ✓ **For payment purposes.** The Plans can disclose health information to obtain premiums, determine or fulfill responsibilities for coverage and provision of benefits, and furnish or obtain reimbursement for health care delivered to an individual and activities of a health care provider to obtain payment or be reimbursed for the provision of health care. For example, a Plan can disclose health information if it is necessary in order to determine if the claim can be reimbursed under the terms of the Plan.
- ✓ **For health operations.** The Plans can disclose medical information if it is necessary to operate the business of the Plans. For example, quality assessment and improvement activities (such as case management and care coordination), competency assurance activities (such as provider or health plan performance evaluation, conducting or arranging medical reviews, audits, or legal services (such as fraud and abuse detection and compliance programs), specified insurance functions (such as underwriting, risk rating, and reinsuring risk), and business planning, management and administration of the Plans. We will also disclose medical information to business associates if they need to receive this information to provide a service to us and will agree to abide by specific HIPAA rules relating to the protection of such information.

- ✓ **Opportunity to Object.** The Plans can disclose medical information in a situation where you are given an opportunity to agree, acquiesce or object. If you are incapacitated, the Plan can disclose medical information in an emergency situation, or if, in the best judgment of the Privacy Compliance Officer, it is in your best interest to disclose medical information. It is sufficient if you give the Plan informal permission to disclose medical information.
- ✓ **Public Interest and Benefit Activities.** Subject to certain limitations, the Plans can disclose medical information if it is required by law, to a public health authority, to a governmental agency regarding victims of abuse, neglect, or domestic violence, to health oversight agencies, pursuant to a court order or subpoena, for certain law enforcement purposes, to funeral directors, coroners, or medical examiners to perform functions required by law, to facilitate organ donation, for certain research purposes, if necessary to prevent or lessen a serious and imminent threat to a person or the public, to a governmental agency if necessary for it to perform an essential governmental function, or as authorized by and to comply with any workers' compensation law.

HIPAA's Privacy Standards specify that state laws relating to the privacy of health information will continue to apply to the extent it is more stringent than the federal privacy standards. Oklahoma has various laws, some of which may apply to the Plans, that are more protective of your health information than the Privacy Standards. Oklahoma law contains strict limitations on the release of confidential information which may indicate the existence of communicable diseases. In particular, such information may only be released under the following circumstances: 1. Release made upon a court order; 2. Release made in writing by or with the written consent of the person whose information is being kept confidential or with the written consent of the legal guardian or legal custodian of such person, or if such person is a minor, with the written consent of the parent or legal guardian of such minor; 3. Release is necessary as determined by the State Department of Health to protect the health and well-being of the general public. Any such release by the Department or any review of such order shall be in accordance with the procedures specified by the Oklahoma Statutes; 4. Release is made of medical or epidemiological information to those persons who have had risk exposures as defined under Oklahoma law; 5. Release is made of medical or epidemiological information to health professionals, appropriate state agencies, or district courts to enforce the provision of Oklahoma law concerning the control and treatment of communicable or venereal diseases; 6. Release is made of specific medical or epidemiological information for statistical purposes in such a way that no person can be identified; and 7. Release is made of medical information among health care providers, their agents or employees within the continuum of care for the purpose of diagnosis and treatment of the person whose information is released. The Plan will comply with both federal and state requirements related to the protection of your right to privacy.

Other uses or disclosures of your medical information will be made only with your written authorization. If you give such an authorization, it can be revoked in writing at anytime. A revocation will not be effective to the extent that the Plan has taken action in reliance on the authorization.

#### **Your Rights With Respect to Health Information:**

- ✓ **Restrictions.** You have the right to request restrictions on uses and disclosures of health information to carry out treatment, payment or health care operations, except for uses or disclosures required by law. You must submit your request for restrictions on the use of your medical information in writing to the Privacy Compliance Officer. The Plans do not have to agree to the requested restrictions. If the Plans do not agree with your requested restrictions, the Plans will respond to you in writing as to why the restriction will not be honored. If the Plans agree to abide by the requested restriction, they can revoke their agreement, in writing, at any time. Termination of the restriction will apply with respect to

health information created or received after the Plans have informed you that it will no longer comply with the restriction.

If the Plans agree to a restriction, it may still disclose medical information if you are in need of emergency medical treatment and the restricted health information is needed to provide the necessary emergency treatment. The Plans shall request that the health care provider in receipt of such medical information not further use or disclose the information. The restriction is not effective if the Plans disclose medical information in a situation where you are given the opportunity to object and you do not object.

- ✓ **Right to receive confidential communications.** You have the right to request the Plans send all medical information to an alternative location. Your request must be in writing, state the location where health information communications should be sent, and state that disclosure of all or part of the information could endanger you.
- ✓ **Right to inspect and copy health information.** You have the right to inspect and copy your health information maintained by the Plans, except for psychotherapy notes, information compiled in reasonable anticipation of, or for use in, a civil, criminal or administrative action or proceeding, or protected health information maintained by the Plans that is subject to the Clinical Laboratory Improvements Amendment of 1988, 42 U.S.C. § 263(a) or exempt from such law under 42 CFR § 493.3(a)(2).

Your request to inspect and copy health information maintained by the Plans must be in writing and delivered to the Privacy Compliance Officer. The Plans may deny your request if the information is exempted under the previous paragraph or if a licensed health care professional determines, in the exercise of professional judgment, that the access requested is reasonably likely to endanger the life or physical safety of you or another person, the requested health information makes reference to another person (other than a health care provider) and a licensed health care professional determines, in the exercise of professional judgment, that the access is made by your personal representative and a licensed health care professional determines, in the exercise of professional judgment, that provision of access to such personal representative is reasonably likely to cause substantial harm to you or another person.

If access is denied, you have the right to have the decision reviewed by a licensed health care professional designated by the Plans to act as a reviewing official and who did not participate in the original decision to deny access.

The Plans will process requests, denial of requests, and review of request denials for health information in the manner required by 45 CFR § 164.524.

- ✓ **Right to amend health information.** You have the right to request that the Plans amend health information maintained by the Plans for as long as such information is maintained. Your request for amendment must be in writing to the Privacy Compliance Officer and provide a reason to support the requested amendment. The Plans may deny your request to amend the health information if it was not created by the Plans (unless you provide a reasonable basis to believe that the originator of the health information is no longer available to act on the requested amendment) or the Plans believe the health information is accurate and complete.

The Plans will process requests for amendment of health information in the manner required by 45 CFR § 164.526.

- ✓ **Right to receive an accounting of disclosures.** You have a right to receive an accounting of disclosures of health information by the Plans in the six (6) years prior to the

date on which the accounting is requested, except for disclosures made by the Plans to carry out treatment, payment and health care operations, disclosures made to you or your personal representative, for facility directories or to persons involved in your care or other notification purposes provided in 45 CFR § 164.510, for national security or intelligence purposes, to correctional institutions or law enforcement officials, or disclosures prior to the compliance date of the privacy regulations contained at 45 CFR §§ 164.501 *et seq.* Your request for an accounting of disclosures of health information by the Plans must be in writing to the Privacy Compliance Officer.

The Plans will process requests for an accounting of disclosures in the manner required by 45 CFR § 164.528.

- ✓ **Right to receive notices on paper.** If you have agreed to receive any notice electronically, you have the right to obtain a paper copy of the notice from the Plans upon request to the Privacy Compliance Officer.
- ✓ **Complaints.** You have the right to complain to the Plans or the Secretary of Health and Human Services if you believe your privacy rights have been violated. You may file a written complaint with the Privacy Compliance Officer. You will not be retaliated against for filing a complaint.

**Plans' Duties.** The Plans are required by law to maintain the privacy of protected health information and to provide you with notice of our legal duties and privacy practices with respect to your protected health information. This notice contains the privacy practices of the Plans. The Plans have incorporated the provisions of 45 CFR §§ 164.501 *et seq.* on all matters relating to the implementation of its privacy practices. The Plans shall abide by the terms of this notice. The Plans have the right to amend this notice and change its privacy practices and make such new privacy practices applicable to all protected health information the Plans maintain. Any such change will be reflected in a new notice distributed to each employee covered under the Plans by interoffice mail.

**Effective Date.** This notice is effective on and after July 1, 2003, as amended.

**Privacy Compliance Officer.** The Plans' Privacy Compliance Officer is Kelley E. Hoffman. Ms. Hoffman can be reached at **405.606.3743** or [khoffman@metrolibrary.org](mailto:khoffman@metrolibrary.org). The Privacy Compliance Officer should be contacted if you have any questions concerning the Plans' implementation of the privacy requirements.



# Authorization Form

Metropolitan Library System Health Plans  
300 Park Avenue  
Oklahoma City, OK 73102-3600  
Telephone: 405.606.3743 Fax: 405.606.3737

I hereby authorize you to use or disclose the specific information described below, only for the purposes and parties also described below.

Description of the specific information to be used or disclosed:

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Person or entity requesting the information and authorized to make the requested use or disclosure:

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Recipient of the information: \_\_\_\_\_

This information is being requested for the following purpose(s):

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This authorization shall remain in effect from the date signed below until \_\_\_\_\_  
(expiration date of event)

I understand that:

- I may inspect or copy the protected health information to be used or disclosed.
- I may revoke this authorization in writing by contacting your office at the address above, attention Privacy Officer.
- Information used or disclosed pursuant to the authorization may be subject to redisclosure by the recipient and no longer be protected by HIPAA.
- I may refuse to sign this authorization and that you may not retaliate nor discriminate against me because of my refusal to sign.

☐ If this box is checked, I understand that you will receive compensation from a third party for the use or disclosure of my information.

Covered Person: \_\_\_\_\_

Signature: \_\_\_\_\_

Relationship: \_\_\_\_\_

Date: \_\_\_\_\_

## History of Non-Routine Disclosures Request Form

Metropolitan Library System Health Plans  
300 Park Avenue  
Oklahoma City, OK 73102-3600  
Telephone: 405.606.3743 Fax: 405.606.3737

I hereby request that you provide me a full accounting, as provided under HIPAA, of all non-routine disclosures of my protected health information for the period described below. I understand that this will NOT include uses and disclosures as follows:

- Those conducted to carry out treatment, payment and health care operations
- Those provided to me
- Those provided for national security or intelligence purposes
- Those provided to correctional institutions or law enforcement officials
- Those that occurred prior to the compliance date for the covered entity.
- Those that I have previously authorized as evidenced by signing a valid authorization and which you have a copy on file.

### Reporting Period:

Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

### Estimated cost:

☐ First report in a 12-month period @ No Charge

\_\_\_\_\_ pages @ \$0.75 per page

Request Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Covered Person Name: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Requested By: \_\_\_\_\_ Relationship: \_\_\_\_\_

Signature: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

## Records Access Request Form

Metropolitan Library System Health Plans  
300 Park Avenue  
Oklahoma City, OK 73102-3600  
Telephone: 405.606.3743 Fax: 405.606.3737

I hereby request a copy of my medical record as detailed below:

- ☐ Full medical record held by this office
- ☐ Medical record for the period \_\_\_\_\_ through \_\_\_\_\_
- ☐ A specific portion/section of the record as follows:

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***I understand that, unless otherwise provided by law, the charge for this record will be \$0.25 per page for each page copied. I agree to pay this charge in full at the time I receive the copy of the record.***

Covered Person:		
Requested By:	Relationship:	
Signature:	Request Date:	
Address:		
City:	State:	ZIP:

## Release of Information Form

Metropolitan Library System Health Plans  
300 Park Avenue  
Oklahoma City, OK 73102-3600  
Telephone: 405.606.3743 Fax: 405.606.3737

Employee Name: \_\_\_\_\_

I hereby authorize the Metropolitan Library System of Oklahoma County, represented by the designated Recipient, to disclose the specific information described below, only to the parties also described below.

Recipient of the information: \_\_\_\_\_

Description of the specific information to be used or disclosed:

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This information may be disclosed to the following parties:

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This authorization shall remain in effect from the date signed below until the expiration date of this event.

I understand that I may revoke this authorization in writing at any time by contacting the Human Resources/Benefits Office. I further acknowledge that if I revoke my authorization, the Metropolitan Library System will no longer disclose health information about me for the reasons covered by this written authorization.

_____ Employee Name	-or-	_____ Personal Representative – Printed
_____ Signature		_____ Signature
_____ Date		_____ Date

## Request for Restriction of Records

Metropolitan Library System Health Plans  
300 Park Avenue  
Oklahoma City, OK 73102-3600  
Telephone: 405.606.3743 Fax: 405.606.3737

I hereby request to restrict the use and disclosure of some or all of my medical record as follows:

- ☐ Separate document attached.  
☐ As described below:

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I understand that the plan of which I am requesting this restriction is not obligated to allow it under the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and the regulations there under. I will be notified of their decision within sixty (60) days.

If this restriction is allowed, it will be maintained as part of my medical record for as long as this office holds the record, and this office may not use or disclose protected health information in violation of this restriction, except in emergency situations or to public health, government or law enforcement officials with the proper documentation.

I also understand that I have the right to cancel this restriction in writing or orally (as long as the oral agreement is documented) at any time and that this office may inform me that it is terminating its agreement to a restriction and then may freely use or disclose protected health information created or received after it has so informed me.

Covered Person:	
Name:	Relationship:
Signature:	Date:

I am exercising my right to cancel this restriction. I understand that by canceling this restriction this office may now freely use my protected health information for treatment, payment or health care operations.

Covered Person:	
Name:	Relationship:
Signature:	Date:

### OFFICE USE ONLY

Reviewed By:	Initials:	Date:
Decision: <input type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Response	Decision Notification Sent:	
Response approved by:		Date:

## Request to Amend Records

Metropolitan Library System Health Plans  
300 Park Avenue  
Oklahoma City, OK 73102-3600  
Telephone: 405.606.3743 Fax: 405.606.3737

I hereby request to amend my medical record as follows:

- ☐ Separate document attached.
- ☐ Add the notation below:

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Provide a specific reason for requesting the amendment described above:

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I understand that the office of which I am requesting this amendment must determine if the amendment is allowed, but, under certain conditions specified in the Healthcare Insurance Portability and Accountability Act of 1996 (HIPAA) and the regulations thereunder, is not obligated to allow it. I will be notified of their decision within sixty (60) days, as allowed by law.

If the amendment is allowed, it will be maintained as part of my medical record for as long as this office holds the record. I understand that the office may make a written response to my amendment, which will also become part of my medical record, and that I will be notified of any such response in writing within sixty (60) days of its being made.

Covered Person:		
Requested By:		Relationship:
Signature:		Request Date:
Address:		
City:	State:	ZIP:

OFFICE USE ONLY		
Reviewed By:	Initials:	Date:
Decision: <input type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Response	Decision Notification Sent:	
Response approved by:	Date:	

# **SH 600 Responsibilities of Employees**

## **SH 610 Facility Access**

*Revised: 10/94, 2/03, 1/06*

### **Policy**

To help protect library personnel and property, the Metropolitan Library System maintains the following procedures governing staff access to library facilities including the issuance of building keys/codes and security alarm codes.

### **Procedures**

#### **I. Keys**

- A. The Director of Facilities Maintenance is the control officer for the issuance, security and return of all system keys.
  - 1. The Director of Facilities Maintenance designates personnel authorized to have access to central key files and maintain checkout and check-in systems.
  - 2. Supervisors are to determine which staff members require keys, see to the issuance of them and retrieve keys from terminating employees.
- B. Personnel should receive only those keys necessary to fulfill their job duties.
- C. Keys issued to staff members are for their exclusive use and are not to be loaned.
- D. Unless requested or authorized by the Director of Facilities Maintenance, no staff member may duplicate, or cause to be duplicated, any key.
- E. Broken keys will be replaced, without charge to the employee, if the employee returns a portion of the broken key.
- F. A charge of \$1 per key will be billed to an employee who loses a key. This charge will not apply if the loss is due to theft or burglary and the theft or burglary is reported to the authorities and to the employee's supervisor.

#### **II. Liens Against Terminal Pay for Lost Keys**

When a library employee ends employment, (s)he will turn in all system keys to the issuing control officer. Charges for lost keys will be paid to the Business Office; failing that, the required amount will be withheld from the final paycheck. The final paycheck will not be released to the employee until all such charges are paid.

# **SH 600 Responsibilities of Employees**

## **SH 610 Facility Access**

*Revised: 10/94, 2/03, 1/06*

### **III. Door Lock Codes**

- A. Employees with knowledge of codes for push button door locks for either building or room access are expected to maintain the confidentiality of the codes.
- B. Care should be taken when entering codes to insure that non-employees are not in a position to observe number buttons as they are pushed.

### **IV. Security Alarm Systems - Codes**

- A. The Director of Facilities Maintenance is the control officer for the issuance of all security alarm codes.
  - 1. The Director of Facilities Maintenance, in conjunction with the administration and agency managers, designates personnel authorized to be issued the security alarm codes; the Director of Facilities Maintenance, or her/his designee, also briefs code holders on the step-by-step procedures for proper use of the codes.
  - 2. The Manager of Library Operations, or her/his designee, is responsible for locking the building and activating the security alarm system after all staff and maintenance personnel have left the building; the Manager of Library Operations, or her/his designee, is also responsible for unlocking the building and deactivating the security alarm system for normal operation.
- B. All personnel without the security alarm codes who require access to the building outside of normal operating hours for an emergency reason must obtain their supervisor's authorization. The decision of how to provide the employee access, if authorized, by either giving the employee the alarm code or by meeting the employee at the facility, is to be made by the supervisor.



# **SH 600 Responsibilities of Employees**

## **SH 620 Staff Use of Public Library Property and Services**

*Revised: 12/02*

### **Legal and Ethical Principles, General Statement**

Public employees have a special responsibility to avoid not only the wrongful act but also to avoid the appearance of wrongdoing. The misuse of public property for private gain is an obvious violation of the law; library employees formally charged with such a violation will be suspended without pay and, if convicted, will be discharged. Library employees observing a violation of the law are expected to report it immediately to a superior as a matter of professional ethics.

### **Policies**

1. While on duty, library employees will obey all laws including compliance with U.S. copyright act regarding books and materials, and microcomputer software.
2. While on duty, library employees may not use any library equipment, materials or services, including computer-based reference services, for their own personal benefit. Access to equipment and services is for library purposes.
3. Off-duty library employees (employees on rest break, lunch break or otherwise not on duty) may use library equipment, materials, or services normally available to the public according to normal policy and procedures for such uses; fees charged to the public for such use shall apply to library employees engaged in personal business.
4. Library employees must protect the essential confidential relationship, which exists between a library user and the library; no personal financial gain should result because of the library employee's role as a representative of the library in dealing with the library user.
5. Library employees may not remove or alter records obligating friends, family members, themselves or others for return of materials when materials have not been returned.
6. Library employees may not borrow materials if they have accounts beyond 60 days delinquent.
7. Library employees may not circumvent nor attempt to circumvent circulation policies by intentionally issuing fraudulent or duplicate borrowers cards.
8. Library employees may not remove materials from the library premises without following normal borrowing procedures.
9. Library employees may not store personal files, electronic or hard copy, on library premises.

# **SH 600 Responsibilities of Employees**

## **SH 620 Staff Use of Public Library Property and Services**

*Revised: 12/02*

10. Library employees may not install on library computer equipment, computer software (including application software), screen savers, wallpaper, games, etc. that have not been authorized by library automation staff through established procedures.

Equipment and services include but are not limited to the following:

- Library materials including, but not limited to, books, videos, audio tapes, CDs, magazines, newspapers;
- Personal computers and software;
- All databases available to the public including library catalog or materials;
- Internet access;
- Library maintained Email accounts;
- Business equipment such as photocopier, FAX machines, telephones, typewriters;
- Library vehicles;
- Maintenance tools and equipment;
- Library furniture;
- Consumable office supplies such as paper, pens, pencils, binders/folders, notebooks;

Exceptions:

Library staff will be afforded the privilege of a reduced fee for photocopies not less than the cost to the library for the copies.

# **SH 620 Staff Use of Library Property and Services**

## **SH 620.1 Guidelines for Employee's Personal Belongings in the Workplace**

*Adopted: 6/98*

### **Purpose**

The Library System provides staff with equipment necessary to perform their job duties. Employees should follow the guidelines listed below when determining whether or not to bring personal belongings to the workplace. The Library System maintains sufficient insurance coverage for all library buildings and building contents, including employee's personal belongings. However, it is not intended that the insurance policy paid for by public funds should cover the loss of employee's valuable personal belongings not deemed necessary for the performance of the employee's job duties.

### **Guidelines**

1. The Library's insurance policy does not cover the damage or loss of an employee's personal belongings unless the loss is caused by negligence of the library system.
2. Supervisor's approval must be obtained before an employee may bring personal furniture or equipment to be used in the workplace.
3. Employees should not, under any circumstances, bring valuable personal items to the workplace. If it is necessary, then those items should be kept with the employee at all times and not be left unattended.
4. Employees are responsible for the damage or loss of personal belongings in the workplace.

# **SH 600 Responsibilities of Employees**

## **SH 630 Alcohol and Drug Use Policy**

*Adopted: 4/89, 2/03*

### **Purpose**

The Metropolitan Library System recognizes that the state of an employee's health affects his/her job performance, the kind of work he/she can perform and may affect his/her opportunities for continued employment. It is the intent of this policy to provide employees with the library system's viewpoint on these behavioral/medical disorders, to encourage a positive viewpoint toward correcting these disorders, and to provide guidelines for consistent application throughout the system regarding alcohol and drug usage situations.

### **Policy**

The library system intends to give the same consideration to persons with chemical (alcohol and other drugs) dependencies as it does to employees having other diseases. The library system is concerned only with those situations where use of alcohol and other drugs interferes with any employee's health and job performance, adversely affects the job performance of other employees, adversely affects the safety of other employees or the public, or is considered so serious as to be detrimental to the library's efficient operation. There is no intent to intrude upon the private lives of employees.

Early recognition and treatment of chemical dependency problems is important for successful rehabilitation, efficient operation of the library system and reduced personal, family and social disruption. The library system supports sound treatment efforts and an employee's job will not be jeopardized for conscientiously seeking assistance.

Constructive disciplinary measures may be applied to provide motivation to seek assistance. Normal library system benefits, such as leave provisions and group health plans, are available to give help in the rehabilitation process.

### **Legal Substances**

The use of any legally obtained drug, on library system premises, to the point where such use adversely affects the employee's job performance, is prohibited. This prohibition covers arriving on the library system's premises under the effect of any drug which adversely affects the employee's job performance, including the use of prescribed drugs under medical direction. Where physician-directed use of drugs adversely affects job performance, it is in the best general interest of the employee, co-workers and the library system that sick leave be used.

# **SH 600 Responsibilities of Employees**

## **SH 630 Alcohol and Drug Use Policy**

*Adopted: 4/89, 2/03*

### **Illegal Drugs**

Illegal drugs, for the purpose of this policy, include (a) drugs, which are not legally obtainable, and (b) drugs, which are legally obtainable but have been obtained illegally.

The unlawful manufacture, distribution, dispensing, possession or use of an illegal drug by employees on library system premises or while on library system business is prohibited. Arriving on library system premises under the influence of any drug to the extent that job performance is adversely affected is prohibited. This prohibition applies to any and all forms of narcotics, depressants, stimulants, hallucinogens or other chemicals whose sale, purchase, transfer, use or possession are prohibited or restricted by law.

# **SH 630 Alcohol and Drug Use Policy**

## **SH 630.1 Administrative Procedures for Alcohol and Drug Use Policy**

*Adopted: 4/89, Revised: 2/03*

These procedures implement the Policy of the Metropolitan Library Commission providing guidelines for consistent handling of alcohol and drug usage situations.

### **Procedure**

#### **1. Alcohol and Drug Use and Job Performance**

A supervisor who detects deteriorating job performance is expected to document it regardless of the cause of the deterioration and to discuss job performance with the employee.

- A. At no time will the supervisor accuse the employee of drug or alcohol abuse but will insist that job performance be brought to a satisfactory level and maintained.
- B. If the employee voluntarily admits that drug or alcohol use is causing the poor performance, the supervisor will advise the employee to use one or more of the various benefits or leave programs available to eligible employees for treatment and the availability of the Employee Assistance Program.
- C. As in other cases involving poor performance, the supervisor will inform the employee that failure to bring performance up to satisfactory standards within a reasonable stated time will lead to disciplinary action.

#### **2. Legal Drugs**

- A. If physician-directed use of drugs adversely affects the ability of an employee to perform job duties in a safe and/or effective manner, the supervisor should direct the employee to take sick leave and remain off or leave work until his/her ability to perform has reached an acceptable standard.
- B. If the odor of alcohol is present on an employee to the extent that it could be considered offensive, regardless of the employee's ability to perform job duties in a safe and/or effective manner, the supervisor should relieve the employee of duties. The supervisor should direct the employee to take annual leave or leave without pay and remain off work until his/her presence is not objectionable. Repeated similar behavior may result in further disciplinary action.

# **SH 630 Alcohol and Drug Use Policy**

## **SH 630.1 Administrative Procedures for Alcohol and Drug Use Policy**

*Adopted: 4/89, Revised: 2/03*

### **3. Illegal Drugs**

If an employee is observed by a supervisor on library system premises or while elsewhere on library system business participating in the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance, the supervisor should immediately report the circumstances to his/her director level administrator.

Any employee found to be engaged on library system premises or elsewhere while on library system business in illegal drug activities is subject to disciplinary action, up to and including termination. Any such disciplinary action will be in accordance with the Due Process Policy and Grievance Policy.

# **AL 300 Responsibilities of Customers**

## **AL 340 Smoking Restrictions**

*Adopted: 8/91, Revised: 1/92, 5/04*

### **Policy Statement**

In our commitment to a healthful, comfortable and productive environment for employees and the general public, the Library System follows Oklahoma Statutes concerning restrictions on smoking.

### **Regulations**

- 1) Smoking is strictly prohibited within, or on, Library System owned, leased or operated buildings, facilities and vehicles. Additionally, no smoking is permitted within 25 feet of the entrances or exits. This includes but is not limited to:

A) all public service areas	E) offices, workrooms, shop areas,
B) meeting rooms	rooftops
C) restrooms	F) meal and break rooms
D) lobbies, foyers, elevators, hallways	G) vehicles
- 2) "No Smoking" signs must be posted at all building entrances, throughout each building, and in Library-owned vehicles.
- 3) Employees are responsible for informing Library customers of this policy.
- 4) The Library System will inform employees and employment applicants of smoking restrictions.
- 5) Penalties for employee violations will include the following:
  - A) First offense: a verbal warning from his/her supervisor.
  - B) Second offense: a written warning from his/her supervisor.
  - C) Third offense: further disciplinary action, possible employee dismissal.
- 6) Penalties for Library customer violations will include the following:
  - A) First offense: a verbal warning from Library management.
  - B) Second offense: customer will be asked to leave the building.
  - C) Third offense: the Executive Director may suspend the customer's library privileges based on the documented violations.



# PUBLIC EMPLOYEE JOB SAFETY & HEALTH PROTECTION

The Oklahoma Occupational Health & Safety Standards Act of 1970 provides job safety and health protection for public workers by promoting safe and healthful working conditions. As authorized by the Act, rules have been adopted to prevent accidents in all public work places, including public schools and all political subdivisions of city, county and state government. These rules include standards contained in the Federal Occupational Safety & Health Act of 1970 (OSHA) and other safety and health standards derived from national consensus standards.

## EMPLOYERS

Each public employer shall establish and maintain safe and healthful workplace conditions. Appropriate safety devices shall be used where necessary to protect the life, health and safety of all public employees. No employer shall interfere with the use of any method or process adopted for the protection of an employee or any other person lawfully within such place of employment. No employer shall fail to obey orders necessary to protect the life, safety and health of public employees. Public employers must allow their employees to participate in mandatory training and education programs.

No public employee shall willfully remove, displace, damage, destroy, carry off or in any way interfere with the use of any safety device or safeguard furnished or provided for use in any place of public employment. No employee or agent of employees shall interfere with any method or process adopted for the protection of any employee or of any other person lawfully within such place of employment. No employee shall fail to obey orders necessary to protect the life, safety and health of public employees. Public employees must participate in mandatory training and education programs.

Without prior notification, authorized inspectors from the Oklahoma Department of Labor may, at any reasonable time, enter and inspect public places of employment in order to investigate matters deemed appropriate, and to determine if any person is violating any provision of the Act or any standards promulgated pursuant to it.

Public employees have the right to file a complaint requesting an investigation of unsafe or unhealthful conditions. No adverse personnel action may be taken against any employee who files a workplace safety or health complaint. Employees who believe they have been discriminated against on this basis may file a complaint with the Oklahoma Department of Labor.

If upon inspection the Oklahoma Department of Labor believes a public employer has violated the Act, a notice alleging such violation(s) will be issued to the employer. The notice will specify the time frame in which each violation must be corrected or a response provided. The Commissioner of Labor may require the violation(s) be corrected immediately and/or the alleged violator appear before the Commissioner or a designated representative at a specified time and place to answer the charges.

This poster version is for the purpose of the Oklahoma Department of Labor website. www.labor.ok.gov. Copies have been deposited with the Publications Clearinghouse of the Oklahoma Department of Labor. Revised 2005/12-04.

## PROPOSED PENALTIES

The Attorney General, upon request of the Commissioner of Labor, shall bring an action against any person who violates any of the provisions of the Act or violates any order or determination of the Commissioner promulgated pursuant to the Act.

Any public employer or political subdivision failing to comply with any standards or interfering with, impeding or in any manner obstructing the administration of standards pursuant to the provisions of the Act may be charged with a misdemeanor. Additionally, such employers or political subdivisions may be prevented, by cease and desist orders, from continuing such violation(s). Each day in which each violation occurs shall constitute a separate violation.

Safety and health education and training is the best way to help prevent and control occupational accidents. The Department of Labor provides public employers with free consultation services. The Department recognizes the outstanding efforts of participating employers.

Public employers must maintain accurate work-related injury, exposure and illness incident records. Employers are to use the OK-200 recordkeeping system or its substantial equivalent. Calendar year totals (excluding names of employees) must be posted no later than February 1<sup>st</sup> of the year following the calendar year to which the report applies. This information must remain posted for the entire month of February. Public employers are required to maintain written safety and health programs.

This poster must be displayed in one or more conspicuous places where notices to employees are customarily posted. For assistance or additional information, contact:

**Oklahoma Department of Labor**  
***Public Employee Occupational Safety & Health***

*Oklahoma City*  
4001 North Lincoln Boulevard  
Oklahoma City, OK 73105-5212  
405-528-1500, Ext. 254  
888-269-5353, Ext. 254

*Tulsa*  
440 South Houston, Suite 300  
Tulsa, OK 74127-8920  
918-581-2400, Ext. 111

*Brenda Reneau*  
**Brenda Reneau**  
***Commissioner of Labor***



# SH 640 Safety

*Adopted 5/04, Revised 5/07*

## Policy

The Metropolitan Library System (MLS) requires all employees and volunteers to follow safe working procedures. MLS has developed comprehensive health and safety programs. These programs comply with all federal, state and municipal laws, codes, regulations and standards relating to health, safety and the environment. These programs are assembled in the MLS Safety Manual maintained at each MLS location.

Safety standards applicable to the Library System are those prescribed by the Oklahoma Department of Labor, Public Employees Occupation Safety and Health (PEOSH) Division. Generally, these standards are the same as those issued by the Federal Occupational Safety and Health Administration (OSHA).

## Regulations

Every employee or other person authorized to conduct MLS activities is responsible for complying with all applicable health and safety regulations, MLS policies and established work practices. This includes but is not limited to:

1. Responsible and careful performance of his/her job duties in such a manner as to ensure safety.
2. Abide by restrictions or limitations prescribed or recommended by the employee's doctor when performing physical activities.
3. Promptly report any accidents, injuries or unsafe working conditions to his/her immediate supervisor. These include malfunctioning equipment and work-related fires, accidents, incidents, injuries, illnesses and property damage.
4. Supervisors will report accidents within 48 hours of occurrence using appropriate reporting procedures as described in SH 540 and AS 700.1. See Policy & Procedure Manual for more details. If the accident is life threatening or results in a fatality, report immediately to Director of Human Resources and Executive Director
5. Read and comply with all safety procedures.
6. Attend established education and training sessions and comply with health and safety directions as described in the MLS Safety Manual
7. Use proper Personal Protective Equipment (PPE) as described in the MLS Safety Manual
8. Wear clothing that is in good repair and meets the requirements of the assigned work.

## SH 640 Safety

*Adopted 5/04, Revised 5/07*

9. Ensure only PEOSH or OSHA approved equipment (including ladders and stools) is used at all times and are properly secured before using.
10. Know emergency plans and procedures for his/her work area.
11. Participate in required inspection and monitoring programs.
12. Consult Material Safety Data Sheets (MSDS) for chemicals used.
13. Use established safe-lifting techniques when moving heavy objects.
14. Maintain a clean and orderly work area.
15. Keep floors and walkways free of obstructions such as extension cords, open file drawers or loose supplies.
16. Immediately remove spilled water or other liquids from floors and walkways.
17. Operate Library-owned vehicles in compliance with state and local laws.
18. Keep equipment in good repair.
19. Operate equipment only after receiving the proper training and use equipment only for the purpose for which it is designed.

## MLS Safety Committee

The MLS Safety Committee has been established to promote the welfare and safety of library system employees. The Safety Committee is charged with the following duties and responsibilities:

1. Recommend and support safety education and programs for library employees
2. Formulate, review and/or recommend the adoption of safety policies
3. Ensure system-wide compliance with all PEOSH and OSHA standards
4. Monitor performance of all department safety inspections
5. Review accident reports and resolve any unsafe practices and conditions
6. Review and approve all chemicals and equipment used to ensure safe practices

## SH 640 Safety

*Adopted 5/04, Revised 5/07*

The Safety Committee members are appointed by and are responsible to the Executive Director. The committee is composed of Deputy Executive Director/Library Operations, Director of Facilities Maintenance, Director of Human Resources, Headquarters Manager and three additional members chosen from the X-Change Committee.

### **Safety Training Regulations**

1. All employees will be provided with safety instruction including safe lifting, repetitive motion techniques, exercises for reduction of repetitive motion injuries, and the use of personal protection equipment. Training, as described in the MLS Safety Manual, will be required for all new hires and upon adding or changing job duties.
2. All new employees, both full and part time, will complete one hour of safety training during the first quarter of employment. \*When an employee's first day on the job is the last day of the quarter (March 31, June 30, September 30 or December 31), s/he must complete the one hour of safety training that day.
3. Employees will complete 30 minutes of safety training each calendar quarter.
4. Employees with one worker's compensation reportable injury or illness during the previous calendar quarter will complete one hour of safety training.
5. Employees with more than one worker's compensation reportable injury or illness during the previous quarter will complete two hours of safety training.
6. Upon return to work following a worker's compensation related injury, employees will complete safety training on the first day back. If this is not possible, safety training must (without exception) be completed within the first five workdays. This training will be specific as to the injury or illness suffered by the employee. If no related materials are available, the general safety topic materials may be used. If the employee has not already completed his/her regularly scheduled training, this training will count towards the requirement.
7. An employee who fails to meet the required quarterly safety training will receive no higher than a two for the Training and Development standard on his/her next appraisal.

# SH 600 Responsibilities of Employees

## SH 650 Employee Dress Code

*Revised: 9/01, 11/06*

### Policy

Metropolitan Library System's objective in establishing a dress code is to enable employees to project a professional, business-like image while expressing a non-intimidating, approachable and comfortable image to our customers. Business casual dress is the standard for this dress code.

Staff members must dress appropriately for the community served, whether interior or exterior customers, and the job being performed, keeping in mind that the idea of fostering a positive professional image of the library system is important to public acceptance and support. Supervisors will discuss inappropriate business casual dress with individual staff members and determine what is inappropriate for each library, department, or office.

**Note:** *The MLS will make a reasonable effort to accommodate employees' religious beliefs and ADA qualified disabilities.*

### Guidelines

Because not all casual clothing is suitable for the office, these guidelines will help you determine what is appropriate to wear to work. Clothing that works well for the beach, yard work, dance clubs, exercise sessions, and sports contests is not appropriate for a professional appearance at work.

Clothing that reveals too much cleavage, your stomach or your underwear is not appropriate for a place of business, even in a business casual setting.

Staff will wear clean, pressed and well-maintained attire appropriate to the type of work they do. Unwashed, ripped or cut-off clothing is not appropriate for wear to work in any library, department, or office. Shoes are required and must also be well-maintained. Good grooming and personal hygiene is required.

Torn, dirty, or frayed clothing is unacceptable. All seams must be finished.

Shirts with logos (no t-shirts) are acceptable as long as the intent of the logo is not offensive to your community served and fosters a positive, professional image.

On Fridays and Saturdays, jeans, an appropriate top and shoes, as defined on page 2, can be worn.

# SH 600 Responsibilities of Employees

## SH 650 Employee Dress Code

*Revised: 9/01, 11/06*

Below is a general overview of acceptable business casual attire. Items that are not appropriate for the office are listed, too. Neither list is all-inclusive and both are open to change. The lists tell you what is generally acceptable as business casual attire and what is generally not acceptable as business casual attire.

No dress code can cover all contingencies so employees must exert a certain amount of judgment in their choice of clothing to wear to work.

If questions arise as to what does or does not constitute an appropriate appearance for a particular library, department or office, the immediate Supervisor will be the judge. Staff may wear clothes listed as “inappropriate” under such circumstances determined by the supervisor as special workdays, for special projects/events, and inclement weather days. Staff is responsible for clearing in advance “inappropriate” work attire with supervisor.

### **Enforcement**

Employees deemed by supervisors to be dressed inappropriately or displaying improper personal hygiene may be sent home on their own time to change. Inappropriate dress will be taken into consideration in performance appraisals. Employee standards apply if safety is an issue.

### ***Defined***

- **Slacks, Pants, and Suit Pants**  
Slacks that are similar to Dockers™ and other nice looking dress pants are acceptable. Dressy pants that fall between the mid-calf and ankle are generally acceptable.  
*Inappropriate slacks or pants include jeans (except Pages and certain preapproved departments, as well as for staff working on Casual Fridays and Saturdays), capri's (pants that fall above mid-calf) camouflage or cargo pants, sweatpants, exercise pants, shorts, Bermuda shorts, denim overalls, leggings (when worn without appropriate skirt, dress or pants), and any spandex or other form-fitting pants such as bike clothing*
- **Skirts, Dresses, and Skirted Suits**  
Dress and skirt length should be no shorter than 2/3's of the upper thigh. Culottes or split skirts may be worn as long as they are full enough to look like skirts  
*Inappropriate attire includes: Skorts, strapless, beach or spaghetti-strap dresses, and short, tight skirts that ride halfway up the thigh.*

# SH 600 Responsibilities of Employees

## SH 650 Employee Dress Code

*Revised: 9/01, 11/06*

- **Shirts, Blouses, and Jackets**

Casual shirts, golf shirts, dress shirts, sweaters, and turtlenecks are acceptable. Most suit jackets or sport jackets are also acceptable attire for the office, if they violate none of the listed guidelines.

*Inappropriate attire includes tank tops(tank tops may be worn if accompanied by a jacket or shirt); sweatshirts; midriff tops, shirts with potentially offensive words, terms, logos, pictures, cartoons, or slogans; halter-tops; casual tee-shirts (Hanes™, athletic, etc.) and sweat shirts (except for Pages not working service desks, and for MLS and MLS Friends related shirts on Casual Fridays & Saturdays)*

- **Shoes and Footwear**

Most shoes designed for outdoor wear are generally acceptable. Staff who work with lifting, shelving, carrying or pushing book trucks must not wear shoes that are unsafe for work conditions (see MLS Safety Rules; closed toe and closed heel shoes).

*Inappropriate attire includes: casual rubber garden or beach flip-flops, slippers or house shoes).*

- **Jewelry, Makeup, Perfume, Body Art and Cologne**

When worn or displayed, must be used in moderation.

- **Hats**

Hats are not appropriate inside the workplace; however, hats may be worn if staff will be working outdoors.

This code does not apply to uniformed employees.

**METROPOLITAN LIBRARY SYSTEM**  
**IDENTIFICATION CARD POLICY**  
**FOR EMPLOYEES AND VOLUNTEERS**

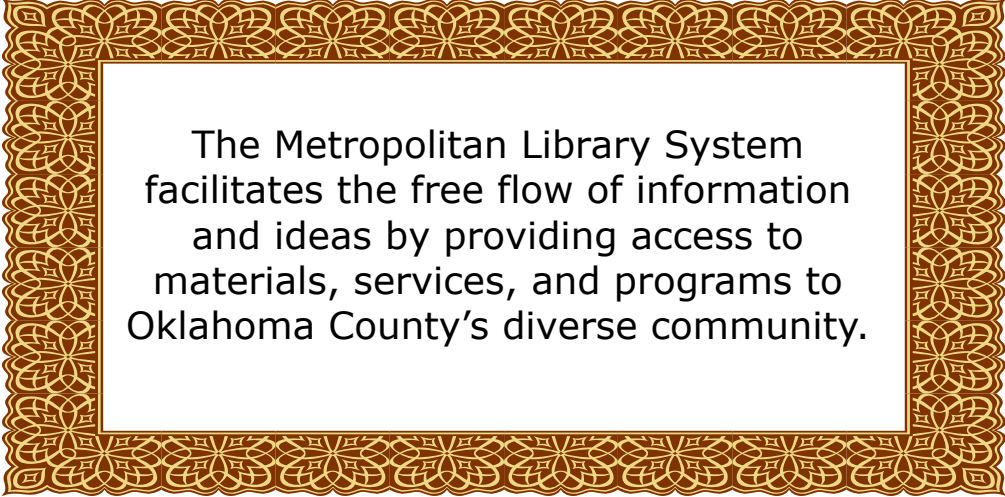
**ADMINISTRATIVE POLICY**

1. The wearing of identification cards in a manner visible to other employees, volunteers and customers is mandatory.
2. Supervisors should arrange for all new employees to visit the Human Resources Office within the first five working days to have identification cards made.
3. All employees will be issued two identification cards. The second card is issued in case an employee forgets and leaves his/her identification card at home (or elsewhere) so that the second card will be available at work to be worn.
4. If an employee reports to work without an identification card (both having been left elsewhere or lost), the employee will be allowed to use a temporary card available from his/her supervisor for a period of no more than three days with additional time at the discretion of the supervisor. During that period of time, the employee will be expected to either find his/her card or pay for and obtain a replacement.
5. Extra or replacement cards can be obtained for \$1.00 each upon providing the Human Resources Office with the receipt issued by the Business Office.
6. The cards remain the property of the library system and must be returned to the employee's supervisor or to the Human Resources Office when he/she leaves the employ of the library system.

**Approved:** 05/15/02



### Mission Statement (VF 110)



The Metropolitan Library System facilitates the free flow of information and ideas by providing access to materials, services, and programs to Oklahoma County's diverse community.

### Our Vision for the Future



The Metropolitan Library System envisions a future in which all the people of Oklahoma County have equitable access to an information-rich environment of library resources

The Metropolitan Library System is Oklahoma County's premier information, education, and entertainment resource.



# Organizational Values & Commitments

## Integrity

- Maintaining the highest ethical standards - we strive to avoid wrongdoing; even the appearance of wrongdoing;
- Exhibiting exceptional employee conduct; adhering to the laws and standards governing the conduct of the people in this organization;
- Upholding promises and fulfilling expectations as a part of our daily habit;
- Acting as responsible stewards of public monies - planning, spending, and maintaining financial records in the public interest; never based on personal interest and/or personal gain.

## Excellence

- Offering library materials and/or services to all stakeholders through high-quality customer service interactions;
- Valuing quality above quantity - Never sacrificing core services to provide secondary services or attempting to be everything to everyone;
- Believing it is a honor to serve the public and a privilege to help using our expertise to make all stakeholders feel welcome;
- Meeting and exceeding stakeholders' needs, desires, and expectations within the scope of library material and/or services;
- Working cooperatively as a team to achieve or surpass the organizational goals by placing the attainment of these goals in high priority.

## Democratic Process

- Respecting the rights of all individuals to receive information and share ideas. We believe the free communication process is essential to the preservation of a creative culture and the preservation of a free society;
- Serving as a neutral information provider and failing to show favoritism or endorsement to any particular stakeholder's political or moral views;
- Maintaining a broad collection of materials, and the pursuit of partnerships with other information providers, to allow all stakeholders to choose freely from a variety of offerings;
- Providing access to a variety of services (i.e. borrowing privileges, staff assistance, information and reference inquiries, and partnerships with other information providers) to assist stakeholders in meeting their needs and desired information.

## Stakeholders

- Building and sustaining stakeholder loyalty, respect and trust;

- Providing consistently high-quality library interactions and services resulting in delighted stakeholders and creating raving fans;
- Assisting in personal and/or professional growth and development by providing access to information, materials, programs, training, and mentoring in an environment conducive to such growth and development;
- Developing partnerships with, and for, the community; aimed at advancing both the stakeholder's and the library's mission and goals.

# **VF 100 Statements on Basic Values**

## **VF 120 The Freedom to Read Statement**

*Adopted: 8/73*

### **The Freedom to Read**

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

We are deeply concerned about these attempts at suppression. Most such attempts rest on a denial of the fundamental premise of democracy: that the ordinary citizen, by exercising his critical judgment, will accept the good and the bad. The censors, public and private, assume that they should determine what is good and what is bad for their fellow-citizens.

We trust Americans to recognize propaganda, and to reject it. We do not believe they need the help of censors to assist them in this task. We do not believe they are prepared to sacrifice their heritage of a free press in order to be "protected" against what others think may be bad for them. We believe they still favor free enterprise in ideas and expression.

We are aware, of course, that books are not alone in being subjected to efforts at suppression. We are aware that these efforts are related to a larger pattern of pressures being brought against education, the press, films, radio and television. The problem is not only one of actual censorship. The shadow of fear cast by these pressures leads, we suspect, to an even larger voluntary curtailment of expression by those who seek to avoid controversy.

Such pressure toward conformity is perhaps natural to a time of uneasy change and pervading fear. Especially when so many of our apprehensions are directed against an ideology, the expression of a dissident idea becomes a thing feared in itself, and we tend to move against it as against a hostile deed, with suppression.

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

# **VF 100 Statements on Basic Values**

## **VF 120 The Freedom to Read Statement**

*Adopted: 8/73*

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

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

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

We therefore affirm these propositions:

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

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

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

Publishers and librarians serve the educational process by helping to make available knowledge and ideas required for the growth of the mind and the increase of learning.

# **VF 100 Statements on Basic Values**

## **VF 120 The Freedom to Read Statement**

*Adopted: 8/73*

They do not foster education by imposing as mentors the patterns of their own thought. The people should have the freedom to read and consider a broader range of ideas than those that may be held by any single librarian or publisher or government or church. It is wrong that what one man can read should be confined to what another thinks proper.

3. It is contrary to the public interest for publishers or librarians to determine the acceptability of a book on the basis of the personal history or political affiliations of the author.

A book should be judged as a book. No art or literature can flourish if it is to be measured by the political views or private lives of its creators. No society of free men can flourish which draws up lists of writers to whom it will not listen, whatever they may have to say.

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

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

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

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

6. It is the responsibility of publishers and librarians, as guardians of the people's freedom to read, to contest encroachments upon that freedom by individuals or groups seeking to impose their own standards or tastes upon the community at large.

It is inevitable in the give and take of the democratic process that the political, the moral, or the aesthetic concepts of an individual or group will occasionally collide with those of another individual or group. In a free society each individual is free to

# **VF 100 Statements on Basic Values**

## **VF 120 The Freedom to Read Statement**

*Adopted: 8/73*

determine for himself what he wishes to read, and each group is free to determine what it will recommend to its freely associated members. But no group has the right to take the law into its own hands, and to impose its own concept of politics or morality upon other members of a democratic society. Freedom is no freedom if it is accorded only to the accepted and the inoffensive.

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

The Freedom to Read is of little consequence when expended on the trivial; it is frustrated when the reader cannot obtain matter fit for his purpose. What is needed is not only the absence of restraint, but the positive provision of opportunity for the people to read the best that has been thought and said. Books are the major channel by which the intellectual inheritance is handed down, and the principal means of its testing and growth. The defense of their freedom and integrity, and the enlargement of their service to society, requires of all bookmen the utmost of their faculties, and deserves of all citizens the fullest of their support.

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

# **VF 100 Statements on Basic Values**

## **VF 130 Freedom to View**

The Freedom to View, along with the freedom to speak, to hear, and to read, is protected by the First Amendment to the Constitution of the United States. In a free society, there is no place for censorship of any medium of expression. Therefore these principles are affirmed.

1. To provide the broadest possible access to film, video, and other audio-visual materials because they are a means for the communication of ideas. Liberty of circulation is essential to insure the constitutional guarantee of freedom of expression.
2. To protect the confidentiality of all individuals and institutions using film, video, and other audiovisual materials.
3. To provide film, video, and other audiovisual materials which represent a diversity of views and expression. Selection of a work does not constitute or imply agreement with or approval of the content.
4. To provide a diversity of viewpoints without the constraint of labeling or prejudging film, video and other audiovisual materials on the basis of the moral, religious, or political beliefs of the producer or filmmaker or on the basis of controversial content.
5. To contest vigorously, by all lawful means, every encroachment upon the public's freedom to view.



# **VF 100 Statements on Basic Values**

## **VF 140 Statement on Professional Ethics**

*Adopted: 1981*

### **Introduction**

Since 1939, the American Library Association has recognized the importance of codifying and making known to the public and the profession the principles, which guide librarians in action. This latest revision of the Code of Ethics reflects changes in the nature of the profession and in its social and institutional environment. It should be revised and augmented as necessary.

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

Librarians are dependent upon one another for the bibliographical resources that enable us to provide information services, and have obligations or maintaining the highest level of personal integrity and competence.

### **Code of Ethics**

- I. Librarians must provide the highest level of service through appropriate and usefully organized collections, fair and equitable circulation and service policies, and skillful, accurate, unbiased, and courteous responses to all requests for assistance.
- II. Librarians must resist all efforts by groups or individuals to censor library materials.
- III. Librarians must protect each user's right to privacy with respect to information sought or received, and materials consulted, borrowed, or acquired.
- IV. Librarians must adhere to the principles of due process and equality of opportunity in peer relationships and personnel actions.
- V. Librarians must distinguish clearly in their actions and statements between their personal philosophies and attitudes and those of an institution or professional body.
- VI. Librarians must avoid situations in which personal interests might be served or financial benefits gained at the expense of library users, colleagues, or the employing institution.

# **VF 210 Statements Regarding Access to Libraries**

## **VF 210.1 Procedures Affecting Access to Library Materials and Services**

*Adopted: 1/82*

### **An Interpretation of ALA's Library Bill of Rights**

The right of free access to information for all individuals is basic to all aspects of library service regardless of type of library. Article 5 of the Library Bill of Rights protects the rights of an individual to use a library regardless of origin, age, background, or views. The central thrust of the Library Bill of Rights is to protect and encourage the free flow of information and ideas. The American Library Association urges that all libraries set policies and procedures that reflect the basic tenets of the Library Bill of Rights.

Many libraries have adopted administrative policies and procedures regulating access to resources, services, and facilities, i.e., specific collections, reference services, interlibrary loan, programming, meeting rooms, exhibit space. Such policies and procedures governing the order and protection of library materials and facilities, and the planning of library programs and exhibits, or for discriminating against specific groups of library patrons. Such abuse of administrative procedures and policies is in opposition to the Library Bill of Rights.

The American Library Association recommends that all libraries with rare or special collections formulate policies and procedures for the nature of the patron interest in the materials. Restricted access to such collections is solely for the protection of the materials, and must in no way limit access to the information and ideas contained in the materials.

The Model Interlibrary Loan Code of the American Library Association recommends that all library patrons be eligible for interlibrary loan, in accordance with Article 5 of the Library Bill of Rights and the statement Free Access to Libraries for Minors. The Model Interlibrary Loan Code states the importance of considering the needs and interests of all users, including children and young adults. Borrowing libraries should provide the resources to meet the ordinary needs of all of its primary clientele, and any members of its clientele should be eligible for interlibrary loan. When libraries adhere to the Model Interlibrary Loan Code, access to information is protected.

Library administrative policies should examine all restriction to resources or services associated with age, as all are violations of Article 5 of the Library Bill of Rights and the statement on restricted access to library materials. For example, privileges associated with library cards should be consistent for all library users, no matter what the age. Library policies in which certain patrons, usually minors are denied library privileges available to other library patrons are not endorsed by the American Library Association, as they violate Article 5 of the Library Bill of Rights, as well as the statement on Free Access to Libraries for Minors. It is parents and only parents who may restrict their children--and only their children--from access to library materials and services. Reference service policies and procedures, such as library policies limiting the time spent on answering

# **VF 210 Statements Regarding Access to Libraries**

## **VF 210.1 Procedures Affecting Access to Library Materials and Services**

*Adopted: 1/82*

telephone reference questions, should provide for equitable basis, regardless of age or type of question. These policies must apply to both adult and child patrons. Policies governing the use of meeting rooms and exhibits should be examined to ensure that minors are not excluded from a program of interest to them based on age. Meeting rooms and exhibit spaces should also be available on an "equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use," and should not be denied to anyone based solely on age.

Policies should reflect that a person's right to attend a library-initiated program "should not be denied or abridged because of origin, age, background, or views," as stated in Library Initiated Programs as a Resource, an interpretation of the Library Bill of Rights.

(8389-6529-6)

# **VF 210 Statements Regarding Access to Libraries**

## **VF 211 Citizen's Bill of Library Rights**

*Adopted: 12/69, Revised: 3/80, 4/97*

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

1. Our books and other library resources should be provided for the interest, information, and enlightenment of all people and municipalities in Oklahoma County. Materials should not be excluded because of the origin, background, or views of those contributing to their creation.
2. Our libraries should provide materials and information presenting all points of view on current and historical issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval.
3. Our libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment.
4. Our libraries should cooperate with all persons and groups concerned with resisting abridgment of free expression and free access to ideas.
5. Our libraries do not deny or abridge a person's right to use our libraries because of origin, age, background, or views.
6. Our libraries, which make exhibit spaces and meeting rooms on an equitable basis to the public they serve, regardless of the beliefs or affiliations of individuals or groups requesting their use.
7. Our libraries will not knowingly purchase or retain materials that are judicially determined to be illegal under Oklahoma law.

# **VF 220 Statements Regarding Access to Materials**

## **VF 221 Restricted Access to Library Materials**

*Adopted: 2/73, Revised: 7/81*

### **An Interpretation of ALA's Library Bill of Rights**

Restricting access of certain titles and classes of library materials is a practice common to many libraries in the United States. Collections of these materials are referred to by a variety of names such as "closed shelf," "locked case," "adults only," or "restricted shelf."

Three reasons generally advanced to justify restricted access are:

1. It provides a refuge for materials that belong in the collection but which may be considered "objectionable" by some library patrons;
2. It provides a means for controlling distribution of materials to those who are allegedly not "prepared" for such materials, or who have been labeled less responsible, because of experience, education, or age;
3. It provides a means for controlling distribution of materials from theft and mutilation.

Restricted access to library materials is frequently in opposition to the principles of intellectual freedom. While the limitation differs from direct censorship activities, such as removal of library materials or refusal to purchase certain publications, it nonetheless constitutes censorship, albeit in a subtle form. Restricted access often violates the spirit of the LIBRARY BILL OF RIGHTS in the following ways:

1. It violates that portion of Article 2 which states that "... no partisan or doctrinal disapproval."

"Materials...proscribed" as used in Article 2 includes "suppressed" materials. Restricted access achieves de facto suppression of certain materials.

Even when a title is listed in the catalog with a reference to its restricted status, a barrier is placed between the patron and the publication. Because a majority of materials placed in restricted collections deal with controversial, unusual, or "sensitive" subjects, asking a librarian or circulation clerk for them may be embarrassing for patrons desiring the materials. Because restricted collections are often composed of materials, which some library patrons consider "objectionable," the potential user is predisposed to thinking of the materials as "objectionable," and may be reluctant to ask for them. Although the barrier between the materials and the patron is psychological, it is nonetheless a limitation on access to information.

2. It violates Article 5, which states that, "A person's right to use a library should not be denied or abridged because of..age..."

# **VF 220 Statements Regarding Access to Materials**

## **VF 221 Restricted Access to Library Materials**

*Adopted: 2/73, Revised: 7/81*

Limiting access of certain materials only to adults abridges the use of the library for minors. Access to library materials is an integral part of the right to use a library. Such restrictions are generally with adults who might think so.

Libraries and library boards who would restrict the availability of materials to minors because of actual or anticipated parental objection should bear in mind that they do not serve in loco parentis. The American Library Association holds that it is parents -- and only parents -- who may restrict their children -- and only their children -- from access to library materials and services. Parents who would rather their children not have access to certain materials should so advise their children.

When restricted access is implemented solely to protect materials from theft or mutilation, the practice may be legitimate. However, segregation of materials to protect them must be administered with extreme attention to the reason for restricting access. Too often only "controversial" materials are the subject of such segregation, indicating that factors other than theft and mutilation -- including content -- were the true considerations. When loss rates of items popular with young people are high, this cannot justify the labeling of all minors as irresponsible and the adoption of prejudiced restrictions on the right of minors to use library services and materials.

Selection policies, carefully developed to include principles of intellectual freedom and the Library Bill of Rights, should not be vitiated by administrative practices such as restricted access.

\*See also Free Access to Libraries for Minors, adopted June 30, 1972; amended July 1, 1981, by the ALA Council.

[ISBN 8389-6081-2]

# **VF 220 Statements Regarding Access to Materials**

## **VF 222 Free Access to Libraries for Minors**

*Adopted: 6/72, Revised: 7/81*

### **An Interpretation of ALA's Library Bill of Rights**

Some library procedures and practices effectively deny minors access to certain services and materials available to adults. Such procedures and practices are not in accord with the Library Bill of Rights and are opposed by the American Library Association.

Restrictions take a variety of forms, including, among others, restricted reading rooms for adult use only, library cards limiting circulation of some materials to adults only, closed collections for adult use only, collections limited to teacher use, or restricted according to a student's grade level, and interlibrary loan service for adult use only.

Article 5 of the Library Bill of Rights states that, "A person's right to use a library should not be denied or abridged because of origin, age, background, or views." All limitations on minors' access to library materials and services violates that Article. The "right to use a library" includes use of, and access to, all library materials and services. Thus, practices, which allow adults to use some services, and materials which are denied to minors abridge the use of libraries based on age.

Material selection decisions are often made and restrictions are often initiated under the assumption that certain materials may be "harmful" to minors, or in an effort to avoid controversy with parents. Libraries or library boards who would restrict the access of minors to materials and services because of actual or suspected parental objections should bear in mind that they do not serve in loco parentis. Varied levels of intellectual development among young people and differing family background and child-rearing philosophies are significant factors not accommodated by a uniform policy based upon age.

In today's world, children are exposed to adult life much earlier than in the past. They read materials and view a variety of media on the adult level at home and elsewhere. Current emphasis upon early childhood education has also increased opportunities for young people to learn and to have access to materials, and has decreased the validity of using chronological age as an index to the use of libraries. The period of time during which children are interested in reading materials specifically designed for them grows steadily shorter, and librarians must recognize and adjust to this change if they wish to serve young people effectively. Librarians have a responsibility to ensure that young people have access to a wide range of informational and recreational materials and services that reflects sufficient diversity of meet the young person's needs.

The American Library Association opposes libraries restricting access to library materials and services for minors and holds that it is the parents -- and only parents -- who may restrict their children -- and only their children -- from access to library materials and services for all library users.

# **VF 220 Statements Regarding Access to Materials**

## **VF 222 Free Access to Libraries for Minors**

*Adopted: 6/72, Revised: 7/81*

The word "age" was incorporated into Article 5 of the Library Bill of Rights because young people are entitled to the same access to libraries and to the materials in libraries, as are adults. Materials selection should not be diluted on that account.

[ISBN 8389-5408-1]



# **VF 220 Statements Regarding Access to Materials**

## **VF 223 Expurgation of Library Materials**

*Adopted: 2/73, Revised: 7/81, 1/90*

### **An Interpretation of ALA's Library Bill of Rights**

Expurgating library materials is a violation of the Library Bill of Rights. Expurgation as defined by this interpretation includes any deletion, excision, alteration, editing, or obliteration of any part(s) of books or other library resources by the library, its agent, or its parent institution (if any). By such expurgation, the library is in effect denying access to the complete work and the entire spectrum of ideas that the work intended to express. Such action stands in violation of Articles 1, 2, and 3 of the Library Bill of Rights, which state that "Materials should not be excluded because of the origin, background, or views of those contributing to their creation," that "Materials should not be proscribed or removed because of partisan or doctrinal disapproval," and that "Libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment."

The act of expurgation has serious implications. It involves a determination that it is necessary to restrict access to the complete work. This is censorship. When a work is expurgated, under the assumption that certain portions of that work should be harmful to minors, the situation is no less serious.

Expurgation of any books or other library resources imposes a restriction, without regard to the rights and desires of all library users, by limiting access to ideas and information.

Further expurgation without written permission from the holder of the copyright on the material may violate the copyright provisions of the United States Code.

[ISBN 8389-5419-7]

# **VF 220 Statements Regarding Access to Materials**

## **VF 224 Challenged Materials**

*Adopted: 6/71, Revised: 7/81*

### **An Interpretation of ALA's Library Bill of Rights**

The American Library Association declares as a matter of firm principle that it is the responsibility of every library to have a clearly defined materials selection policy in written form which reflects the Library Bill of Rights, and which is approved by the appropriate governing authority.

Challenged materials, which meet the criteria for selection in the materials selection policy of the library should not be removed under any legal or extra-legal pressure. The Library Bill of Rights states in Article 1 that "Materials should not be excluded because of the origin, background, or views of those contributing to their creation," and in Article 2, that "Materials should not be proscribed or removed because of partisan or doctrinal disapproval." Freedom of expression is protected by the Constitution of the United States, but constitutionally protected expression is often separated from unprotected expression only by a dim and uncertain line. The Constitution requires a procedure designed to focus searchingly on challenged expression before it can be suppressed. An adversary hearing is a part of this procedure.

Therefore, any attempt, be it legal or extra-legal, to regulate or suppress materials in libraries must be closely scrutinized to the end that protected expression is not abridged.

[ISBN 8389-6083-9]

# **VF 220 Statements Regarding Access to Libraries**

## **VF 225 Statement on Labeling**

*Adopted: 7/51, Revised: 6/71, 7/81*

### **An Interpretation of ALA's Library Bill of Rights**

Labeling is the practice of describing or designating certain library materials by affixing a prejudicial label to them or segregating them by a prejudicial system. The American Library Association opposes this as a means of predisposing people's attitudes towards library materials for the following reasons:

1. Labeling is an attempt to prejudice attitudes and as such, it is a censor's tool.
2. Some find it easy and even proper, according to their ethics, to establish criteria for judging publications as objectionable. However, injustice and ignorance rather than justice and enlightenment result from such practices, and the American Library Association opposes the establishment of such criteria.
3. Libraries do not advocate the ideas found in their collections. The presence of books and other resources in a library does not indicate endorsement of their contents by the library.

The American Library Association opposes efforts, which aim at closing any path to knowledge. This statement does not, however, exclude the adoption of organizational schemes designed as directional aids or to facilitate access to materials.

[ISBN 8389-5226-7]

# **VF 220 Statements Regarding Access to Materials**

## **VF 226 Diversity in Collection Development**

*Adopted: 7/82, Revised: 1/90*

### **An Interpretation of ALA's Library Bill of Rights**

Throughout history, the focus of censorship has fluctuated from generation to generation. Books and other materials have not been selected or have been removed from library collections for many reasons, among which are prejudicial language and ideas, political content, economic theory, social philosophies religious beliefs, sexual forms of expression, and other topics of a potentially controversial nature.

Some examples of censorship may include removing or not selecting materials because they are considered by some as racist or sexist; not purchasing conservative religious materials; not selecting materials about or by minorities because it is thought these groups or interests are not represented in a community; or not providing information on or materials from non-mainstream political entities.

Librarians may seek to increase user awareness of materials on various social concerns by many means, including, but not limited to, issuing bibliographies and presenting exhibits and programs.

Librarians have a professional responsibility to be inclusive, not exclusive, in collection development and in the provision of interlibrary loan. Access to all materials legally obtainable should be assured to the user, and policies should not unjustly exclude materials even if they are offensive to the librarian or the user. Collection development should reflect the philosophy inherent in Article 2 of the Library Bill of Rights: "Libraries should provide materials and information presenting all points of view on current and historical issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval." A balanced collection reflects a diversity of materials, not an equality of numbers. Collection development responsibilities include selecting materials in the languages in common use in the community, which the library serves. Collection development and the selection of materials should be done according to professional standards and established selection and review procedures.

There are many complex facets to any issue, and variations of context in which issues may be expressed, discussed, or interpreted. Librarians have a professional responsibility to be fair, just, and equitable and to give all library users equal protection in guarding against violation of the library patron's right to read, view, or listen to materials and resources protected by the First Amendment, no matter what the viewpoint of the author, creator, or selector. Librarians have an obligation to protect library collections from removal of materials based on personal bias or prejudice, and to select and support the access to materials on all subjects that meet, as closely as possible, the needs and interests of all persons in the community which the library serves. This includes materials that reflect political, economic, religious, social, minority, and sexual issues.

# **VF 220 Statements Regarding Access to Materials**

## **VF 226 Diversity in Collection Development**

*Adopted: 7/82, Revised: 1/90*

Intellectual freedom, the essence of equitable library services, provides for free access to all expressions of ideas through which any and all sides of a question, cause, or movement may be explored. Toleration is meaningless without tolerance for what some may consider detestable. Librarians cannot justly permit their own preference to limit their degree of tolerance in collection development, because freedom is indivisible.

[ISBN 8389-6552-0]

# **VF 220 Statements Regarding Access to Materials**

## **VF 227 Evaluating Library Collections**

*Adopted: 2/73, Revised: 7/81*

### **An Interpretation of ALA's Library Bill of Rights**

The continuous review of library materials is necessary as a means of maintaining an active library collection of current interest to users. In the process, materials may be added and physically deteriorated or obsolete materials may be replaced or removed in accordance with the collection maintenance policy of a given library and the needs of the community it serves. Continued evaluation is closely related to the goals and responsibilities of libraries and is a valuable tool of collection development. This procedure is not to be used as a convenient means to remove materials presumed to be controversial or disapproved of by segments of the community. Such abuse of the evaluation function violates the principles of intellectual freedom and is in opposition to the Preamble and Articles 1 and 2 of the Library Bill of Rights, which state:

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

1. Books and other library resources should be provided for the interest, information, and enlightenment of all people of the community the library serves. Materials should not be excluded because of the origin, background, or views of those contributing to their creation.
2. Libraries should provide materials and information presenting all points of view on current and historical issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval.

The American Library Association opposes such "silent censorship" and strongly urges that libraries adopt guidelines setting forth the positive purposes and principles of evaluation of materials in library collections.

# **VF 230 Statements Regarding Access to Services**

## **VF 231 Library Initiated Programs as a Resource**

*Adopted: 1/82*

### **An Interpretation of ALA's Library Bill of Rights**

Library initiated programming is a library resource that provides information, education, and recreation to library users. Library initiated programming utilizes library staff, books, library and community resources, resource people, displays, and media presentations. The library often incorporates cooperative programming with other agencies, organizations, and educational institutions, as well as other resources, to communicate with library users. Library initiated programs should provide "for the interest, information, and enlightenment of all the people of the community the library serves," as stated in Article 1 of the Library Bill of Rights.

The American Library Association believes that library sponsored programs, as well as library resources, "should not be proscribed or removed (or canceled) because of partisan or doctrinal disapproval" (Article 2 of the Library Bill of Rights).

A person's right to attend a library initiated program "should not be denied or abridged because of origin, age, background, or views" (Article 5 of the Library Bill of Rights).

A written policy on library initiated programming, approved by the library's policy-making body, and should reflect the library's philosophy regarding free access to information and ideas. Similarly, concerns expressed regarding library-initiated programs should be handled as they are for library resources.

Selection of library program topics, speakers, courses, classes, and resource materials should be made by library staff on the basis of the interests and needs of library users and the community. Library programming should not exclude topics, books, speakers, media, and other resources because they might be controversial.

# **VF 230 Statements Regarding Access to Services**

## **VF 232 Exhibit Spaces and Meeting Rooms**

*Adopted: 2/81*

### **An Interpretation of ALA's Library Bill of Rights**

As part of their program of service, many libraries provide meeting rooms and exhibit spaces for individuals and groups. Article VI of the Library Bill of Rights states that such facilities should be made available to the public served by the given library "on an equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use."

In formulating this position, the American Library Association sought to accommodate the broad range of practices among public, academic, school and other libraries, while upholding a standard of fairness. Libraries maintaining exhibit and meeting room facilities for outside groups and individuals should develop and publish policy statements governing their use. These statements can properly define and restrict eligibility for use as long as the qualifications do not pertain to the content of a meeting or exhibit or to the beliefs or affiliations of the sponsors.

It is appropriate for a library to limit access to meeting rooms or exhibit space to members of the specific category. It is not proper to apply such limitations in ways, which favor points of view or organizations advocating certain viewpoints. For example, some libraries permit religious groups to use meeting facilities, while others do not. According to Article VI, both policies are acceptable as long as all religious groups are treated in the same way, irrespective of their doctrines.

Exhibits and meetings sponsored by the library itself should be organized in a manner consistent with the Library Bill of Rights, especially Article II which states that "libraries should provide materials and information presenting all points of view." However, in granting meeting or exhibit space to outside individuals and groups, the library should make no effort to censor or amend the content of the exhibit or meeting. Those who object to or disagree with the content of any exhibit or meeting held at the library should be entitled to submit their own exhibit or meeting proposals which should be judged according to the policies established by the library. The library may properly limit the use of its meeting rooms to meetings which are open to the public, or it may make space available, for both public and private sessions. Again, however, the same standard should be applicable to all.

[ISBN 8389-6464-8]



# **VF 200 Position Statements**

## **VF 240 Access to Resources and Services in the School Library Media Program**

### **An Interpretation of ALA's Library Bill of Rights**

The school library media program plays a unique role in promoting intellectual freedom. It serves as a point of voluntary access to information and ideas and as a learning laboratory for students as they acquire critical thinking and problem solving skills needed in a pluralistic society. Although the educational level and program of the school necessarily shapes the resources and services of a school library media program, the principles of the Library Bill of Rights apply equally to all libraries, including school library media programs.

School library media professionals assume a leadership role in promoting the principles of intellectual freedom within the school by providing resources and services that create and sustain an atmosphere of free inquiry. School library media professionals work closely with teachers to integrate instructional activities in classroom units designed to equip students to locate, evaluate, and use a broad range of ideas effectively. Through resources, programming, and educational processes, students and teachers experience the free and robust debate characteristic of a democratic society.

School library media professionals cooperate with other individuals in building collections of resources appropriate to the developmental and maturity levels of students. These collections provide resources, which support the curriculum and are consistent with the philosophy, goals, and objectives of the school district. Resources in school library media collections represent diverse points of view and current as well as historical issues.

While English is, by history and tradition, the customary language of the United States, the languages in use in any given community may vary. Schools serving communities in which other languages are used make efforts to accommodate the needs of students for whom English is a second language. To support these efforts, and to ensure equal access to resources and services, the school library media program provides resources, which reflect the linguistic pluralism of the community.

Members of the school community involved in the collection development process employ educational criteria to select resources unfettered by their personal, political, social, or religious views. Students and educators served by the school library media program have access to resources and services free of constraints resulting from personal, partisan, or doctrinal disapproval. School library media professionals resist efforts by individuals to define what is appropriate for all students or teachers to read, view, or hear.

# VF 300 Privacy

## VF 310 Policy on Confidentiality of Library Records

*Adopted: 1/71, Revised: 7/75*

The Council of the American Library Association strongly recommends that the responsible officers of each library in the United States:

1. Formally adopt a policy which specifically recognizes its circulation records and other records identifying the names of library users to be confidential in nature.
2. Advise all librarians and library employees that such records shall not be made available to any agency of state, federal, or local government except pursuant to such process, order, or subpoena as may be authorized under the authority of, and pursuant to, federal, state, or local law relating to civil, criminal, or administrative discovery procedures or legislative investigative power.
3. Resist the issuance or enforcement of any such process, order or subpoena until such time as a proper showing of good cause has been made in a court of competent jurisdiction. \*

***\*Note:** Point 3, above, means that upon receipt of such process, order, or subpoena, the library's officers will consult with their legal counsel to determine if such process, order, or subpoena is in proper form and if there is a showing of good cause for its issuance; if the process, order, or subpoena is not in proper form or if good cause has not been shown, they will insist that such defects be cured.*

**VF 300 Privacy**  
**VF 320 Policy on Governmental Intimidation**  
*Adopted: 2/73, Revised: 7/81*

**ALA's Policy on Governmental Intimidation**

The American Library Association opposes any use of governmental prerogatives, which leads to the intimidation of the individual or the citizenry from the exercise of free expression. ALA encourages resistance to such abuse of governmental power, and supports those against whom such governmental power has been employed.

[ISBN 8389-5421-9]

# **VG 100 Governance and Oversight**

## **VG 110 Metropolitan Library Commission By-Laws**

*Adopted: 10/77, Revised: 10/82; 7/86; 3/98, 12/99; 11/07*

- I. Name:

The name of this Commission shall be the Metropolitan Library Commission of Oklahoma County, herein called the "Commission." The name of the system shall be the "Metropolitan Library System."
- II. Membership:
  - A. Commission membership shall conform to provisions of the Oklahoma Metropolitan Library Act. (65 O.S. 2001, Section 554, rev. 2007)
    - 1) The Metropolitan Library Commission of Oklahoma County shall consist of twenty seven (27) members
      - a) Thirteen (13) members shall be appointed by the mayor of the county seat city, subject to the approval of the governing body of that city.
      - b) One (1) member shall be appointed by the board of county commissioners to serve as an at-large member of the commission representing citizens living in areas of the county not otherwise represented by an appointee.
      - c) One (1) member from each municipality in the county which has a library or library extension located within the boundaries of the municipality and which is a part of the Metropolitan Library System, who shall be appointed by the mayor of each municipality respectively, subject to the approval of the governing body of each municipality.
      - d) The mayor of the county seat city and the chairman of the board of Oklahoma County commissioners shall be ex officio members and shall be entitled to vote on all matters.
    - 2) The terms of appointments by either the county seat city, the mayors of the municipalities or the county at large seat shall be for three year terms. Terms begin August 1 and expire July 31 except in the case of an appointment to fill a vacancy in the membership of the commission, which latter appointment shall be for the balance of the unexpired term of the vacated seat.
  - B. Commission members should reside within the corporate boundaries of Oklahoma County and/or Oklahoma City.
  - C. Oath of Office. All present, appointed Commission members and future, appointed Commission members shall affirm and sign an Oath of Office; see Attachment A.
  - D. Conflict of Interest Statement. All present, appointed Commission members and future, appointed Commission members shall affirm and sign a Conflict of Interest Statement; see Attachment B.

# **VG 100 Governance and Oversight**

## **VG 110 Metropolitan Library Commission By-Laws**

*Adopted: 10/77, Revised: 10/82; 7/86; 3/98, 12/99; 11/07*

### **III. Officers:**

A. Titles. The Metropolitan Library Commission's officers shall include a Chairman, a Vice-Chairman and a Disbursing Agent, all of whom are entitled to a vote on any question before the Commission, and a Secretary, who does not have the right to vote on matters before the Commission.

B. Each officer-elect shall serve a term of one (1) year or until a successor is elected. Each officer-elect shall be eligible for re-election and there is no limit on the number of terms any elected officer may serve. The Secretary shall serve at the discretion of the Commission.

#### **C. Duties of Officer-Electors.**

1. The Chairman shall preside at all meetings of the Commission, appoint all standing and special committees, issue policy statements adopted by the Commission from time to time, and execute such documents as may be necessary in the performance of the Commission's function. The Chairman shall also serve as an ex-officio (non-voting) member of all committees except the Nominating Committee. The Chairman is authorized to countersign checks.
2. The Vice-Chairman shall perform all of the duties of the Chairman during the Chairman's absence or during any disability, which prevents the Chairman from performing his duties. In the event the office of Chairman is vacated and the vacancy occurs no more than 60 days in advance of the annual election of officers in January, the Vice-Chairman shall serve as Chairman until the new election. If the vacancy occurs more than 60 days in advance of the annual election of officers in January, a special election shall be held as specified in the By-Laws of the Metropolitan Library Commission Section III G - Vacancy in Office. The Vice-Chairman is authorized to countersign checks.
3. The Disbursing Agent shall chair the Finance and Audit Committee and conduct meetings in the absence of the Chairman and Vice-Chairman. The Disbursing Agent is authorized to countersign checks.

#### **D. Duties of the Secretary.**

The Executive Director, who shall serve as Secretary to the Commission, shall have sole charge of the Administration of the library system under the authority and review of the Commission. The Executive Director shall be held responsible for the care of the buildings and equipment owned or leased by the library system, for the employment and direction of the staff, the collection of library books and other library materials and various services and information to the

# **VG 100 Governance and Oversight**

## **VG 110 Metropolitan Library Commission By-Laws**

*Adopted: 10/77, Revised: 10/82; 7/86; 3/98, 12/99; 11/07*

public, and for the operation of the library system within the provisions of the annual budget. The Executive Director, as Secretary to the Commission, shall attend all meetings except those at which his appointment, salary or relations with other members of the staff are to be discussed or decided. The Secretary shall be responsible for keeping full and complete minutes and records of all proceedings and business of the Commission, including committee proceedings, shall give due notice of all meetings and shall countersign checks.

### **E. Nomination of Officers.**

At the regular meeting in December of each year, the Chairman shall appoint a Nominating Committee of three Commission members and designate the chairman of the committee. The Chairman, the Secretary and elected (ex-officio) members are not eligible to serve on the Nominating Committee. If no December meeting is held, the Chairman shall notify all members of the Commission, in writing, of the names of those appointed to the Nominating Committee. This written notification shall be mailed before December 31. Members of the Nominating Committee shall hold at least one meeting between the time of their appointment and the January meeting, which is the annual election meeting.

### **F. Election of Officers.**

The Nominating Committee shall present nominations for Chairman, Vice-Chairman, and Disbursing Agent at the January meeting. If, for any reason, the election is not held during the month of January, it shall be held at the next regular meeting of the Commission.

### **G. Vacancy in Office**

Special elections to fill unexpired terms of all officers except the office of Chairman as described in Section III C-2 above shall be scheduled as follows: a Nominating Committee shall be formed at the first regular meeting of the Commission following word of the vacancy and an election shall be held at the subsequent regular meeting.

### **H. Installation of Officers**

Newly elected officers shall assume their offices immediately following the balloting at the election meeting.

## **IV. Meetings.**

All meetings of the Commission and its committees shall conform to provisions of the Oklahoma Open Meeting Act; adequate, advance, public notice of each

# **VG 100 Governance and Oversight**

## **VG 110 Metropolitan Library Commission By-Laws**

*Adopted: 10/77, Revised: 10/82; 7/86; 3/98, 12/99; 11/07*

meeting shall be provided by the Secretary or the Chairman; all meetings except those authorized to be held in Executive Sessions\* shall be open to the public; votes shall be by roll call; and minutes shall record individual members' votes on each motion. Commission members shall respect the confidentiality of all matters discussed and reviewed in Executive Sessions. Any notes taken by Commission members in Executive Sessions which serve as a record of what transpired during an Executive Session with the exception of motions to be made in the subsequent open session shall be turned over to the Secretary for retention. The Secretary shall retain such notes along with the minutes taken by the Secretary of the Executive Session.

### **A. Regularly Scheduled.**

Regular Commission meetings shall be held on the third Thursday of each month with the exception of meetings in August and December; the August meeting shall be held on the fourth Thursday to accommodate action on the final annual budget and the December meeting shall be held on the second Thursday to accommodate seasonal holiday scheduling conflicts. The date, time and place of any regular monthly meeting may be changed in compliance with the Oklahoma Open Meeting Act.

\*Executive sessions of public bodies, according to the Open Meeting Act, such as the Metropolitan Library Commission, will be permitted only for the purpose of:

1. Discussing the employment, hiring, appointment, promotion, demotion, disciplining or resignation of any individual salaried public officer or employee.
2. Discussing negotiations concerning employees and representatives of employee groups.
3. Discussing the purchase or appraisal of real property.
4. Confidential communications between a public body and its attorney concerning a pending investigation, claim or action if the public body, with the advice of its attorney, determines that disclosure will seriously impair the ability of the public body to process the claim or conduct a pending investigation, litigation, or proceeding in the public interest.
5. Discussing any matter where disclosure of information would violate confidentiality requirements of state or federal law.

# **VG 100 Governance and Oversight**

## **VG 110 Metropolitan Library Commission By-Laws**

*Adopted: 10/77, Revised: 10/82; 7/86; 3/98, 12/99; 11/07*

**B. Irregularly Scheduled.**

Special meetings of the Commission-as-a-whole may be held on call of the Chairman at such times and places as may be designated by the Chairman. Other officers may also call special meetings of the Commission-as-a-whole on petition of a minimum of seven (7) voting members (electors) of the Commission. Gatherings of committees at the call of the Chairman or Secretary or an individual committee chairman shall be considered "special meetings" of the Commission. Public notice shall be given at least two (2) working days before special meetings and all members shall take care to see that all other provisions of the Oklahoma Open Meeting Act are observed. Emergency meetings shall be at the call of the Commission officers and shall be in conformity with relevant provisions of the Oklahoma Open Meeting Act.

**C. Parliamentary Authority**

The rules contained in the latest Robert's Rules of Order shall govern parliamentary procedure at each meeting in all cases to which they apply and in which they are not inconsistent with the Metropolitan Library Act or other By-Laws of the Metropolitan Library Commission.

**D. Procedure.**

Action by the Commission on any matter to be decided by it shall be by majority vote of those present, provided a quorum is present.

**E. Placing Items on Agenda.**

The Chairman of the Commission or a designated Chairman appointed by the Chairman shall, in consultation with the Secretary and Committee Chairman set the agenda for all Commission meetings and Committee meetings to include:

1. Committee meetings, reports and proposed actions or motions proposed for Commission review or action.
2. Proposed reports or motions from the Secretary on behalf of the library system.
3. Any other related reports or presentations proposed for Commission review or action.
4. An action or motion for Commission or Committee review or action presented to the Chairman or elected Commission officer in the form of a petition of a minimum of seven (7) voting members (electors) of the Commission shall be placed on the agenda for the next respective scheduled Commission or Committee meeting.



# **VG 100 Governance and Oversight**

## **VG 110 Metropolitan Library Commission By-Laws**

*Adopted: 10/77, Revised: 10/82; 7/86; 3/98, 12/99; 11/07*

**F. Attendance at Meetings.**

Barring notice of an emergency and unforeseen circumstances, appointed members of the Commission are urged to attend at least sixty percent (60%) of Commission meetings and respective or appointed appropriate Committee meetings.

**G. Vote to "Abstain" Recorded as "No (Abstain)".**

A vote by a Commission member on a motion to "Abstain" shall be recorded as a negative, "No (Abstain)" vote in the minutes. Members present who fail to vote for any reason may affect the voting result negatively. Members desiring not to vote on a motion as an expression of neutrality or to avoid any appearance of conflict of interest are encouraged to vacate the meeting room during said voting, returning immediately after same. The minutes will reflect their absence during said vote.

**V. Committees.**

The following standing committees, consisting of no fewer than five (5) nor more than seven (7) members each, shall be appointed by the Chairman, with each member serving for a term of one (1) year or until a successor is appointed:

A. Administrative and Personnel Committee;

B. Finance and Audit Committee;

C. Long-Range Planning Committee;

D. Public Services Committee.

Special committees may be appointed by the Chairman to handle matters clearly outside the purview of the standing committees.

**VI. Defense against Claims or Actions; Indemnification.**

A. The library system shall maintain an adequate level of liability insurance coverage for library trust (Commissioners), officers, employees and volunteers.

B. In cases not covered by insurance or state statute, when a trustee, officer, employee or volunteer is sued over an alleged act or omission while acting in good faith for a purpose considered to be in the best interest of the library system and within the scope of his/her duties as a trustee, officer, employee or volunteer, the library system should, at the request of the trustee, officer, employee or volunteer:

1. Appear and defend against the claim or action; and

# **VG 100 Governance and Oversight**

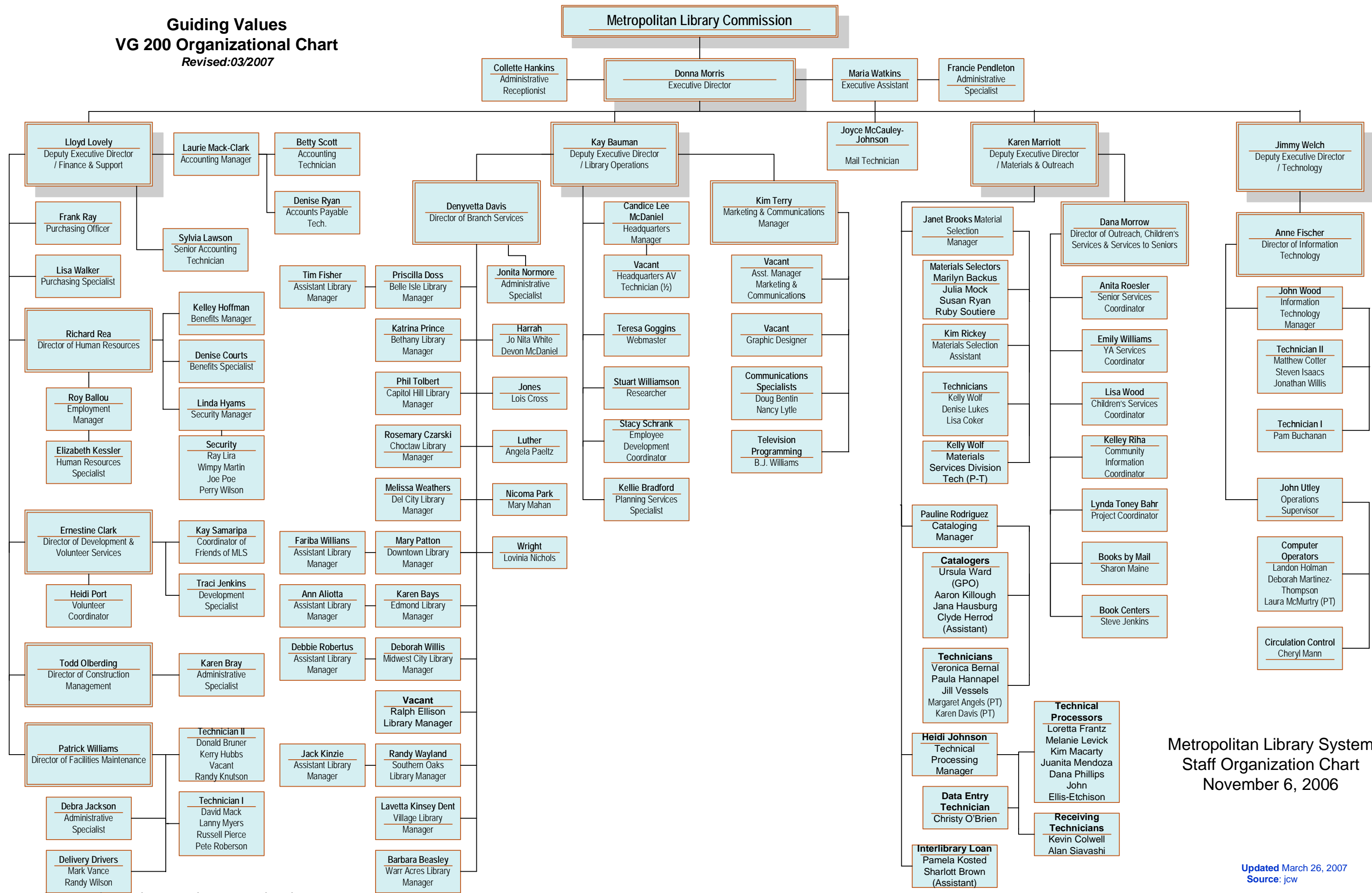
## **VG 110 Metropolitan Library Commission By-Laws**

*Adopted: 10/77, Revised: 10/82; 7/86; 3/98, 12/99; 11/07*

2. Pay or indemnify the trustee, officer, employee or volunteer for judgment and court costs based on such claim or action; and
  3. Pay or indemnify the trustee, officer, employee or volunteer for a compromise or settlement of such claims or action, providing the settlement is approved by the Metropolitan Library Commission.
- C. The decision as to whether the system shall retain its own attorney or reimburse the trustee, officer, employee or volunteer expenses for his/her own legal counsel shall rest with the Metropolitan Library Commission and shall be determined by the nature of the claim or action.
- D. The term trustee, officer, employee or volunteer shall include any former trustee, officer, employee or volunteer of the library system.
- VII. Amendments to By-Laws.
- These By-Laws may be amended at any regular quorum of the Commission by a three-fourths vote of those present, provided the amendment was submitted in writing at a previous meeting of the Commission. These By-Laws shall automatically be amended to the extent required by a valid constitutional amendment or change in the laws governing the Commission or its operation.
- The above By-Laws were duly amended by resolution of the Commission at a regular meeting thereof held on

Donna L. Morris, Secretary

**Guiding Values**  
**VG 200 Organizational Chart**  
*Revised:03/2007*



**Metropolitan Library System**  
**Staff Organization Chart**  
**November 6, 2006**

Updated March 26, 2007  
Source: jcw

# **VG 300 Legislation**

## **VG 330 Open Records Act**

*Revised: 11/02*

### **Purpose**

This establishes reasonable access to Metropolitan Library System records subject to release under the Oklahoma Open Records Act (51 O.S. 24A.1. et seq, eff. June 1, 2001), protects the integrity and organization of Library records, and helps prevent disruption of the Library's essential functions.

### **Language of the Law**

"Record" means all documents, including, but not limited to, any book, paper, photograph, microfilm, data files created by or used with computer software, computer tape, disk, and record, sound recording, film recording, video record or other material regardless of physical form or characteristic, created by, received by, under the authority of, or coming into the custody, control or possession of public officials, public bodies, or their representatives in connection with the transaction of public business, the expenditure of public funds or the administering of public property. "Record" does not mean computer software, non-government personal effects or, unless public disclosure is required by other laws or regulations, vehicle movement records of the Oklahoma Turnpike Authority obtained in connection with the Authority's electronic toll collection system, personal financial information, credit reports or other financial data obtained by or submitted to a public body for the purpose of evaluating credit worthiness, obtaining a license, permit or for the purpose of becoming qualified to contract with a public body.

"Public official" means any official or employee of any public body.

**Note:** *Any document available for public inspection under the Open Records Act that contains information deemed confidential by law will be edited prior to releasing the document for public inspection.*

### **Inspecting and Copying of Public Records**

- A. Consistent with the policy, duties and procedures established by the Oklahoma Open Records Act, records custodians will provide full access and assistance in a timely and efficient manner to persons who request access to open public records.
- B. Records custodians will protect the integrity and organization of public records with respect to the manner in which such records are inspected and copied.
- C. Records custodians will seek to prevent disruption of essential functions but will provide records at the earliest possible time.

# **VG 300 Legislation**

## **VG 330 Open Records Act**

*Revised: 11/02*

- D. Records custodians will perform or supervise all inspections and/or copying of public records.
- E. If the requester cannot provide sufficient information to identify a record, the records custodian will help make the identification.
- F. Hours for accepting requests for inspection or copying will be all regular working hours.
- G. Open public records may not be removed from the location where they are kept and maintained.
- H. If the records custodian denies inspection and/or copying or mechanical reproduction of any record, the records custodian must report such denial in writing or by e-mail to the Executive Director's office along with the reason for the denial.

**Note:** *Records custodians are listed in Appendix A.*

### **Fees**

For each request, the first 10 pages of printed copies will be provided free of charge. The fee for subsequent copies will equal the fee per copy charged by copy machines available to Library customers.

The fee for other types of copies (computer disks, videos, sound recordings, etc.) will take into consideration the cost of reproduction and be comparable to the fee charged for print copies.

A \$2.00 fee will be charged for each quarter (1/4) hour spent conducting a document search.

Fees are due when copies are provided to the requesting party, with the following exception: If a large amount of copies is requested, a deposit equivalent to 50 percent of the anticipated total reproduction cost will be required before copies are made; the remainder will be due when copies are provided.

Library officers or employees will not be charged reproduction fees when requesting records necessary to perform their official duties.

### **General Exceptions**

The act does not apply to records determined confidential by law. These include library users' records, protected by Section 1-105 of Title 65, Oklahoma Statutes; and the home

# **VG 300 Legislation**

## **VG 330 Open Records Act**

*Revised: 11/02*

addresses of current and former employees, protected by Section 24A.7 of Title 51, Oklahoma Statutes.

### **Specific Exceptions**

The following list of exceptions to the Oklahoma Open Records Act is not intended to be all-inclusive and other exceptions may apply.

A. Unless persons who may be adversely affected from disclosure of their personnel records specifically consent to disclosure, personnel records shall be kept confidential:

- which relate to internal personnel investigations, including examination and selection material for employment, appointment, promotion, demotion, discipline or resignation; or,
- Where disclosure would constitute a clearly unwarranted invasion of personal privacy such as employee evaluations, payroll deductions, or employment applications submitted by persons not hired by the Library.

**Note:** *All personnel records not falling within the exceptions are available for public inspection and copying including, but not limited to, records of:*

1. Employment applications of public employees
2. Gross receipts of public funds
3. Dates of employment, title or position
4. Any final disciplinary action resulting in loss of pay, suspension, demotion of position or termination

**Note:** *Unless confidential by statute, an employee of a public body has the right to access his or her own personnel file.*

B. Purchasing records may be kept confidential if disclosure would give an unfair advantage to competitors or bidders. Considered confidential are:

1. Bid specifications for competitive bidding prior to publication by the Library
2. Contents of sealed bids prior to the opening of bids
3. Appraisals relating to the sale or acquisition of real estate by the Library prior to award of a contract

# **VG 300 Legislation**

## **VG 330 Open Records Act**

*Revised: 11/02*

- C. Concerning data processing, computer programs or software may be kept confidential but not the data thereon.
- D. Gifts or donations where anonymity is a condition of the donation as follows:
  - 1. Library, archive or museum materials donated to the Library to the extent of any limitations imposed as a condition of the donation or any information which would reveal the identity of an individual who lawfully makes a donation if anonymity of the donor is a condition of the donation;
  - 2. Library, archive or museum materials donated to the Library that may be claimed as a tax deduction, to the extent of any limitations imposed as a condition of donation except the date of the donation, the appraised value claimed for the donation, and a general description of the materials donated and their quantity.
- E. Records coming into the Library's possession from the federal government or records generated or gathered as a result of federal legislation may be kept confidential to the extent required by federal law.
- F. Personal communications received at the Library may be kept confidential except the fact that a communication has been received and that it is or is not a complaint. A written response to personal communications may be kept confidential only to the extent necessary to protect the identity of the other person.
- G. Working papers, personal notes and preliminary data an employee gathers to prepare a report or make a recommendation may be kept confidential, but only until the recommendation or report is submitted. At that time, all preliminary information and notes that are saved become public records.
- H. Documents protected by the attorney - client privilege, both those noted as such or and ones not so noted
- I. Records made during an executive session portion of a public meeting.

# **VG 330 Open Records Act**

## **VG 331 Records Custodians**

*Revised: 12/02*

Director's Office:	Executive Director Executive Assistant Administrative Assistant
Public Services Administration:	Deputy Director of MLS for Public Services Director of Branch Services Administrative Assistant Administrative Secretary
Public Services Libraries:	Library Manager Assistant Library Manager Librarian in Charge
Development and Volunteer Services:	Director of Development Coordinator – Friends of the MLS Development Assistant Volunteer Coordinator
Planning Services:	Director of Planning Employee Development Coordinator Researcher Webmaster Planning Specialist
Marketing & Communications:	Director of Marketing/Communications Asst. Director of Marketing/Communications Communications Specialist Graphic Designer
Information Technology:	Deputy Director of MLS for Information Technology Director of Information Technology Computer Operations Supervisor
Support Services:	Director of Construction Maintenance
Maintenance Office:	Director of Facilities Management Administrative Assistant
Human Resources Office:	Director of Human Resources Benefits Manager Assistant Benefits Manager Employment Manager



# **VG 330 Open Records Act**

## **VG 331 Records Custodians**

*Revised: 12/02*

	Human Resources Specialist
Business Office:	Director of Finance Accounting Manager Purchasing Officer Purchasing Specialist Sr. Accounting Technician Accounting Technician Accounts Payable Technician
Materials Selection and Management:	Director of Materials Services Materials Selection Manager Materials Selectors Materials Selection Assistant Materials Selection Technician
Outreach Services:	Director of Outreach Services Book Center Coordinator Children's Services Coordinator Community Information Coordinator Senior Services Coordinator Young Adult Services Coordinator Outreach Technician
Cataloging:	Cataloging Manager Cataloger in Charge
Interlibrary Loan:	Interlibrary Loan Technician Interlibrary Loan Assistant
Technical Processing:	Technical Processing Manager Data Entry Technician

# **VG 331 Records Custodians**

## **VG 331.1 Record Custodians' Guide to the Oklahoma Open Records Act**

***Adopted: 11/02***

Taken from 51 O.S. 24A.1. et seq, eff, June 1, 2002.

"Record" means all documents, including, but not limited to, any book, paper, photograph, microfilm, data files created by our used with computer software, computer tape, disk, and record, sound recording, film recording, video record or other material regardless of physical form or characteristic, created by, received by, under the authority of, or coming into the custody, control or possession of public officials, public bodies, or their representatives in connection with the transaction of public business, the expenditure of public funds or the administering of public property. "Record" does not mean computer software, non-government personal effects or, public disclosure is required by other laws or regulations, vehicle movement records of the Authority's electronic toll collection system, personal financial information, credit reports or other financial data obtained by or submitted to a public body for the purpose of evaluating credit worthiness, obtaining a license, permit or for the purpose of becoming qualified to contract with a public body.

"Public official" means any official or employee of any public body as defined herein.

### **General Exceptions**

The act does not apply to records specifically required by law to be kept confidential. This includes library users' records, which are protected by the Section 1-105 of Title 65, Oklahoma Statutes, which became effective November 1, 1985, and the home addresses of current and former employees, which are protected by Section 24A.7 of Title 51, which became effective September 1, 1994.

### **Specific Exceptions**

A. Personnel records may be kept confidential:

Which relate to internal personnel investigations, including examination and selection material for employment, hiring, appointment, promotion, demotion, discipline, or resignation; or,

Where disclosure would constitute a clearly unwarranted invasion of personal privacy such as employee evaluations, payroll deductions, or employment applications submitted by persons not hired by the library.

***Note:*** All personnel records not specifically falling within the exceptions are available for public inspection and copying including, but not limited to, records of:

1. An employment application of a person who becomes a public employee;

# **VG 331 Records Custodians**

## **VG 331.1 Record Custodians' Guide to the Oklahoma Open Records Act**

***Adopted: 11/02***

2. The gross receipts of public funds;
3. The dates of employment, title or position; and
4. Any final disciplinary action resulting in loss of pay, suspension, demotion of position, or termination.

Except as may otherwise be confidential by statute, an employee of a public body shall have a right of access to his or her own personnel file.

Public bodies shall keep confidential the home address of any person employed or formerly employed by the public body.

- B. Purchasing records may be kept confidential if disclosure would give an unfair advantage to competitors or bidders as follows:

Bid specifications for competitive bidding prior to publication by the library; or,

Contents of sealed bids prior to the opening of bids; or,

Appraisals relating to the sale or acquisition of real estate by the library prior to award of a contract.

- C. Data Processing records as follows:

Computer programs or software but not data thereon.

- D. Gifts or donations where anonymity is a condition of the donation as follows:

Library, archive or museum materials donated to the library to the extent of any limitations imposed as a condition of the donation or any information which would reveal the identity of an individual who lawfully makes a donation if anonymity of the donor is a condition of the donation;

Library, archive or museum materials donated to the library that may be claimed as a tax deduction, to the extent of any limitations imposed as a condition of donation except the date of the donation, the appraised value claimed for the donation, and a general description of the materials donated and their quantity.

- E. Records coming into the possession of the library from the federal government or records generated or gathered as a result of federal legislation may be kept confidential to the extent required by federal law.

# **VG 331 Records Custodians**

## **VG 331.1 Record Custodians' Guide to the Oklahoma Open Records Act**

*Adopted: 11/02*

- F. Personal communications received at the library may be kept confidential except for the fact that a communication has been received and that it is or is not a complaint. A written response to this personal communication may be kept confidential only to the extent necessary to protect the identity of the other person.
- G. Working papers, personal notes and preliminary data that an employee may gather in preparing a report or making a recommendation may be kept confidential, but only until the recommendation or report is submitted. At that time, all of the preliminary information and notes, which are kept, become public records.

### **Inspection and Copying or Mechanical Reproduction**

Providing access to public records and the fee involved in the copying or mechanical reproduction of them are fully described in the Open Records Act Procedure and the Fee Schedule adopted by the library.

According to a statement of the Attorney General of the State of Oklahoma in November 2000, the law does not require filling out a form to receive public records. The requesting party doesn't even have to provide their name.

# **VH 100 History of the MLS**

## **VH 110 Chronology of the Metropolitan Library System**

*Revised: 5/98*

- 1898** First library established in Oklahoma City, 11 years after the founding of the city. Two women's study groups, Philomatheia and San Souci, collected 600 books, obtained a charter and got Oklahoma City businessmen to buy \$500 worth of stock. The library was housed in one room of the Farmer's National Bank Building on the southwest corner of Grand and Robinson.
- 1901** The new Carnegie Library opened at NW Third and Robinson. Andrew Carnegie donated \$25,000 for the building, with the stipulation the city would provide \$2,000 a year for the library's operation.
- 1909** The Carnegie Library was enlarged, thanks to \$35,000 from Carnegie and \$4,800 from the city. The expanded library was hailed as one of the finest in the Southwest.
- 1921** Dunbar Branch was founded to serve the city's black population.
- 1925** Wright Branch opened in the Stockyards City area at 2101 Exchange.
- Dunbar Branch moved to a new building and new site at 613 N.E. 4. The city appropriated \$5,000 for the building and furnishings. The Federated Colored Club of Oklahoma City donated the site.
- 1945** A bond issue was passed providing \$500,000 for a new library.
- 1947** The Carnegie Library's name was changed to the Oklahoma City Libraries.
- 1949** The Junior League's Community Workshop adult education program moved to the Main Library.
- 1950** A bond issue providing \$800,000 for new libraries was passed. This brought total available funds to \$1,322,000. Building plans included a large Main Library on the site of the old building and a new library for Capitol Hill.
- 1951** The Community Workshop became a department of the Oklahoma City Libraries.
- The Capitol Hill Library opened at 334 SW 26.

- 1954** The new Main Library was dedicated. It replaced the old Carnegie Library which had been built 53 years before to serve a population of 10,000.
- 1955** The Midwest City Library opened at 3210 Belaire, formerly part of the clubhouse of the Municipal Golf Course Center.
- 1958** The Del City Library opened at 3644 SE 15.
- 1960** A state law (Article 10, Section 10A, 1960, of the Oklahoma Constitution) was all passed to establish the funding for public libraries. Voters in eligible counties were allowed to assess a "special annual recurring ad valorem tax levy of not less than one mill nor more than two mills on the dollar of assessed valuation of taxable property in the county...for public library funding.
- 1963** The Belle Isle Library opened at 5501 N. Villa.
- 1964** The Midwest City Library moved to expanded quarters in another part of the old golf course clubhouse.
- Oklahoma County voters approved a 1.9 mill ad valorem tax to establish a city-county library system.
- 1965** The Metropolitan Library Act (Title 65, Chapter 9), which established the method of organizing a city-county library system was passed. Under the provisions of the Act, the Metropolitan Library Commission was created as the governing body, with the power to establish, maintain and operate the city-county system.
- On July 1, the Oklahoma County Library System was established. A lease and agreement between Oklahoma City and the Metropolitan Library Commission brought the five Oklahoma City Libraries (Main, Belle Isle, Capitol Hill, Dunbar Wright) into the library system.
- The Bethany Library, which had opened earlier in the year at 3510 N. Mueller, joined the system, as did the Del City Library and the Midwest City Library.
- 1966** The Del City Branch Library moved to new quarters in the Del City Community Center, 4509 SE 15.
- The Southern Hills Branch Library opened in a leased storefront at 1501 SW 74 in the Southern Hills Shopping Center.
- The Village Branch Library opened in a leased storefront at 9304 Penn Place in the Casady Square Shopping Center.

- 1967** The Edmond Branch Library opened in a leased storefront in the Edmond Plaza Shopping Center.
- The Northeast Branch Library opened in a leased storefront at 3719 Springlake Drive in the Park Plaza Shopping Center.
- The Warr Acres Branch opened in a new building at 5901 NW 63.
- 1968** The Dunbar Branch closed because of Urban Renewal.
- 1970** Oklahoma City voters passed a \$1.1 million bond issue to build new libraries in the southwest and northeast quadrants of the city.
- 1971** An automated acquisitions system, one of the first and most efficient in the nation among public libraries, began to operate.
- 1973** The Edmond Branch moved to a new building at 10 S. Boulevard.
- A task force of temporary employees began systematic inventory of the system's materials--the first in its history--to prepare for an automated circulation system.
- 1974** County voters rejected a 1/10th of a mill increase in the library levy on September 17.
- 1975** Two new branch libraries opened. Ralph Ellison Branch, 2000 N.E. 23, replaced the storefront Northeast Branch, and Southern Oaks Branch, 6900 S. Walker, replaced the storefront Southern Hills Branch.
- Inflation forced the libraries to reduce service hours by 22 percent and staff by 8 percent. Most branches closed on Mondays and curtailed evening service after 7:30 p.m. However, lower-cost services increased when the system began serving some 60-70 institutions such as nursing homes and retirement homes with small book collections, and began providing part-time staffing to Nicoma Park Extension Library (reading center) in the city hall there.
- 1976** County voters (58 percent) and voters across the state (52 percent) approved State Question 507, raising the constitutional permissive ceiling on library support from 2 to 4 mills.
- 1977** The Metropolitan Library Commission of Oklahoma county adopted a new name for the Oklahoma County Library System on October 20: The Metropolitan Library System in Oklahoma County. The new name reflects the system's independent status and broad service area.

The system's five bookmobiles were all "grounded" due to budget restrictions and high petroleum costs. All were placed in semi-permanent locations across the county, and opened on sharply reduced schedules (2-4 days per week) except for the unit at NW 23 and Meridian, which continued on a five-day schedule.

- 1978** A group of library supporters organized the Friends of the Metropolitan Library System.

Four cities-- Bethany, Edmond, Midwest City and Oklahoma City--for the first time shared federal revenue funds with the library system to help with needed branch library repairs and improvements.

The Choctaw Extension Library (reading center) opened on March 9 in a city furnished building at N.E. 23 and Main.

- 1980** More than 500 volunteers, active between January and April, obtained nearly 26,000 signatures of Oklahoma County voters on a petition for an election to increase library tax support from 1.9 to 3.4 mills.

The mill levy issue, on the ballot in the November general election, failed by a 52-48 percent margin.

The library system converted its outdated card catalog, which lists the system's holdings of books and other materials, to modern, updated microfilm catalogs at all locations. Funding was primarily from state and other grants.

State aid jumped from \$19,080 in 1979 to \$163,412.

- 1981** Severe budget projections required the system to cut service hours by over 9 at a percent, including reduction of evening hours from three to one night per week at eight branches. The service cuts took effect in July. The book budget was frozen low level and needed audio-visual items were not budgeted.

State aid rose to \$208,153.

Oklahoma County Commissioners voted on November 16 to call a special rate election January 12, 1982, for county voters to decide if the system's library tax should increase from 1.9 to 3.4 mills.

The Citizens for Library Support organized some 1,000 volunteers to campaign



for the election.

- 1982** County voters, by a 76-24 percent margin, on January 12 approved the new 3.4-mill library tax to take effect July 1, 1982.

The Oklahoma Legislature passed an amendment to the Metropolitan Library Act which increased the number of Metropolitan Library Commissioners from 11 to 19. The new board, effective August 1, 1982, has ten members appointed by the mayor of Oklahoma City; one member appointed by the Board of County Commissioners; one by the mayor of each of the following cities: Bethany, Del City, Edmond, Midwest City, The Village and Warr Acres; the mayor of Oklahoma City and the chairman of the Board of County Commissioners serve as ex-officio members.

The Metropolitan Library Commission approved a budget of \$4.8-million for FY 82-83; included were needs for 47.5 new employees and a budget of \$575,000 for books and other materials--both designed to fulfill pledges of more service hours and more books for the system.

- 1983** The library system initiated a year-round "planning process" for assessing library and information needs, planning and evaluating services to meet those needs. A 15-member library advisory committee of community representatives from business, education, etc., was appointed to review the planning process. The initial planning cycle will be completed in November 1984.

The Metropolitan Library Commission approved a budget totaling \$6.6 million for FY 83-84; the budget included major capital funding to increase and upgrade the library system's computerized circulation and management information systems.

- 1984** The library system initiated Phase I of the Long-Range Automation Plan including purchase and installation of a Tandem computer mainframe in the Capitol Hill Library to serve the entire system. The integrated, on-line automation system will be completed within approximately three years.

The Metropolitan Library Commission approved a preliminary budget or Estimate of Needs in May totaling \$7.3-million. For the first time in the history of the library system, the library materials budget exceeded \$1-million (\$1,019,156).

- 1985** Groundbreaking for new Midwest City Library after passage of \$2.85 million capital improvements program; original 26,000 sq. ft. structure expanded to 35,000 square feet during construction.

Special programming, publicity and promotional events in celebration of the library system's 20th anniversary; Friends of the Library provided major underwriting.

- 1986** John Cotton Dana awarded to Ralph Ellison Library by the American Library Association and H.W. Wilson Company for successful publicity and public services programs.

Friends of the Metropolitan Library System received the "Outstanding Large their Public Library Friends Award" from the Friends of Libraries USA (FOLUSA) for accomplishments and programs of service.

Filled newly-created position of Associate Director for Public Services to facilitate planning and direction of all public services.

Former Harrah bookmobile replaced with a remodeled Library Extension Building provided by the city of Harrah.

Establishment of the Friends Library Endowment Trust and appointment of initial seven trustees to begin fund-raising activities.

Construction of new Maintenance Service Center on purchased property at N.E. Third and Kate to consolidate maintenance services, equipment storage and housing of Outreach Services.

- 1987** Library system chosen as one of 30 libraries nationwide to host a touring the U.S.

exhibition entitled "Are We To Be A Nation?" in celebration of the Bicentennial of Constitution. The exhibit was displayed in the Midwest City Library.

Friends of the Library annual booksale, held in February, grossed over \$77,000, surpassing previous year's total by \$13,000.

Library patrons were afforded instant access to information on availability and status of materials with the purchase of 17 Public Access Catalogs (PACs); additional automation processors were also purchased to handle the estimated 3,300 increased transactions per day.

The library topped the 3-million volume circulation level, representing a tripling in materials circulated since 1966 and a 16.6% increase over the previous year's circulation.

The 36,600-sq. ft. Midwest City Library officially opened on September 14.

Opening events included the sealing of a time capsule to be opened in 50 years. Voters in The Village overwhelmingly approved a 1/2-cent sales tax increase for \$1-million to construct a new library on a site donated in 1970 for library use.

Oklahoma City Community Foundation awarded the library system and the American Institute of Architects a \$25,000 grant to fund a Centennial project consisting of a guidebook and a map of significant historical landmarks in greater Oklahoma City and environs.

- 1988** Federal LSCA Title II grants of \$175,000 were received through the Oklahoma Department of Libraries for assistance in construction of the new Village Library and expansion of the Belle Isle Library. The expansion added 6,600 square feet of usable public service space to the Belle Isle Library.

The Library Endowment Trust honored well-known author and past library employee Robert L. Duncan at a reception attended by various civic leaders and dignitaries.

State legislation providing penalties for theft of library materials was signed into law. Persons convicted of theft of less than \$500 can now be fined up to \$500; theft of property worth more than the \$500 can result in a fine of up to \$10,000.

A triptych commissioned by the City of Midwest City of nationally known Library. landscape artist Wilson Hurley was hung and dedicated at the new Midwest City. The \$75,000 work depicts an Oklahoma prairie landscape during and after a thunderstorm.

- 1989** Library system circulation exceeded the 4 million mark in one fiscal year for the first time in its 24-year history. A celebration to commemorate the occasion was held at the Bethany Library in tandem with a salute to Dairy Queen Brazier of Oklahoma County, the system's long-time summer reading program co-sponsor.

- 1990** The Village Library, replacing the last storefront facility in the system, opened in May. The 14,044 square foot library, with a capacity of 70,000 volumes, is designed to provide state-of-the-art services including a multi-purpose meeting room and designated areas for children and young adults. It features a specially commissioned stained-glass mural depicting library-related themes.

The Metropolitan Library System celebrated its 25th anniversary in September. When the library system was formed in 1965, according to the Metropolitan Library Act, it opened the doors of every public library in Oklahoma County to all residents. It also streamlined the operation of each library and improved the

service each could provide. On its 25th anniversary, the system had 11 full-service libraries, four extension libraries and five bookmobiles. A day filled with activities, dubbed Super Saturday, recognized the event.

- 1991** The Library Endowment Trust launched its first major fund-raising campaign to secure a \$1 million endowment fund. Ultimate hopes are to build a \$3 million fund, which will perpetually support enrichment of the library's materials, services and programs. The campaign was given a major boost by a \$25,000 challenge grant from the Presbyterian Health Foundation and a \$150,000 challenge grant from local philanthropist Edith Gaylord Harper.

The Harrah Library moved into a newly restored building, the former First State Bank, donated in 1987 for use as a library by the Frank Swan family of Harrah. Funding for the renovation project included a \$5,000 grant from the Friends of the Library and \$5,000 for furnishings from the library system.

A modification to the library system's online access computer program allowed patrons to begin renewing books and other materials from their home, school or office. The modification enhanced the online access system, which was first introduced in 1989. The service makes access to the library catalog and other databases possible 24 hours a day, seven days a week.

The Fiscal Year 1991/92 budget was down 2.9 percent from the previous FY. 1.6 Rather than cut services, the Metropolitan Library Commission scaled back maintenance and repairs to buildings and deposits to reserve accounts. The budget for books and other materials was held at 13.4 percent of the total budget, percent short of the desired 15 percent. A Friends grant, totaling \$41,838, helped boost the amount available for books. The Friends of the Metropolitan Library System established the Lee B. Brawner Scholarship, honoring the executive director for 20 years employment with the system.

- 1992** Read About It, a television show promoting reading, books and the library with system's services premiered Feb. 2 on Cox Cable. The show includes interviews authors, book reviews, interviews with people in the community who enjoy books and reading. The library entered the world of television in 1951 with Creative Crafts on Channel 4. In 1963, Money and You and Medicine and You were added. The shows aired on Channel 4 until 1988, when they began appearing on KAUT-FOX 43. Read About It took the place of these earlier endeavors.

- 1993** Oklahoma County voters said "Yes!" to a .6 mill levy increase in property taxes to help bolster the library system's annual operating budget by more than \$1 million. The increase, passed by a 62 percent margin, halted a decline in operating

dollars that had threatened library services during the previous three fiscal years and had fostered a 23 percent drop in the allocation for books and other materials. With the new monies, the library commission was able to restore funds to the materials budget, tackle maintenance projects that had been placed on hold, increase staffing and launch an upgrade to the automation support system. The volunteer group, Citizens for Library Support, spearheaded the successful election campaign.

In late September the Midwest City Library joined the Belle Isle, Edmond and also Southern Oaks libraries in offering service on Sunday afternoons. Patrons in the Eastern part of the county had long awaited Sunday hours. Operating hours were extended at The Village and Wright libraries. An increase in the library system's operating budget made possible the additional operating hours at all three sites.

On December 14 Oklahoma City voters approved a five-year, one-cent increase in the city's sales tax to fund MAPS, nine building projects for the downtown area, including a technologically adaptable Downtown Library/Learning Center. The new facility will replace the library located at 131 Dean A. McGee. That library was constructed in 1950 and has outlived its useful life as a library. Along with the new library/learning center, voters approved a new baseball park, convention center improvements, a 20,000 seat arena, remodeling of the Civic Center Music Hall, renovations at the State Fairgrounds and public transit links between the fairgrounds and downtown Oklahoma City.

Metropolitan Library Commission chair Sharon Saulmon was elected president of the national American Library Trustee Association (ALTA) for the 1994-95 term. She was the first library trustee from Oklahoma to be elected to this prestigious national post.

**1994** In August, keyword searching was added to the numerous convenient features already available through the library system's Metropolitan Automated Resource Service, or MARS. The new feature lets customers search for items in the computerized catalog of books and other materials with words related to the needed information. The feature is valuable when customers are unaware of titles, authors and other data related to the information. MARS may be used by anyone with a valid library card. The program lets customers renew books, reserve materials and view their record of borrowed items, among other things. Customers may log on to MARS at the library or from personal computers at home, school or office.

The Friends of the Metropolitan Library System, always on the grow, hired a full-time administrative secretary. The library system provided office space in the Development and Volunteer Services Department located in the basement of the Downtown Library.

Voters supported State Question 666 during the Nov. 8 general election, and the State Constitution was amended to specify that voters in each county can create a single-county public library system supported by ad valorem funds. Also, voters in counties with 150,000 population or more, or served by a multi-county library system that includes a county with 150,000 or more, can now approve up to 6 mills in ad valorem taxes to fund libraries. Prior to the vote the State Constitution placed the cap at 4 mills. At the time of the vote, funding for the Metropolitan Library System was at the 4-mill cap.

**1995**

In late January Magazine Abstracts and Article Delivery (MAAD) was added to the Metropolitan Automated Resources Service (MARS). The new feature gives customers access to a database of more than one million article abstracts and about half that many full-text articles. The service may be utilized from either computers in the libraries or from users' homes, schools or offices with a suitably equipped computer and modem.

On April 19 a bomb exploded on the north side of the Alfred P. Murrah Federal to Building, destroying the nine-story structure and killing 168 men, women and children. Like thousands, the library family suffered. One of our valued Booksale volunteers, Jean Thompson, lost her son Michael who worked in the Social Security office located on the building's second floor. Jean Latham, Downtown Library security officer, lost several friends. The library staff lost those federal employees who spent their lunch hours in the Downtown Library and the day care center children who so loved our storytimes. The Downtown Library, located just one block south of the bombsite, lost 90 percent of its windows, also ceiling tiles fell and light fixtures were ruined. The staff was displaced from the building for three weeks, while repairs were made and the building was cleared from top floor basement. On May 24, the building was reopened for regular library service. People from all over the downtown rushed in to welcome us back.

Thousands of returned books stacked up during a July power outage that many affected the entire community and crippled the library system's computer functions for four days. The staff weathered the storm with smiles and when electricity was restored, everyone joined in for a quick game of catch up. How books were there to check in after four days? Approximately 60,000. Also during the outage, the staff checked out books to customers manually, like in the pre-computer days; and each one of the check outs, carefully recorded on paper, had to be entered into the computer as well.

The Friends of the Library contributed \$75,100 in grant funds to the library, 1981 including underwriting to refurbish the staff lounge and landscaping at the Downtown Library, both of which were damaged in the April 19 bombing. Since the Friends have contributed over \$730,000 to the library.

**1996**

The Friends of the Metropolitan Library System expanded BOOKSALE to include all the space available in the Made In Oklahoma Building. The expansion paid

off: Gross profits were \$26,000 more than the 1995 fundraiser.

Members of the library community cheered the resounding defeat of State to the Question 669, which failed by a two-to-one margin during the March 12 Super Tuesday election. The question, the subject of heated debate in the weeks prior election, proposed rolling back property taxes to 1993 levels and restricting future increases, a situation that would have reduced funding to libraries, schools, county governments and other public services. The Metropolitan Library Commission and Citizens for Library Support joined a broad coalition of business, education and government leaders to oppose the measure.

In April the Nicoma Park Library moved from a room at city hall into one-half of a new community center. The move gave the library twice the space, a better children's area and more room for programs.

On May 28 the Del City Library reached its 30th year of service. The library was built in 1966 as part of a new community center including a fire station, meeting rooms, a banquet hall and the 8,000-square-foot library.

The library's system's web page, <http://www.mls.lib.ok.us>, became a part of Cyberspace in late August.

On August 27 Edmond voters approved funding for expanding the Edmond Library by 10,000 square feet and to add additional parking.

September 3 marked the beginning of Internet access for the public. The new the service was launched as a pilot project at the Downtown Library, where three Internet computers were made available for customer use. Almost immediately, service was popular, attracting its first user by 9:15 a.m.

Oklahomans for Children and Families attended the October commission meeting to challenge five books.

**1997** Sixty-five percent of voters gave thumbs up to the library system's plans for mill expansion and renovation by approving a 1.06 millage increase during a Feb. 11 election. 15,907 yes votes were cast, easily bypassing the 8,438 no votes. The levy was added to property owners' ad valorem taxes and raised the library system's total millage allocation from 4.14 mills to 5.2 mills.

In February the Administrative/Personnel and Public Services committees of the

Metropolitan Library Commission held a 5-hour hearing, open to the public, to gather input on the library system's open access policy. The hearing was prompted by complaints from Oklahomans for Children and Families that the policy should be changed to restricted children's access to some materials.

Approximately 100 citizens attended the session held at the Belle Isle Library, and both sides of the issue were addressed. At the end of the meeting the committee members agreed to recommend that open access to all materials be retained for all library customers.

In April the full commission unanimously reaffirmed the open access policy. At the same time the governing board approved a parental preference option, which lets parents who elect to do so, create an individualized borrowing profile for each their children. The unique concept was pioneered by this library system.

During the June commission meeting, Bob Anderson of Oklahomans for Children and Families charged that the movie *The Tin Drum*, owned by the library system, contained child pornography. Within a week the movie had been banned in Oklahoma County and all video copies confiscated from the library and video rental stores. The incident sparked litigation that would involve several parties, numerous attorneys and the continued ban of the movie. (See *Tin Drum* timeline for complete details.)

A crowd of more than 200 attended an organizational meeting for Citizens Supporting Open Libraries (CSOL). The mission of the group is to combat censorship attacks against the Metropolitan Library System.

**1998** Music CDs were added to the collection. Included were rock 'n roll, classical, jazz, blues, country, gospel, movie sound tracks, every type of music imaginable.

MLS celebrates the 100th anniversary of library service for Oklahoma County at with an evening of storytelling and readings by authors Michael Wallis and Anna Meyers. The festivities were during National Library Week, on Tuesday, April 21, the Midwest City Library. A grant from the Friends of the Metropolitan Library System made the evening possible.

A project to provide Internet access to the public at each of the 12 full service libraries, launched in 1996, was completed in May.

Also in May, the Friends of the Library celebrated their 20th anniversary. It was noted that during their 20 years of supporting the library system, the Friends have contributed more than \$1,000,000 in the form of grants. The valued dollars have enhanced library services for Oklahoma County by funding materials, programs and services over and above those funded by the library system's annual operating budget.

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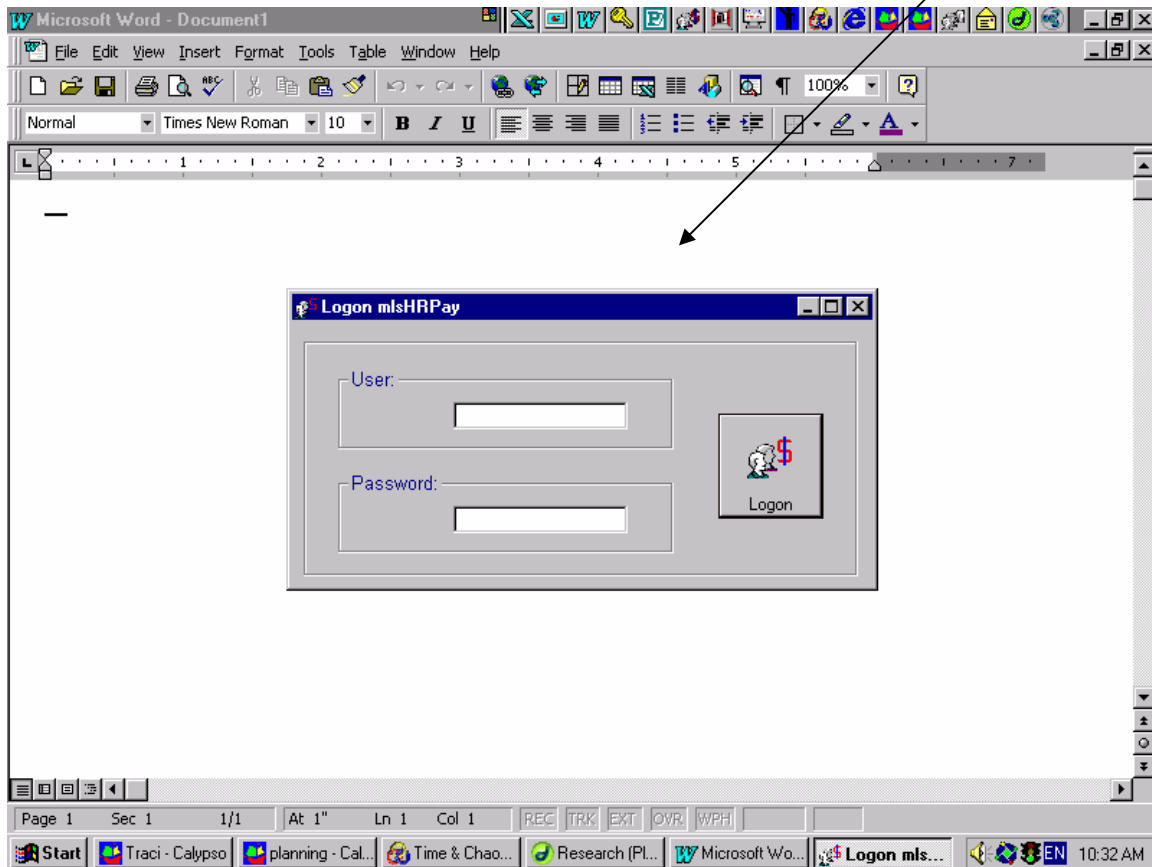
# Introduction to mlsHRPay

The following information is not covered during the GOAL session, but is included here for reference when you report to your job location and receive on-the-job training from your supervisor.

## Basics to mlsHRPay

- a. To enter mlsHRPay, the employee will **select the mlsHRPay icon**, which will start up the program. The user will be prompted with the following message:
- b. The employee will **enter his/her user ID**, which will be the social security number. Also, a password must be entered before clicking the "Logon".
- c. Upon entering the password, click on "Logon".

The first screen that the employee will see is "Time Entry."



Metropolitan Library System's Human Resources and

Split Full Active Inactive Term. Retired All New Refresh Print Find List Exit

Name  
JINKENS, TRACI N.

Reserved Admin Payroll Pay Estimate Reserved User  
Reserved Deduction Flex Retirement Reserved Reports  
Information Verification Query Emergency Attendance Comp.

Time Entry Summary View Leave Leave Balance Auto Entry Factors

JINKENS, TRACI N.

Hours Type Date Begin End Hours Program  
Regular 9 /16/02 08:00:AM 05:00:PM .00 PLA Planning

Add Reset

Choose Pay Period  
Sep 16, 2002--Sep 29, 2002 Print Timesheet Print Approval

Date	Begin	End	Hours	Description	FmLA	Paid	Program
Mon, Sep 16, 2002	07:30 AM	04:30 PM	8.00	Regular	N	Y	Planning
Mon, Sep 16, 2002	12:00 PM	01:00 PM	1.00	Meal Time	N	N	Planning
Tue, Sep 17, 2002	07:30 AM	04:30 PM	8.00	Regular	N	Y	Planning
Tue, Sep 17, 2002	12:00 PM	01:00 PM	1.00	Meal Time	N	N	Planning
Wed, Sep 18, 2002	07:30 AM	04:30 PM	8.00	Regular	N	Y	Planning
Wed, Sep 18, 2002	12:00 PM	01:00 PM	1.00	Meal Time	N	N	Planning

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

JINKENS, TRACI N. Administrative Secretary 9/16/02

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- d. From this screen, the employee will be able to change various factors in determining their pay period.

The choices available are:

- **Type:** The default is "Regular". To change the type, click on the drop down arrow and choose from selections, such as "Leave", "Meal Time", "Overtime", and "Holiday".
- **Date:** The default is today's date. To change date, click on the drop down arrow or click inside the box and change manually.
- **Begin:** The default is 8:00 AM. To change this, the user can click inside the box and change manually or use the up and down arrows located just to the right of the time.
- **End:** The default is 5:00 PM. To change this, the user can click inside the box and change manually or use the up and down arrows located just to the right of the time.

- **Hours:** Enter the total hours of working time (leave time) here.

e. If an employee chooses "Leave", a new menu will show up on the screen.

To change the "Leave Type", click on the drop down arrow and choose from the various options available, such as "Annual Vacation", "Sick Leave", "Doctor/Dental", "Vote", and many more.

When making any type of changes to your pay period record, be sure and change the "Date", "Begin", and "End" times, as well as the "Hours". The "Program" should already be defaulted to your permanent place of employment.

- Once the employee has made a change to any date, s/he must click on the "Add" button. This will incorporate the information into the pay period. If a problem exists, a message will pop up on the screen, notifying the employee of conflicting information.
- Prior to each pay period, the employee will need to furnish the manager/supervisor with his/her timesheet and leave used. To do this, the employee will need to click on "Print Timesheet." This will print up the timesheet for the current pay period. To print up the leave used, the

employee will need to click on "Print Approval." This function will print up two copies. Both copies will need to be signed by the employee and given to the manager/supervisor. Upon approval, the employee will receive one copy back with the manager's/supervisor's signature. This copy should be retained for the employee's records.

If an employee needs to make changes to his/her pay period, s/he can click on the date that needs to be changed.

**Metropolitan Library System's Human Resources and Payroll**

Name: JINKENS, TRACI N.

Time Entry Summary View Leave Leave Balance Auto Entry Factors

**JINKENS, TRACI N.**

Hours Type Date Begin End Hours Program

Regular 9/16/02 07:30:AM 04:30:PM 8.00 PLA Planning

Update Remove Reset

Choose Pay Period

Sep 16, 2002--Sep 29, 2002 Print Timesheet Print Approval

Date	Begin	End	Hours	Description	FmLA	Paid	Program
Mon, Sep 16, 2002	07:30 AM	04:30 PM	8.00	Regular	N	Y	Planning
Mon, Sep 16, 2002	12:00 PM	01:00 PM	1.00	Meal Time	N	N	Planning
Tue, Sep 17, 2002	07:30 AM	04:30 PM	8.00	Regular	N	Y	Planning
Tue, Sep 17, 2002	12:00 PM	01:00 PM	1.00	Meal Time	N	N	Planning
Wed, Sep 18, 2002	07:30 AM	04:30 PM	8.00	Regular	N	Y	Planning
Wed, Sep 18, 2002	12:00 PM	01:00 PM	1.00	Meal Time	N	N	Planning

JINKENS, TRACI N. Administrative Secretary 9/16/02

This information will show up under the "Hours". The employee can then change the information. Click on "Update" or "Remove" and the changes will be entered.

- h. Another feature of the mlsHRPay is the "Summary" tab. The "Summary" tab can be used to "double-check" all of the hours have been accounted for and correctly sum up the total number of hours for the pay period. This is especially helpful when an employee has multiple changes to a pay period and s/he isn't sure if everything adds up correctly from the "Time Entry" screen.

Metropolitan Library System's Human Resources and Payroll

Name: JINKENS, TRACI N.

Choose Pay Period: Sep 16, 2002--Sep 29, 2002

	Week One	Week Two	Total
Hours Regular	40.00	40.00	80.00
Hours Overtime	.00	.00	.00
<b>Total</b>	<b>40.00</b>	<b>40.00</b>	<b>80.00</b>

JINKENS, TRACI N. Administrative Secretary 9/16/02

Start Traci - Cal... planning - ... Time & Ch... Research ... Microsoft ... Metropo... 10:58 AM

- i. Another great feature of mlsHRPay is the "View Leave" tab. This tab allows the user to view all of the leave taken throughout the calendar year.

**Metropolitan Library System's Human Resources and Payroll**

Name: JINKENS, TRACI N.

From: 1/1/02 To: 12/31/02

☒ Include All ☐ FMLA Only ☐ Unpaid Leave Only

Type Leave: All (dropdown menu)

Show button

Total Hours: 160.75

Date	Begin	End	Hours	Description	FmLA	Paid	Program
Thu, Jan 03, 2002	07:30 AM	04:30 PM	8.00	Sick	N	Y	Business Office
Fri, Jan 04, 2002	07:30 AM	04:30 PM	8.00	Sick	N	Y	Business Office
Fri, Jan 11, 2002	03:00 PM	04:30 PM	1.50	Annual Vacation	N	Y	Business Office
Tue, Jan 29, 2002	02:00 PM	04:30 PM	2.50	Doctor/Dental	N	Y	Business Office
Wed, Jan 30, 2002	07:30 AM	04:30 PM	8.00	Floating Holiday	N	Y	Business Office
Thu, Jan 31, 2002	07:30 AM	04:30 PM	8.00	Inclement Weather	N	Y	Business Office
Thu, Feb 21, 2002	02:30 PM	04:30 PM	2.00	Annual Vacation	N	Y	Business Office
Wed, Mar 20, 2002	07:30 AM	04:30 PM	8.00	Annual Vacation	N	Y	Planning
Thu, Mar 21, 2002	07:30 AM	04:30 PM	8.00	Annual Vacation	N	Y	Planning

Administrative Secretary 9/16/02

The employee can change what type of leave is viewed by clicking on the arrows under "Type Leave". Once a selection has been made, click on the "Show" button.

The "Leave Balance" tab is very helpful to employees because it shows all the leave available, how much leave has been used, Floating Holiday balance, and sick leave hours.

There are three columns of information. The first column "AVL" includes all of the information an employee would need regarding vacation time.

<b>Projected for year</b>	Total number of hours per that individual
<b>Bonus earned last year</b>	Dependent on sick leave usage (For more information, read Policy & Procedures manual)
<b>Carryover past year</b>	Vacation hours brought over from previous year
<b>Earned year to date</b>	Vacation hours earned year to date
<b>Accumulated year to date</b>	Carryover + Earned
<b>Used year to date</b>	Vacation hours used year to date
<b>Scheduled</b>	Vacation hours scheduled year to date
<b>Total used/sched year to date</b>	Used + Scheduled
<b>Current balance</b>	Accumulated – Total used/sched year to date

<b>Projected earnings/year end</b>	Vacation hours remaining
<b>Uncommitted</b>	Current balance + Projected earnings
<b>Possible to carryover</b>	Possible vacation hours to carryover to next year
<b>Will need to take</b>	Vacation hours an employee must take before year end

The "Floating Holiday" column consists of:

The beginning balance, what have been used year to date, hours scheduled, and the current balance. All full-time employees receive a total of 16 hours of floating holiday.

The "Sick Leave" column includes:

The beginning balance, number of hours accumulated year to date, hours used year to date, the current balance, and any sick hours scheduled.

The next tab, which is helpful for employees with "set" schedules, is the "Auto Entry" tab.



An employee can set up his/her schedule, which would then consistently show up on their "Time Entry" screen. No changes would have to be made, unless an employee used leave time in that particular pay period. To set up the time entry feature, an employee would fill in the appropriate hours and meal time hours. Once all of the information has been entered, click on "Apply".

**NOTE:** On the days that an employee does not work (e.g. Saturday and Sunday as in the case above), the beginning and end times, as well as the meal times are all 12:00 AM. This special feature allows those days to not show up when working with the time sheet.

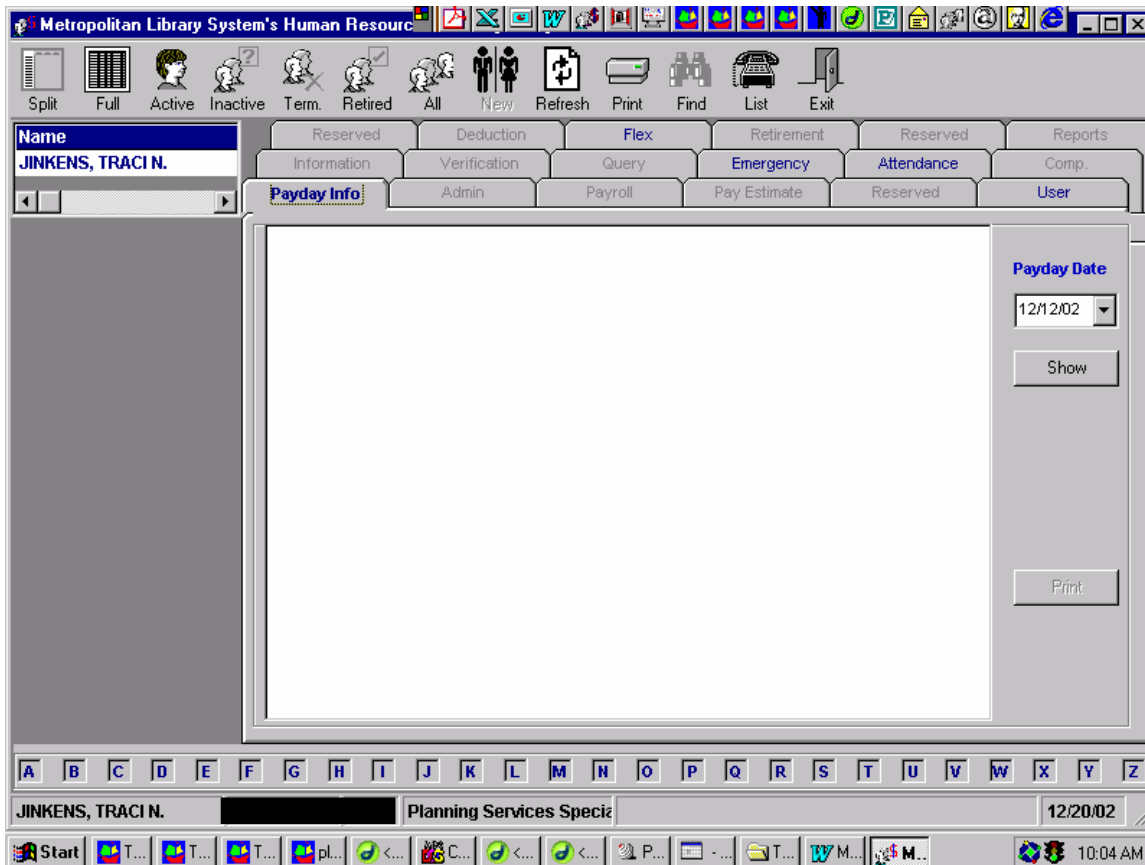
Other features included in the mlsHRPay are the "Emergency" tab, the "Flex" tab, and the "User" tab.

On the "Emergency" tab, the employee will have contact information for emergencies located here.

On the "Flex" tab, the employee will be able to see everything that has taken place within their flex account for the calendar year. (Flex plans are optional. For further information regarding enrolling in Flex plans, contact the Benefits Manager.)

On the "User" tab, an employee can change their password. In order for the change to take place, click on "Change Password."

A new feature for the mlsHRPay database is the 'Payday Info' tab. For security purposes, only the employee will be able to access his/her payroll information. The supervisor will not be able to access the employee's records. For any particular pay period, the payday information will show up on the employee's record a day before payday. This new feature also allows for employees to print up their pay stub. Furthermore, the 'Payday Info' helps employees keep track of payday information for tax purposes.



<b>Projected earnings/year end</b>	Vacation hours remaining
<b>Uncommitted</b>	Current balance + Projected earnings
<b>Possible to carryover</b>	Possible vacation hours to carryover to next year
<b>Will need to take</b>	Vacation hours an employee must take before year end

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