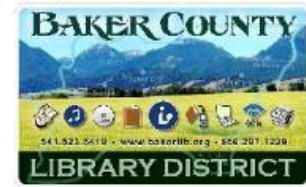


Regular Meeting Agenda

Baker County Library District

Board of Directors

Kyra Rohner, President



Tuesday, Sep 15, 2026, 5:00 pm

Riverside Meeting Room, Baker County Public Library

2400 Resort St, Baker City, Oregon

Remote access provided [via Zoom](#)

Phone: +1 669 900 9128

Meeting ID: 861 4429 3530

Passcode: 190067

- I. Call to Order
 - II. Roll Call
 - III. Consent Agenda (**ACTION**)
 - *Additions/deletions from agenda*
 - *Minutes of previous meeting*
 - IV. Conflicts or Potential Conflicts of Interest
 - V. Open Forum / Public Comment & Communications
 - VI. Old Business
 - a. Policy Update – Collection Development & Materials Review Request Form (**ACTION**)
 - VII. New Business
 - a. *Audit Services Contract Award* (**ACTION**)
 - VIII. Reports
 - a. *Director's Report*
 - b. *Financial Report*
 - IX. Next Meeting
- Date/Time:** Oct 13, 2026, 5:00 pm
- X. Adjournment

The times of all agenda items except open forum are approximate and are subject to change.

The Board of Directors generally meets on the **second Tuesday of each month from 5:00 to 6:00 p.m.** in the **Riverside Meeting Room at 2400 Resort Street, Baker City, Oregon**. Sign-language interpretation is available upon request with at least 48 hours' notice.

Library Board Meeting – Annotated Agenda

Tuesday, Sep 15, 2026, 5:00 pm

Notes prepared by Library Director Perry Stokes

Annotated Agenda

- | | |
|---|---------------|
| I. CALL TO ORDER | Rohner |
| II. Roll Call | Rohner |
| III. Consent agenda (ACTION) | Rohner |
| a. Additions/deletions from the agenda | |
| b. Minutes of previous meeting(s) | |

Attachments:

- III.b.i. Board meeting minutes, Aug 11, 2026

- | | |
|---|---------------|
| IV. Conflicts or potential conflicts of interest | Rohner |
| V. Open Forum / Public Comment & Communications | Rohner |
| VI. OLD BUSINESS | |
| a. Policy Update – Collection Development & Materials Resources Review Request Form (ACTION) | |

Attachments:

- VI.a.i. Materials Selection & Withdrawal Policy (current 2019 version)
- VI.a.ii. Collection Development Policy (proposed 2026 superseding draft)
- VI.a.iii. Materials Review Request Form (current 2024 version)
- VI.a.iv. Resource Review Request Form (proposed 2026 superseding draft)
- VI.a.v. Summary of Key Changes

This item returns as Old Business following the Board's August 11, 2026 review. The Board is asked to replace the District's 2019 Materials Selection & Withdrawal Policy with the proposed Collection Development Policy and to approve a revised Request for Review of Library Materials Form aligned with the new policy.

The proposed policy modernizes the District's collection framework for digital resources, licensed content, streaming services, Library of Things collections, and other contemporary formats. It also aligns terminology with current District policies and clarifies selection, retention, withdrawal, and reconsideration procedures.

Staff reviewed the District's existing documents, related BCLD policies, and current model policies and guidance from Oregon and national public-library organizations, including Deschutes Public Library, Multnomah County Library, King County Library System, Washington County Cooperative Library Services, Corvallis-Benton County Public Library, Sno-Isle Libraries, the Oregon Library Association, and the American Library Association.

Key Policy Changes:

- Broadens the definition of library materials and resources to encompass current and emerging formats.
- Strengthens the policy's intellectual-freedom, viewpoint-neutrality, and parental-responsibility provisions.
- Clarifies the respective responsibilities of the Board, Library Director, and staff.
- Expands the criteria governing selection, retention, withdrawal, digital resources, and nontraditional collections.

Library Board Meeting – Annotated Agenda

Tuesday, Sep 15, 2026, 5:00 pm

Notes prepared by Library Director Perry Stokes

- Establishes a consistent reconsideration process: informal consultation, formal request, professional review, a written Director decision, and a limited appeal to the Board.
- Provides that challenged materials ordinarily remain available while a review is pending.
- Defines requester eligibility, filing limits, repeat-review provisions, decision timelines, and appeal procedures.

Please refer to the accompanying summary for a detailed comparison of the current and proposed documents.

Form Changes: The revised Request for Review of Library Materials Form is streamlined and aligned with the proposed policy. It retains eligibility for adult Baker County residents or cardholders and the limit of one request every 30 days; simplifies the informal-consultation requirement; removes the discretionary fee and nonessential philosophical questions; extends coverage to digital and nontraditional resources; and clarifies privacy, public-records, review, decision, and appeal information.

Suggested Motion: “I move to approve the revised Baker County Library District Collection Development Policy and Request for Review of Library Resource Form as presented, effective September 15, 2026, superseding the 2019 Materials Selection and Withdrawal Policy and the 2024 review form.”

VII. New Business

a. Audit Services Contract Award (ACTION)

Attachments:

- VII.a.i. Audit Services Request for Proposals
- VII.a.ii. Audit services proposals received
- VII.a.iii. Proposal evaluation summary and staff recommendation
- VII.a.iv. Proposed audit services agreement

The District solicited proposals from qualified firms to perform its annual financial-statement audit and related reporting. Staff will summarize the solicitation process, proposals received, and comparative evaluation before presenting a recommended firm for Board consideration.

The evaluation considered each firm’s qualifications, governmental-audit experience, proposed approach and schedule, references, independence, insurance coverage, and total cost. The proposed completion schedule was also considered; proposals supporting timely filing without an extension received stronger consideration, although a first-year extension was permitted. The Board is asked to review the evaluation, select a firm, and authorize completion of the agreement within the approved budget.

Suggested Motion: “I move to award the Baker County Library District audit services contract to [audit firm] and authorize the Library Director to negotiate and execute the agreement, subject to final terms consistent with the firm’s proposal and the District’s approved budget.”

Library Board Meeting – Annotated Agenda

Tuesday, Sep 15, 2026, 5:00 pm

Notes prepared by Library Director Perry Stokes

VIII. REPORTS

a. Director's

Stokes

Attachments:

- VIII.a.i. Director's Report, Sep 2026

b. Financial

Hawes

Finance report materials will be provided at the meeting.

IX. Agenda Items for the Next Regular Meeting: Oct 13, 2026

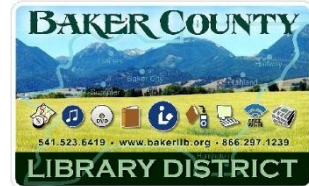
Rohner

- Topics TBD

X. ADJOURNMENT

Rohner

Baker County Library District
Library Board of Directors
Regular Meeting Minutes
Aug 11, 2026



CALL TO ORDER

The meeting was held in the Riverside Meeting Room at Baker County Public Library, 2400 Resort Street, Baker City, Oregon, the administrative building of the District.

Director Ashley **McClay** attended in person. Also attending in person were Perry **Stokes**, Library Director, and Christine **Hawes**, Business Manager. Directors Kyra **Rohner**, Joan **Spriggs**, and Jacque **Cobb** attended via Zoom. No members of the public attended in person or via Zoom.

Stokes reported that Beth Bigelow had notified him that she was unable to attend.

President Kyra **Rohner** **called the meeting to order at 5:03 p.m.** Four directors were present, establishing a quorum.

Roll call was taken. Directors Rohner, McClay, Spriggs, and Cobb were present, along with Stokes and Hawes.

CONSENT AGENDA

Rohner asked whether there were any additions to or deletions from the agenda, or any corrections to the minutes of the previous meeting. Stokes added another form to the Collection Development materials.

McClay moved to adopt the agenda as amended and approve the minutes of the July 14, 2026, meeting. Spriggs seconded the motion. The motion passed unanimously, with four votes in favor.

CONFLICTS OF INTEREST

Rohner asked whether any conflicts or potential conflicts of interest should be declared. None were declared.

OPEN FORUM / CITIZEN COMMENTS

Rohner invited citizen comments. No members of the public were present. Stokes reported that the Library had received very positive feedback about the Choose Your Own Adventure activity offered in July and said he would provide additional information later in the meeting.

Rohner asked about options for renewing books and whether there were ways patrons could retain a book for an extended period. She requested that the topic be added to a future discussion.

OLD BUSINESS

None

Rohner stated for the record there was no old business.

NEW BUSINESS

Policy Update, Programming and Outreach

Rohner moved to New Business and asked Stokes to introduce the proposed policy revision.

Stokes initially proposed presenting both policy updates for a first review, with consideration for approval at the following month's meeting. He noted that both are core operational policies.

Stokes explained that the proposed revisions to the Programming & Outreach Policy retain the core intent of the existing policy while updating it to reflect current Library programming, outreach, partnerships, and service delivery. The revisions clarify program-selection criteria, intellectual-freedom principles, non-endorsement provisions, and related matters. The draft also distinguishes Library-sponsored programs from programs offered by outside parties using Library meeting rooms.

He reviewed the packet materials, including the summary of proposed revisions, the existing policy, and the proposed updated policy. He read through the key changes listed in the summary and asked Board members to review the full document. He explained that the Board could defer action until the next meeting or proceed that evening if it wished to waive the proposed first reading.

Cobb asked whether the policies should remain sufficiently general to be useful for a longer period. Stokes responded that policies of this type are reviewed approximately every five years. Cobb also asked about language stating that the Library is not obligated to offer a program or speaking opportunity to every person who proposes one, citing as an example an author wishing to speak about a book. Stokes explained that the language clarifies that the Library is not obligated to enter into a partnership or sponsor every proposed program.

Stokes asked whether the Board preferred to defer action or adopt the policy that evening. Cobb and Rohner indicated that they were comfortable proceeding. Spriggs said she felt good about the policy, and McClay agreed.

Cobb moved to approve the revised Baker County Library District Collection Development Policy and Request for Review of Library Materials Form as presented, effective August 11, 2026, superseding the 2019 Materials Selection and Withdrawal Policy and the 2024 review form. Spriggs seconded the motion. There was no further discussion. The motion passed unanimously, with four votes in favor.

Policy Update, Collection Development and Materials Review

Rohner introduced the next agenda item, an additional policy update.

Stokes explained that this policy is more complex and that the current policy was adopted in 2019. He recommended replacing the District's 2019 Materials Selection & Withdrawal Policy with the proposed Collection Development Policy, coordinated with the revised Request for Review of Library Materials Form.

The proposed revisions modernize the policy to address digital resources, licensed content, streaming services, Library of Things collections, and other formats, and align it with current BCLD policies.

Stokes reviewed the **Key Policy Changes** list. He explained that the revision broadens the definition of library materials and resources; strengthens language concerning intellectual freedom, viewpoint neutrality, and parental responsibility; clarifies the responsibilities of the Board, Director, and staff; expands criteria for selection, retention, withdrawal, digital resources, and nontraditional collections; and establishes a consistent review process. The proposed policy provides that challenged materials will remain available during review and establishes eligibility requirements, filing limits, repeat-review provisions, decision timelines, and appeal procedures. Overall, the policy is substantially reorganized and modernized.

Stokes then reviewed the Proposed Revisions document, highlighting key points from each identified section, including the rationale for the update and the revision process. He said he had consulted policies from several other libraries. He discussed the substantially expanded purpose and scope; constitutional protections; American Library Association intellectual-freedom principles; individual access and parental responsibility; clearly assigned responsibility for collection decisions; and substantially expanded and modernized selection criteria. He invited questions, but none were offered at that point.

Continuing with Item 9, Stokes discussed digital resources and reviewed highlights from the remaining items. At Item 12, he described a recent request from a local author to add a book to the collection and his decision to decline the acquisition. At Item 15, he explained that certain items susceptible to theft, as well as rare or fragile materials, may be restricted to in-library use under internal procedures. At Item 16, Informal Concern and Formal Materials Review Process, he discussed the 30-day filing limit and the three-year restriction on repeat challenges. At Item 20, he noted that the Board's role in challenges is more clearly defined. At Item 21, he explained that recordkeeping and reporting may include reports to the State Library and other library-related entities.

Stokes concluded the summary of changes and invited questions or comments.

Spriggs observed that Diana Pearson does an excellent job evaluating collection performance and reviewing book series, and said that Pearson deserves recognition for the extensive research she conducts. Stokes agreed that Pearson contributes significant work to collection development.

Rohner asked about potential liability and the risk of litigation, including whether a challenge could proceed beyond the Board. Stokes discussed relevant legislation, State Library policies, and their application in libraries.

The Board discussed liability risk. Rohner commented that the proposed policy is lengthy and written in a style similar to a legal document, and asked whether it adequately addresses liability. Cobb agreed that the document is somewhat wordy and asked whether its purpose is to support staff or protect the Library. Stokes responded that it is a procedural document intended to provide clarity and that shorter, practical documents would be developed from the policy. McClay said she had no questions and observed that the policy is very specific and comprehensive. Rohner asked whether anyone wanted additional time before the Board acted. Hearing no comments, she requested a motion; action was delayed while Stokes reviewed the accompanying forms.

Stokes reviewed the six-page draft Request for Review of Library Materials form. He noted that the local newspaper had reported on the form and supported it as a positive procedure. He said he had made the form less confrontational, with a greater emphasis on principles and clarification for the user. Under the proposed process, only one item may be challenged within a 30-day period. He reviewed the form and its questions and provided clarification. He also reviewed the shorter Request for Review of Declined Acquisition form. Both forms are components of the collection-development process.

Spriggs asked how patrons would obtain the forms. Stokes said patrons generally receive them from him after the required conversation with the Director and that the forms are also available on the Library's website.

Rohner asked whether the revisions were based on policies used by other libraries. Stokes confirmed that he had researched other libraries' practices and believed this was an effective approach to updating the forms. Rohner asked about the basis for providing possible answers to some questions. The Board discussed the questions and how they would help identify the basis of an objection. Rohner emphasized that each question should have a purpose and asked whether Stokes understood that similar forms had been reviewed by legal counsel. Stokes said that was his understanding. He noted that multiple-choice questions could be perceived as supplying answers, but that they also help focus the review. The Board discussed the underlying policy and case law. Rohner said that, if counsel had approved the approach, the questions could help narrow the objection. She assumed challenges occur infrequently, and Stokes agreed. Rohner clarified that both the policy and forms would be approved by the Board and said she would be comfortable approving them if counsel had reviewed comparable forms used by other libraries.

Cobb agreed with Rohner and said that check boxes raised a question about whether the form was intended to categorize objections for tabulation or to narrow the scope of an objection. Rohner asked whether Stokes had anything further to review.

Stokes said he preferred to allow patrons, the press, community, and the Board time to review the materials and provide feedback. He suggested that amendments could be made and the documents considered for approval at the next meeting. Cobb asked whether a motion to postpone was needed, and Stokes said that would be appropriate.

Cobb moved to postpone consideration of the Collection Development Policy to allow time for public review and to place the policy on the agenda for the following month's meeting. McClay seconded the motion. The motion passed unanimously. The policy was scheduled for consideration at the September meeting.

REPORTS

Director's Report

Rohner moved to Reports, and Stokes presented the Director's Report.

Administration and Finance

- **Audit Services.** The request for proposals for audit services is open through August 31 and has been published on the Library's website. Approximately 200 licensed audit firms received direct email invitations to submit proposals. Stokes said he hoped to receive several responses.
- **Business Operations.** Hawes completed significant work associated with the new fiscal year, including administrative processing for six new hires, payroll updates related to wage increases, quarterly payroll reporting, and the annual workers' compensation report.
- **Volunteer Impact.** During the previous fiscal year, 87 volunteers contributed more than 4,255 hours to the District. Valued at minimum wage, their contributed time represented \$58,957.

Facilities, Energy, and Vehicles

- **Baker Branch.** The Library ordered new chairs for the adult and children's computer labs. Previous seating had consisted of used chairs and surplus furniture from Eastern Oregon University. Following complaints about comfort and support, Stokes purchased several molded-plastic chairs, which most users preferred. Based on feedback that some users prefer padded seating, he also ordered two padded chairs for the adult computer lab.
- Acoustic panels were installed in the children's Discovery Zone to reduce noise.
- Parking-lot restriping is planned for September or October and will include clearer markings for accessible parking spaces.
- **Energy Improvement Project.** A project is underway to improve the exterior northwest glass wall and provide better climate control. The project is intended to reduce solar heat gain and stabilize temperatures in two rooms along that wall. Plans have been submitted to Energy Trust of Oregon for approval, and the project may qualify for Energy Trust support.
- **Annual carpet cleaning** at the Baker Library is scheduled for Labor Day.

- Powder River Correctional Facility Adults in Custody (AICs) completed **landscape maintenance** and window cleaning on Friday, August 7, under the supervision of the Facilities Manager.

Branches and Bookmobile

- The Huntington Branch Library closed on an emergency basis from July 28 through August 1 because of **nearby wildfires**, a Level 3 evacuation order, and air-quality concerns. The closure continued until the evacuation level was reduced to Level 1.
- Sensors and batteries for the Haines accessible entrance door are being replaced to address operational problems.
- **Annual carpet cleaning** has been scheduled at all branch locations, including Richland for the first time.
- The bookmobile is in the shop for replacement of its two **rooftop air-conditioning units**. Facilities staff is also repairing a drawer and has remounted a second fire extinguisher.

Friends, Outreach, and Volunteers

- The Friends' **summer book sale** was successful, generating approximately \$2,800 in preliminary net proceeds.
- The Friends replaced the **microwave in the staff lounge**.
- The bookmobile participated in the **Miners Jubilee Parade**, driven by a staff member. The Friends supplied the candy distributed during the parade.
- Volunteers assist with many assignments, including cleaning public computers, digitizing microfilm, supporting interlibrary loan and holds, assisting with collection-development projects, and helping with facilities work. A new volunteer family is supporting the Spanish-English learning partnership.

Personnel and Training

- The District hired **Scott Kleeman** as its new IT employee. He has been training with Jim, reviewing the network, system workflows, and branch networks.
- The annual **All-Staff Training Day** is scheduled for August 20. The agenda includes fire-extinguisher training, staff introductions, guidance on missing-item status, staff-anniversary recognition, a team activity, cybersecurity trends, planned improvements, and a human-resources refresher.
- New Youth Services interns Avery and Susannah were hired to replace the departing intern, who graduated.
- A staff member is completing **Senior Planet training** this week. Vanessa McClarin will attend a conference in the fall and maintain the training requirements needed to teach adult computer-skills classes next year. Grant funding made this training possible.

Programs, Services, and Circulation

- **Library Adventure Program.** The Library offered Choose Your Own Adventure packets during the summer. More than 740 patrons participated, and the Library received very positive feedback from adults, children, and families.
- **Summer Reading Program.** The program concluded August 7. Because of poor air quality, the celebration was held indoors rather than at City Park. Reading logs and online Beanstack updates were accepted through August 12. Prize drawings were scheduled for August 13, followed by prize distribution to patrons.
- **Fine Forgiveness.** Patrons registered for the Summer Reading Program may receive \$1 in fine forgiveness for every 30 minutes of reading logged. The credit applies only to accrued fines and may not be used for lost or damaged materials. Stokes said the Library continues to seek ways to help patrons reduce fines and that this staff suggestion was well received.
- **Library Card Sign-Up Month.** During September, the Library will promote free replacement cards and a one-time waiver of outstanding fee balances. The Library has also purged more than 5,000 accounts that had been inactive for over two years.
- **Children's Technology.** Youth Programs staff are evaluating options to replace two AWE early-literacy computers purchased approximately 10 years ago that are no longer functioning reliably.
- **Ready to Read Grant.** Youth Programs staff are preparing the next application, due at the end of August. The District anticipates that it may receive nearly \$6,000 in additional funding next year to support expanded programming.

Collections and Technical Services

- **The collection contains 141,893 items.** During the previous month, staff cataloged and processed 588 items and repaired 204 items.

Safety and Security

- **Teen Vaping.** Vaping incidents involving teens increased during the summer. Approximately 12 teens had been congregating in the west-door alcove. Several exclusions were issued, and signs were posted to discourage the activity.
- **Vending-Machine Alcove.** The alcove was constructed for a vending machine that was removed some time ago. Its two active electrical outlets have been covered for safety. Because the area is outside the front-desk staff's line of sight, the Library is considering ways to repurpose it and discourage concealed activity.
- **Weather-Related Damage.** During a severe windstorm on July 23, a tree limb fell on a patron's vehicle in the Library parking lot. The incident was reported to the District's insurance agent. The insurer declined coverage, advising that the patron's automobile insurance should cover the damage.

- **Magazine Theft Incidents.** Two individuals were caught stealing magazines, and both were issued trespass notices. Magazines commonly disappear or have pages removed, and the Library continues efforts to discourage such conduct.
- **Restroom Safety.** A person recently tripped and fell in the men's restroom when the automatic timed lights turned off. The person was not injured, but a hand-towel dispenser was damaged. A night-light has been installed to provide illumination if the motion-sensor light turns off.

Technology and Workplace Operations

- **Main Server.** Maintenance was scheduled for August 8 after regular hours. Problems involving the server rack and related ground faults have been corrected.
- **Public Telephone.** Staff will be trained to restore telephone service using a simple reset procedure that resolves most service interruptions.
- **Staff Lounge Improvements.** A staff committee identified several possible improvements to the break room, including adding a small table, installing lockers or cubbies for personal belongings, deep-cleaning the floor, and completing several other improvements.

Financial Report

Hawes presented the Finance Report. Copies of the reports were distributed and displayed on the Zoom screen.

General Fund

- The General Fund received a tax turnover of \$7,655.27. Staff initially planned to await the County report to determine whether the funds belonged to the prior fiscal year because the online deposit referenced an end-of-year turnover. It was subsequently confirmed that the funds were the first turnover of the current fiscal year, not prior-year revenue.
- Personnel Services expenditures are on target with the budget, except that the monthly PERS payment had not yet posted. PERS was submitted the previous day, and the invoice was expected to post for payment on August 27.

Notable Materials and Services checks included:

- Ingram Library Services: \$8,099.53 for the monthly book order;
- Midwest Tape, also known as Hoopla: \$1,045.27 for monthly usage;
- Ed Adamson: \$96.00 reimbursement for a purchase from Ace Nursery;
- CivicPlus/Streamline: \$283.00 for the website subscription;
- Churchill Baker LLC: \$350.00 for adult-program studio use; and
- Catholic Purchasing: \$1,797.08 for eight chairs for the adult computer lab.

The August Visa statement was presented for review by a Board member. Notable charges included:

- East Oregonian subscriptions: \$182.00 for each of two branches and \$364.00 for the Baker Library;

- Western Stockmen's Journal subscription: \$779.88;
- FilterBuy: \$478.61 for replacement HVAC filters;
- Ubiquiti: four \$99.00 cybersecurity subscriptions for branch locations;
- GoDaddy: \$359.40 for the DNS renewal associated with website hosting; and
- Parade candy: \$513.80 for distribution from the bookmobile during the Miners Jubilee Parade. The Friends reimbursed the Library for this purchase.
- Facilities maintenance included a \$1,071.60 check to Valley Metal & Heating for HVAC maintenance and filter replacement at the Baker Library and branch locations because of heavy smoke.
- Two last-minute checks were added to avoid late fees for CenturyLink/Lumen branch telephone service: \$156.30 for Sumpter and \$99.81 for Huntington. Two checks were issued because the payments were sent to different addresses.

Other Funds

- Other Funds received \$903.45 in pool interest to be allocated among departments and \$541.12 in July proceeds from Amazon book sales.
- Two Visa payments were made for book-shipping costs: \$82.83 on July 15, 2026, and \$58.09 on August 14, 2026.

Capital Investment Fund

- The Capital Investment Fund had no activity.

Sage Fund

- The Sage Fund received one-half of the LSTA Courier Grant, totaling \$35,828.00, on July 21.
- Personal Services reflected one pay cycle for the fiscal year, paid August 1 for hours worked in July.
- Materials and Services included four checks to small courier vendors totaling \$1,973.24, plus two additional checks issued July 28 totaling \$1,164.00.
- Orbis Cascade, the largest courier vendor, is paid annually in July. This year's payment totaled \$59,283.00. The check was sent by Priority Mail with tracking to confirm delivery.

Review and Administrative Activity

- Approved Bills Reports, consisting of checking-activity printouts for each fund, were included with the check packets and August Visa documentation for Board members to initial while reviewing and signing checks.
- As noted in the Director's Report, July involved substantial paperwork for several new hires, entry of pay increases effective July 1, and annual and quarterly reporting for payroll taxes and workers' compensation insurance.

NEXT MEETING

The next regular Board meeting was scheduled for **September 15, 2026**, at 5:00 p.m. There was no further discussion.

ADJOURNMENT

Rohner adjourned the meeting at 6:38 p.m.

Respectfully submitted,

Perry Stokes
Secretary to the Board
PS/ch

Collection Development Policy

Selection, Access, Maintenance, and Review of Library Resources

DRAFT FOR BOARD CONSIDERATION

Current policy adopted

November 18, 2019

Proposed adoption

September 15, 2026

Supersedes

Materials Selection and Withdrawal Policy (2019)

1. PURPOSE

Baker County Library District (BCLD) develops and maintains collections that support the informational, educational, cultural, recreational, and lifelong learning needs and interests of the people of Baker County.

This policy establishes the principles and criteria used to select, provide access to, maintain, evaluate, and withdraw library materials and resources. It also establishes a fair and consistent process for responding to formal requests for review of resources in the collection and for review of decisions not to acquire suggested resources.

BCLD recognizes that no public library can acquire every available resource. The collection is developed through professional judgment, knowledge of the community, responsible stewardship of public funds, resource sharing, and application of the criteria in this policy.

2. SCOPE

For purposes of this policy, the collection includes materials and resources selected, licensed, leased, subscribed to, or otherwise made available by BCLD in physical, digital, and emerging formats.

BCLD primarily develops circulating collections for general public use and does not seek to maintain comprehensive academic, technical, or specialized research collections, except where resources serve an identified community or local-history need.

The collection may include books, periodicals, newspapers, audiobooks, music, films and other audiovisual works, e-books, downloadable and streaming media, databases, online resources, games, equipment and nontraditional circulating objects (often described as a Library of Things), and other formats appropriate to BCLD's mission.

Resources supplied through a consortium, cooperative agreement, interlibrary loan, or third-party platform may also be subject to the policies, licensing terms, availability decisions, and technical limitations of the supplying organization or vendor.

3. COLLECTION PHILOSOPHY AND INTELLECTUAL FREEDOM

BCLD supports intellectual freedom and the right of individuals to seek and receive information and ideas.

The collection, taken as a whole, should provide a broad range of subjects, experiences, perspectives, ideas, and forms of expression appropriate to a public library serving a diverse community. BCLD seeks resources responsive both to expressed community demand and to needs or interests that may not yet be widely expressed.

The presence of a material or resource in the collection does not constitute BCLD's endorsement of its content, accuracy, viewpoint, creator, publisher, or producer.

Resources will not be selected, excluded, restricted, relocated, or withdrawn solely because of partisan or doctrinal disapproval; controversy surrounding a work, subject, or creator; or the origin, identity, background, beliefs, or views of persons contributing to the work.

Individual resources may contain ideas, language, images, or viewpoints that some people find objectionable, offensive, inaccurate, disturbing, or inappropriate. The existence of such content does not by itself determine whether a work belongs in a public library collection. [Resources are evaluated in context and, for a discrete work, the work is evaluated as a whole, in relation to its intended audience and to the collection as a whole.](#)

Because meaningful intellectual freedom depends upon the availability of ideas as well as freedom from restrictions on their use, BCLD recognizes a particular responsibility to preserve opportunities for individuals to encounter works that others have sought to suppress or restrict and to make their own independent judgments about those works.

BCLD endorses the principles embodied in the American Library Association's **Library Bill of Rights**, **Freedom to Read Statement**, and **Freedom to View Statement**.

4. ACCESS AND INDIVIDUAL CHOICE

Reading, listening, viewing, and using library resources are matters of individual choice.

BCLD does not restrict one person's access to resources solely because another person or group objects to them. Resources will be organized, cataloged, labeled, and located according to generally applicable professional and operational considerations rather than for the purpose of endorsing, condemning, or suppressing a viewpoint.

Age or audience designations are intended to help users locate resources and do not constitute a determination that every item in an area is appropriate for every person of that age.

Parents and legal guardians are responsible for guiding the library use and selection choices of their own minor children. BCLD staff may assist families in locating resources consistent with their needs and preferences, but BCLD does not act in place of a parent or guardian in determining what an individual minor may read, view, hear, or borrow.

Access may be limited where reasonably required by law, licensing terms, safety requirements, preservation needs, equipment or technology requirements, circulation rules, or other viewpoint-neutral BCLD policies.

5. RESPONSIBILITY FOR COLLECTION DEVELOPMENT

The BCLD Board of Directors establishes collection policy. The Library Director is responsible for administration of this policy and for the development and management of the collection. The Director may delegate selection, evaluation, acquisition, maintenance, and withdrawal responsibilities to qualified staff.

Collection decisions are professional and administrative decisions made under this policy. Staff exercise professional judgment using appropriate knowledge of library resources, community needs, collection use, publishing and information resources, available technology, and responsible stewardship of District resources.

6. GENERAL SELECTION CRITERIA

No single criterion determines whether an item will be selected. An item need not satisfy every criterion. Depending on the type of resource, intended audience, subject, and format, staff may consider:

1. Current and anticipated community interests, needs, and demand.
2. Relationship to BCLD's mission, services, and collection objectives.
3. Relevance to the population and communities BCLD serves.
4. Contribution to the breadth and diversity of subjects, perspectives, experiences, creators, and forms of expression represented in the collection.
5. Intended audience and suitability of treatment for that audience.
6. Contemporary significance or enduring value.
7. Accuracy, authority, currency, or objectivity when those qualities are material to the purpose of the work.
8. Literary, artistic, educational, technical, recreational, or cultural value.
9. Originality or contribution of a distinctive, underrepresented, alternative, or controversial perspective.
10. Reputation, qualifications, or significance of the creator, publisher, producer, or source when relevant.
11. Professional reviews, awards, bibliographies, media attention, community recommendations, or other appropriate evaluation sources.
12. Use of similar resources and demonstrated or reasonably anticipated demand.
13. Relationship to resources already available through BCLD or partner libraries, including whether the item fills a gap, supplies an alternative treatment, or creates unnecessary duplication.

14. Local or regional significance, including relevance to Baker County, eastern Oregon, Oregon, and the Pacific Northwest.
15. Format, durability, usability, accessibility, and suitability for public library use.
16. Availability through vendors, resource-sharing partners, or other libraries.
17. Purchase price, licensing model, continuing costs, expected useful life, replacement cost, and overall value for the expenditure.
18. Physical space, technical infrastructure, staff capacity, and other operational requirements.
19. Documented censorship or attempted censorship of the work in the United States, particularly when selection would help preserve public access to challenged ideas or expression or promote public understanding of efforts to censor or restrict them.

Staff may use professional reviews and selection tools but are not required to locate a review of every selected item. Lack of a professional review does not by itself disqualify independently published, locally created, niche, emerging, or otherwise appropriate resource.

7. DIGITAL RESOURCES AND THIRD-PARTY PLATFORMS

Digital resources are selected under the general criteria in this policy. Because digital resources frequently involve licensing rather than permanent ownership, staff may additionally consider:

- ease of use and accessibility;
- compatibility with commonly used devices and operating systems;
- reliability and quality of the user interface;
- availability and quality of technical support;
- vendor privacy and data practices;
- authentication requirements;
- licensing terms and restrictions;
- simultaneous-use or lending limits;
- availability of titles within a vendor-supplied package;
- cost per use and ongoing subscription or platform costs; and
- BCLD's ability to preserve or continue access to content.

BCLD may subscribe to databases, platforms, or packages containing more individual resources than staff could reasonably select title by title. Selection of a platform does not constitute individual endorsement or evaluation of every item made available through it.

Availability of a digital title or service may change because of publisher, vendor, licensing, or technology decisions outside BCLD's control.

8. NONTRADITIONAL COLLECTIONS AND LIBRARY OF THINGS

Nontraditional circulating collections may be developed when they advance BCLD's mission and respond to community interests or needs.

In addition to the general selection criteria, staff may consider safety, durability, sanitation, storage, maintenance, replacement parts, consumable supplies, staff workload, training requirements,

technological obsolescence, insurance or liability considerations, and the anticipated frequency and manner of use.

BCLD may establish special borrowing rules or reasonable age, safety, or equipment requirements for particular items when warranted by their physical characteristics, use, or risk of loss or damage.

New collection concepts may be introduced as pilot projects. Staff may use circulation data, costs, operational experience, and community feedback to determine whether a pilot should be expanded, modified, continued, or discontinued.

9. LOCAL AND REGIONAL RESOURCES

BCLD recognizes a particular responsibility to provide access to resources concerning Baker County, eastern Oregon, and the region.

Local authors and creators are encouraged to suggest their works for consideration. Local authorship alone does not require inclusion. Resources by local creators are evaluated under the applicable selection criteria, with appropriate consideration given to local interest and significance.

Resources of enduring local historical value may receive different retention or preservation treatment than the general circulating collection.

10. PURCHASE SUGGESTIONS, REVIEW OF DECLINED ACQUISITION REQUESTS, AND RESOURCE SHARING

Baker County residents are encouraged to suggest titles, subjects, and resources for the collection. Suggestions are evaluated under the same criteria applied to other resources, and a request does not guarantee purchase.

When an item is outside the scope of BCLD's collection, demand is expected to be limited, or acquisition would not be an effective use of District resources, BCLD may seek to provide access through interlibrary loan, cooperative borrowing, digital resource sharing, referral, or other means.

An adult Baker County resident who is a registered BCLD cardholder may request review of a decision not to acquire a specific resource. The request must be submitted in writing to the Library Director within 30 calendar days after notice that the acquisition suggestion was declined and should identify the resource and explain why the requester believes its acquisition is consistent with the selection criteria in this policy.

The request must contain the information required by BCLD's Request for Review of Declined Acquisition form. If a submission is incomplete, BCLD will notify the requester of the missing information. If the deficiencies are not corrected within 30 calendar days after notice, the request will be closed without a decision on the merits.

The Director will review the acquisition decision under the applicable selection criteria and may consider relevant professional reviews, collection needs, demand, availability, cost, resource-sharing options, and other appropriate information. The Director will provide the requester with a written

decision and the reasons for it, normally within 30 calendar days after receipt of a complete request. If additional time is needed, BCLD will provide a written status update and estimated decision date.

A requester dissatisfied with the Director's decision may appeal to the BCLD Board of Directors by submitting a written appeal to the Library Director or Board Chair within 10 business days after the date of the Director's written decision. [The appeal must identify the provision of this policy that the requester believes was not followed or was applied incorrectly and explain the basis for that claim.](#)

The Board's review is to determine whether the acquisition decision reasonably complied with this policy, not to substitute individual trustees' personal preferences for professional collection judgment. The Board may affirm the decision, remand the matter for additional review, or direct another action consistent with this policy and applicable law. The Board's decision is final.

A resource that has completed this review process will not ordinarily be reconsidered for acquisition for 12 months unless availability, demand, the resource itself, the collection, or another material circumstance has changed.

11. GIFTS AND DONATIONS

Resources offered as gifts are governed by BCLD's **Gift and Donation Policy** and are evaluated under the applicable collection criteria in this policy. Acceptance of a donated item does not guarantee that the item will be added to or permanently retained in the collection.

12. COLLECTION MAINTENANCE, REPLACEMENT, AND WITHDRAWAL

Collection maintenance is an essential and continuing part of collection development. Staff regularly evaluate resources to keep collections useful, current, accessible, attractive, and responsive to community needs while preserving resources of continuing value.

Factors considered in retaining, replacing, relocating, or withdrawing resources may include:

1. use and current or anticipated demand;
2. accuracy, currency, and continued relevance;
3. physical condition;
4. duplication and number of copies;
5. availability of newer editions or formats;
6. continuing value or historical significance;
7. relationship to other resources on the subject;
8. availability through partner libraries, or resource sharing;
9. format obsolescence or loss of technical support;
10. expiration or alteration of digital licenses;
11. space and storage limitations;
12. cost of repair, replacement, maintenance, or continued access; and
13. the general selection criteria stated in this policy.

Resources are not withdrawn solely because they are controversial or because an individual or group objects to their content or viewpoint.

Withdrawal of an item does not necessarily mean BCLD no longer considers the work worthwhile. Items may be withdrawn because of condition, duplication, changing use, space, licensing, format, availability elsewhere, or other collection-management considerations.

Resources withdrawn from the collection will be disposed of in accordance with applicable District policies and law.

13. ORGANIZATION, CATALOGING, LABELING, AND PLACEMENT

BCLD organizes the collection to help people discover and use resources. Cataloging, shelving, audience designation, subject headings, genre labels, and other descriptive practices will be based on professional standards, intended audience, format, ease of use, space, and other viewpoint-neutral considerations.

A resource will not be labeled, sequestered, altered, or relocated solely to warn against or discourage access to its ideas or because of controversy concerning the resource or its creator.

BCLD may restrict circulation, require in-library or supervised use, or otherwise limit physical access to resources when reasonably necessary to preserve rare, fragile, difficult or impossible to replace, or unusually theft-prone items. Any such restriction will be based on preservation, security, or operational considerations and not on the content or viewpoint of the resource.

BCLD may update cataloging or placement when professional standards, collection practices, intended audience information, or operational needs reasonably warrant a change.

14. QUESTIONS AND INFORMAL CONCERNS ABOUT LIBRARY RESOURCES

BCLD welcomes questions about the collection. A person with a question or concern about an item may speak with library staff. Staff will listen to the concern, explain relevant collection practices or policies, and provide information about the resource when appropriate.

Before submitting a formal Request for Review, an eligible requester must discuss the concern with the Library Director or the Director's designee and allow BCLD an opportunity to respond informally. A written response or documentation of the informal discussion is not required before a formal request may be filed.

If the concern remains unresolved after that discussion, the requester may use BCLD's **Request for Review of Library Resource form**.

15. FORMAL REQUEST FOR REVIEW

An eligible requester is an adult resident of Baker County, Oregon who is a registered BCLD cardholder. Formal requests from groups or organizations will not be considered, although groups and organizations may communicate their views to BCLD through ordinary public-comment and correspondence channels.

A formal request must be signed and must identify one title, work, item, or discrete resource. A request concerning a broad service, program, display, policy, collection category, or general library practice rather than a particular resource will be directed to the BCLD policy or administrative review process applicable to that concern.

BCLD will consider no more than one formal Request for Review from the same individual in any 30-day period.

A resource that has been formally reviewed and retained will not ordinarily be reconsidered for three years after the final decision. The Director may accept a new request during that period when the request raises materially different grounds, the resource has materially changed, or another significant circumstance warrants a new review.

The Request for Review form identifies required information. If a submission is incomplete, BCLD will notify the requester of the missing information. The request will not proceed to substantive review until complete. If the deficiencies are not corrected within 30 calendar days after notice, the request will be closed without a decision on the merits.

Formal requests, the requester's name, correspondence concerning the request, and BCLD's decision may be public records. Contact information, library card information, circulation records, and other protected information will be handled in accordance with applicable law and the BCLD **Privacy and Confidentiality Policy**.

16. REVIEW PROCESS

Receipt of a formal request does not by itself justify removal, restriction, relocation, or recategorization of a resource. The resource will remain available under ordinary library rules while review is pending unless it becomes unavailable for reasons unrelated to the request or BCLD is required by law or court order to take other action.

The Library Director will acknowledge a complete request and arrange for its review. The Director may conduct the review with qualified staff or designate a **Resources Review Committee** of at least three qualified staff members. When appropriate, BCLD may seek professional advice from librarians outside the District, subject specialists, the State Library of Oregon, the Oregon Library Association Intellectual Freedom Committee, or other appropriate resources.

BCLD staff and a Resources Review Committee evaluate resources under District policy and do not independently resolve disputed questions of law. If disposition of a request or appeal materially depends on a disputed legal determination, BCLD will seek advice from legal counsel before taking action on that legal ground.

The review will consider:

- the complete Request for Review;
- the resource itself;
- the resource's intended audience and context;

- this Collection Development Policy and applicable selection criteria;
- professional reviews or other appropriate evaluation resources;
- relevant collection and use information; and
- other information reasonably necessary for an informed decision.

For a discrete work, reviewers will read, view, or listen to the work in its entirety when reasonably practicable and will evaluate the work as a whole rather than judging isolated passages, images, or excerpts outside their context.

Reviewers will set aside personal agreement or disagreement with the resource and determine whether its inclusion, classification, placement, or continued retention is consistent with this policy.

Following review, the Director may determine that the resource should:

1. remain in the collection without change;
2. be recataloged, relocated, or recategorized for a viewpoint-neutral professional or operational reason;
3. be withdrawn because it does not satisfy or no longer satisfies applicable collection criteria; or
4. receive another action consistent with this policy.

The Director will provide the requester with a written decision and the reasons for it, normally within 30 calendar days after receipt of a complete request. When the nature of the resource, the number of pending requests, staff availability, or another circumstance requires additional time, BCLD will provide a written status update and an estimated decision date.

The Director will keep the Board informed of formal requests and their disposition.

17. APPEAL TO THE BOARD OF DIRECTORS

A requester dissatisfied with the Director's final written decision may appeal to the BCLD Board of Directors by submitting a written appeal to the Library Director or Board Chair within 10 business days after the date of the decision.

The appeal must identify the specific provision of this policy or the review procedure that the requester believes was not followed or was applied incorrectly, and explain the basis for that claim. The purpose of the Board's review is to determine whether the review process and resulting decision reasonably complied with the policy established by the Board, not to substitute individual trustees' personal preferences for professional collection judgment.

The Director will provide the Board with the Request for Review, the resource or sufficient access to it, the administrative review record, the Director's decision, and the written appeal. The resource will remain available under ordinary library rules while an appeal is pending, subject to the same exceptions stated in Section 16.

The Board will consider the appeal at a regular or special meeting consistent with applicable public-meeting requirements. The Board may request additional information or professional review when needed. The Board may affirm the Director's decision, remand the matter for additional review, or

direct another action that is consistent with this policy and applicable law. The Board's decision on the appeal is final.

Public comment concerning a library resource does not by itself constitute a formal Request for Review or an appeal. A person seeking formal review must use the process established in this policy.

18. RECORDKEEPING AND REPORTING

BCLD will maintain administrative records of formal resource reviews, declined acquisition reviews, and their disposition consistent with applicable records-retention and public-records requirements.

The Director may report intellectual-freedom challenges and outcomes, with appropriate protection of confidential information, to the State Library of Oregon's Oregon Intellectual Freedom Clearinghouse, the Oregon Library Association, the American Library Association Office for Intellectual Freedom, or similar professional organizations.

19. RELATED BCLD POLICIES

This policy should be read together with other applicable BCLD policies, including:

- Administrative Review of Library Services;
- Gift and Donation Policy;
- Library Displays Policy;
- Privacy and Confidentiality Policy;
- Public Complaint / Patron Grievance Policy and Procedure (for matters outside the review processes established by this policy);
- Technology Use Policy; and
- applicable circulation, resource-sharing, and records-management policies.

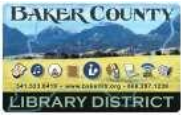
If a concern falls principally within another BCLD policy, the Director may direct the matter to the procedure established by that policy.

20. POLICY REVIEW

The Library Director will periodically review this policy and associated administrative procedures for consistency with current law, professional standards, technology, collection practices, and community needs.

The Board will formally review this policy at least once every four years and more frequently when circumstances warrant.

Policy history: Origin 8/2007; revised 3/2009, 11/2016, 11/2019; proposed revision 9/2026.



Request for Review of Library Resource

DRAFT - PROPOSED REVISION

ELIGIBILITY AND FILING REQUIREMENTS

A formal request may be submitted by an adult resident of Baker County, Oregon who is a registered BCLD cardholder. The following rules apply:

- Before filing, discuss the concern with the Library Director or designee and allow BCLD an opportunity to respond informally.
- Use one form for one title, work, item, or discrete resource.
- BCLD will consider no more than one formal Request for Review from the same person in any 30-day period.
- A resource formally reviewed and retained will not ordinarily be reconsidered for three years, except for materially different grounds, a materially changed resource, or another significant circumstance accepted by the Director.
- Required information must be complete. If BCLD identifies missing information, you will have 30 calendar days after notice to correct it before the request is closed without a decision on the merits.
- The resource will remain available under ordinary library rules during review unless it becomes unavailable for unrelated reasons or BCLD is required by law or court order to take other action.

REQUESTER INFORMATION

Name *	Library card number *
Street address *	City / State / ZIP *
Telephone	Email
Preferred contact method	Other contact information (optional)

* Required. Library card and contact information will be handled in accordance with applicable law and BCLD privacy policy.

RESOURCE INFORMATION

Title / name of resource *

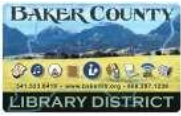
Author / creator / producer (if applicable)

FORMAT (check all that apply): ☐ Physical ☐ Digital ☐ Book / Audiobook ☐ Periodical / News ☐ Video / Film

☐ Music / Audio ☐ Database / Online Resource ☐ Game ☐ Library of Things / Nontraditional ☐ Other: _____

REQUIRED ACKNOWLEDGMENTS

- ☐ I have received or reviewed the BCLD Collection Development Policy and understand that this request will be evaluated under that policy.
- ☐ I have discussed this concern with the Library Director or designee, and the concern remains unresolved.
- ☐ I understand that this signed request, my name, related correspondence, and the Library's decision may be public records. Contact information, library card information, circulation records, and other protected information will be handled in accordance with applicable law and BCLD Privacy and Confidentiality Policy.
- ☐ I understand that BCLD will evaluate the resource in context under the Collection Development Policy and applicable law and, for a discrete work, will evaluate the work as a whole rather than solely on isolated passages, images, excerpts, or features.



YOUR REQUEST - PAGE 1 OF 4

Please answer every question marked **REQUIRED**. Questions marked **REQUIRED IF APPLICABLE** must be answered when that issue is part of your request. Attach additional pages or supporting materials if needed.

1. How did this resource come to your attention? REQUIRED

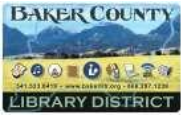
2. How much of the resource did you personally read, view, listen to, use, or otherwise examine? REQUIRED

IF LESS than the entire resource, identify the portions examined (for example: chapters/pages, timestamps, tracks, entries, features, or other sections).

☐ Entire resource ☐ Less than the entire resource

3. Tell us about your concerns with this resource. REQUIRED

Include page numbers, passages, timestamps, images, entries, features, or other identifying information when possible.



YOUR REQUEST - PAGE 2 OF 4

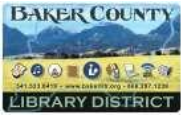
4. What action are you asking BCLD to take, and why? REQUIRED

- ☐ Relocate or change audience designation ☐ Change cataloging / classification
- ☐ Restrict access ☐ Withdraw
- ☐ Other: _____

If you are requesting restriction, relocation, or withdrawal, explain why a less restrictive alternative would not adequately address your concern, and why the requested action is justified despite its effect on other library users' desire for continued access and individual choice.

5. What specific harm or adverse effect do you believe results, or could reasonably result, from the way the resource is currently available from the library? REQUIRED IF APPLICABLE

Please list who, if anyone, has been affected and provide evidence to support your concern.



YOUR REQUEST - PAGE 3 OF 4

6. Do you contend that this resource fails to comply with the BCLD Collection Development Policy, or another applicable BCLD policy? **REQUIRED**

☐ Yes ☐ No ☐ Unsure

***IF YES,** identify the applicable section or criterion when possible and explain how it applies.*

7. Does your request rely in whole or in part on a claim that this resource, or BCLD's provision of access to it, is unlawful or legally restricted? **REQUIRED**

☐ Yes ☐ No ☐ Unsure

***IF YES OR UNSURE:** Describe the legal concern in your own words. Identify the specific content, feature, or portion of the resource involved and any law, court decision, legal authority, or other information you would like BCLD to consider. You are not required to identify or interpret a particular legal standard.*

YOUR REQUEST - PAGE 4 OF 4

8. Considering the resource in its full context—and, when it is a self-contained work, the work as a whole—what do you understand to be its overall purpose, function, theme, or message? **REQUIRED**

9. What positive qualities can you imagine this resource might have for other library users?

REQUIRED

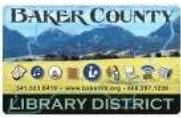
Consider potential literary, artistic, educational, political, scientific, cultural, historical, recreational, practical, or other value or utility.

10. Are you aware of notable reviews, critiques, awards, legal authorities, scholarly sources, or other information you would like BCLD to consider? Please identify or attach them.

OPTIONAL

11. Are there alternative resources concerning the same subject, perspective, or issue you recommend that BCLD add or consider? **OPTIONAL**

This information may help BCLD consider the breadth of subjects and perspectives represented in the collection.



WHAT HAPPENS AFTER SUBMISSION

- 1** **Completeness check:** BCLD will confirm that the form contains the required information and that the requester is eligible under the Collection Development Policy.
- 2** **Professional review:** The Library Director will arrange for review and may conduct the review with qualified staff or designate a Resource Review Committee. The resource will be evaluated as a whole, in context, and under the applicable Collection Development Policy criteria.
- 3** **Written decision:** The Director will normally issue a written decision within 30 calendar days after receiving a complete request. If more time is needed, BCLD will provide a status update and estimated decision date.
- 4** **Appeal:** A requester may appeal the Director's final written decision to the BCLD Board of Directors within 10 business days after the written decision date. The written appeal must identify the specific policy or procedural provision believed not to have been followed or correctly applied, and explain the basis for that claim.
- 5** **Board review:** The Board reviews whether the process and decision reasonably complied with the Collection Development Policy. The Board may affirm the decision, remand for additional review, or direct another action consistent with policy and applicable law. The Board's appeal decision is final.

PUBLIC RECORDS AND PRIVACY NOTICE

Formal and informal communications challenging or requesting review of library resources may be part of BCLD's public administrative record and may be subject to disclosure. BCLD will handle contact information, library account information, circulation records, and other protected information in accordance with applicable law and the BCLD Privacy and Confidentiality Policy. BCLD may report challenge information and outcomes to professional organizations; personal contact information will not be included unless disclosure is required by law.

CERTIFICATION AND SIGNATURE

By signing, I certify that I am the requester identified above and that the information provided in this request is true and complete to the best of my knowledge. I understand that anonymous or unsigned requests will not be processed as formal Requests for Review.

Signature (Original)* _____ **REQUIRED**

Date * _____ **REQUIRED**

LIBRARY USE ONLY

Date received _____	Received by _____
Eligibility verified _____	Date complete _____
Director decision date _____	Appeal deadline _____
Notes	

Summary of Changes — Resources Review Request Form

Version 7 to Version 8

Version 8 renames the form and replaces references to “**materials**” with “**resources**” to reflect the wider range of library items and services that may be reviewed. It also simplifies the questions while retaining the information needed for a fair and useful review.

The basic process remains unchanged. A requester must be an adult Baker County resident and BCLD cardholder, first discuss the concern with the Director or designee, submit one resource per request, and provide all required information. Filing limits, the three-year repeat-review provision, and continued availability of the resource during review are also retained.

1. Shorter Questionnaire

The form is reduced from **15 questions to 11**. Several overlapping or highly legalistic questions are removed or combined.

Reason: The shorter form is easier to complete and focuses on information directly useful to the review.

2. Requested Action and Less Restrictive Alternatives

The question asking what action the requester wants BCLD to take is moved earlier in the form. If restriction, relocation, or withdrawal is requested, the requester is asked why a less restrictive alternative would not address the concern and to consider the effect on other users’ continued access and individual choice.

Reason: This connects the concern directly to the remedy being requested and reflects the Collection Development Policy.

3. Harm Question Simplified

Version 7 asked who had been or would be “**directly harmed.**” Version 8 instead asks what specific harm or adverse effect results, or could reasonably result, from the resource’s availability and what evidence supports the concern. The question is now **Required if Applicable** rather than required in every case.

Reason: The revised language asks for specific facts without suggesting that the requester must meet a legal definition of injury.

4. Policy Question Broadened

The form now asks whether the resource conflicts with the **Collection Development Policy or another applicable BCLD policy**, rather than limiting the question to the Collection Development Policy alone.

Reason: Some concerns may involve another District policy, such as technology use, circulation, privacy, or displays.

5. Legal Questions Simplified

Version 7 asked the requester to select among legal categories such as obscenity, incitement, threats, fraud, defamation, and other forms of allegedly unprotected speech. Version 8 replaces this checklist with one question asking whether the request relies on a claim that the resource—or BCLD’s provision of access to it—is unlawful or legally restricted. The requester may describe the concern and provide supporting authority but is not required to interpret a legal standard.

The three separate questions applying elements of the legal obscenity test are also removed.

Reason: The form should gather the facts and legal concerns raised by a requester without asking patrons, library staff, or a review committee to make specialized legal judgments.

6. Whole-Work and Context Review Clarified

Version 8 clarifies that all resources should be considered in context and that a self-contained work should also be considered as a whole.

Reason: BCLD collections include not only books and films but also databases, online resources, games, equipment, and Library of Things items. Not every resource is a discrete work.

7. Other Users’ Interests Incorporated More Efficiently

Version 7 separately asked why continued access should be limited for other Baker County taxpayers. Version 8 removes that standalone question and incorporates the issue into the requested-action question.

The form still asks the requester to consider the resource’s possible value to other users.

Reason: This preserves an important consideration while reducing repetition and making the form less confrontational.

8. Alternative Resources Question Clarified

The form continues to ask whether the requester recommends other resources on the same subject, perspective, or issue. Version 8 explains that this information may help BCLD consider the breadth of subjects and perspectives in the collection.

Reason: The explanation makes clear why the question is relevant without suggesting that every challenged resource requires an opposing or replacement title.

9. Appeal Language Strengthened

Version 8 requires an appeal to identify the policy or procedure believed to have been incorrectly applied **and explain the basis for that claim**.

Reason: This gives the Board a clearer statement of the alleged error when reviewing an appeal.

10. Administrative Section Simplified

The **Library Use Only** section retains the key tracking dates but replaces separate prior-review and disposition fields with a more flexible Notes area.

Overall Effect

Version 8 is a **simplification and clarification**, not a major change in the review process. Eligibility, filing limits, public-records provisions, continued availability during review, professional review, decision timelines, and Board appeal remain substantially the same.

The main change is that the form now focuses more directly on the **concern, requested action, supporting evidence, applicable District policy, any claimed legal issue, the resource in context, and its possible value to other users**. It also more clearly separates professional library review from legal determinations.

Resources Review Request Form - Summary of Changes

2024 Request for Review of Library Materials compared with proposed Version 8

Overview. The newly revised proposal (version 8) broadens the form from traditional "materials" to "resources," simplifies filing and review questions, and aligns the form with the proposed Collection Development Policy. The core eligibility standard remains, while the form now gives clearer guidance on the review process, requested remedies, policy issues, legal claims, and Board appeal.

1. Broader terminology: "Materials" becomes "Resources"

Version 8 renames the form and generally replaces references to "materials" with "resources." It also expands format choices to include digital resources, databases, online services, games, Library of Things items, and other nontraditional formats.

Reason: The review process should cover the full range of resources BCLD now provides, not only traditional print and media collections.

2. Core eligibility requirements are retained

Both forms require the requester to be an adult Baker County resident and a registered BCLD cardholder. Version 8 places the eligibility and filing rules at the beginning so a requester can determine eligibility before completing the form.

Reason: The principal eligibility standard adopted in 2024 remains intact while the presentation is clearer.

3. Informal consultation is simplified

The 2024 form required the concern to be presented to the Library Director for discussion and written response, with documentation attached to the request. Version 8 still requires an informal discussion with the Director or designee, but no separate written response or attachment is required.

Reason: This preserves an opportunity for informal resolution without creating unnecessary paperwork or the appearance of two formal Director decisions.

4. Filing limits are clarified

Version 8 retains the limit of one formal request per person in a 30-day period and the general three-year waiting period before reconsidering a retained resource. It also states exceptions for materially different grounds, a materially changed resource, or another significant circumstance. Incomplete requests may be corrected within 30 days before being closed without a decision on the merits.

Reason: The rules are more precise and are stated consistently with the proposed Collection Development Policy.

5. The discretionary fee provision is removed

The 2024 form stated that BCLD might charge a fee after more than three requests within twelve months but did not specify the fee or method of calculation. Version 8 removes that provision.

Reason: The one-request-per-30-days limit provides a clear administrative mechanism for managing repeated submissions without an undefined fee.

6. Continued access during review is expressly protected

Version 8 states that a challenged resource ordinarily remains available under normal library rules while review is pending, unless it becomes unavailable for an unrelated reason or BCLD is required by law or court order to act otherwise.

Reason: Filing a complaint alone should not determine the outcome of the review or automatically restrict access.

7. Resource information is broader and more flexible

Version 8 uses fields such as "title/name of resource" and "author/creator/producer" and accommodates physical, digital, database, online, game, and Library of Things resources.

Reason: The form is usable across contemporary BCLD collections rather than being centered on books and traditional media.

8. The questionnaire is shorter and more focused

The 2024 form contained 14 numbered questions and treated all questions as required. Version 8 uses 11 questions and distinguishes among Required, Required if Applicable, and Optional questions. The revised questions focus on the resource, portions examined, specific concern, requested action, possible adverse effects, applicable policy, any legal claim, context, possible value to other users, supporting information, and alternative resources.

Reason: The form gathers information directly useful to the review while reducing unnecessary or repetitive questions.

9. The requested action is made more specific

Version 8 provides clear options such as relocation or audience change, cataloging or classification change, access restriction, withdrawal, or another action. When restriction, relocation, or withdrawal is requested, the requester is asked why a less restrictive alternative would not address the concern and to consider the effect on other users' continued access and individual choice.

Reason: Reviewers receive a clearer statement of the remedy requested and why that degree of action is considered necessary.

10. The harm question is broadened and made less legalistic

The 2024 form asked whether the material directly caused the requester or a family member personal or financial harm and required a causal connection. Version 8 instead asks for any specific harm or adverse effect believed to result, or reasonably be capable of resulting, from the way the resource is provided, who may be affected, and supporting evidence. The question is required only when applicable.

Reason: The revised wording seeks concrete facts without implying that the requester must satisfy a formal legal definition of injury.

11. Policy and legal concerns are separated

The 2024 form combined claims of policy violations and violations of federal, state, or local law. Version 8 asks separately whether the resource conflicts with the Collection Development Policy or another applicable BCLD policy and whether the request relies on a claim that the resource, or BCLD's provision of access, is unlawful or legally restricted. A requester may provide legal authority but is not required to interpret a legal standard.

Reason: This documents any legal allegation without requiring either the requester or library staff to act as legal experts.

12. Whole-resource and context review is strengthened

Version 8 asks the requester to consider the resource in its full context and, for a self-contained work, the work as a whole. It also asks what positive literary, artistic, educational, scientific, cultural, recreational, practical, or other value the resource might have for other users.

Reason: This supports review of the complete resource rather than isolated passages or features and recognizes that different users may find different value in the same resource.

13. Philosophical agree/disagree questions are removed

The 2024 form asked requesters to agree or disagree with propositions about intellectual freedom, young people's access to books, individual choice, parental authority, and representation in the collection. Version 8 removes those questions.

Reason: BCLD's intellectual-freedom and access principles are established by Board policy and should be applied by reviewers rather than used as an agreement test for a complainant.

14. Other users' interests are addressed more neutrally

The 2024 form asked why an adult patron who disagreed with the requester should accept the requested action. Version 8 does not ask that as a separate adversarial question. Instead, the requested-action question asks the requester to consider the effect of a proposed restriction on other users' continued access and individual choice.

Reason: The revised approach preserves the balancing issue while reducing confrontation and repetition.

15. Alternative-resource language is neutralized

The 2024 form asked for alternate material representing the same viewpoint "in a better way." Version 8 simply asks whether the requester recommends other resources on the same subject, perspective, or issue.

Reason: The newer wording gathers useful collection-development information without presuming another resource is objectively better.

16. The premature hearing election is removed

The 2024 form asked the requester, at the initial filing stage, whether they would testify at a hearing. Version 8 removes that election.

Reason: A Board appeal or public meeting occurs only after administrative review and the Director's decision, so hearing participation can be addressed later if an appeal is filed.

17. Public-records and privacy language is more precise

Version 8 replaces differing statements in the 2024 form with a single approach: the signed request, requester name, related correspondence, and decision may be public records, while contact information, library-account information, circulation records, and other protected information are handled under applicable law and BCLD's Privacy and Confidentiality Policy.

Reason: The notice is clearer and more consistent about what may be public and what information receives statutory or policy protection.

18. The review and appeal process is explained on the form

Version 8 explains the steps after submission: completeness check, professional review, written Director decision, a 10-business-day Board appeal period, and Board review. It also establishes a normal 30-

calendar-day target for the Director's written decision and provides for a status update if more time is needed.

Reason: Requesters can see the full administrative process, expected timing, and appeal path before filing.

Overall Effect

Proposed Version 8 is broader in scope but more focused in substance than the 2024 form. It emphasizes the specific resource and concern, the remedy requested, less restrictive alternatives, evidence of adverse effects, applicable BCLD policy, any claimed legal issue, review of the resource in context, possible value to other users, and a transparent administrative decision and appeal process.

The result is intended to be **easier to complete and administer consistently, more closely aligned with the proposed Collection Development Policy, and less likely to place either requesters or library staff in the role of resolving specialized legal questions.**

Summary of Changes — ~~Materials~~ Resources Review Request Form

Version 7 to Version 8

Version 8 renames the form and replaces references to “materials” with “resources” to better reflect the broader range of items, formats, and services that may be subject to review. It retains the basic administrative framework previously presented to the Board but substantially simplifies the **substantive questions asked of a requester**. The principal objective is to obtain the facts, requested remedy, evidence, policy basis, and any claimed legal concern needed for a meaningful review without leading the witness or asking either the requester or library staff to make specialized legal determinations.

The eligibility and filing requirements are essentially unchanged: the requester must be an adult Baker County resident and BCLD cardholder, first discuss the concern informally with the Director or designee, submit one resource per request, observe the 30-day filing limit, and complete required information. The three-year repeat-review provision and presumption that the resource remains available during review are also retained.

1. **The questionnaire is shortened from 15 questions to 11.** Version 8 eliminates several overlapping or highly legalistic questions while retaining the principal information needed to assess a complaint. The result is intended to be easier for a patron to complete and more focused on facts relevant to application of District policy. Version 7 extended through Question 15; Version 8 concludes with Question 11.
2. **The requested-action question is moved earlier and strengthened.** Version 7 first asked the requester to explain the work’s overall purpose and possible value to others before stating what action was requested. Version 8 moves the requested remedy to Question 4, immediately after identification of the concern. It also replaces the example involving parental account restrictions with a broader requirement to explain why a **less restrictive alternative** would not adequately address the concern and why the requested action is justified despite its effect on other users’ continued access and individual choice.

Reason: This more directly connects the complaint to the remedy being sought and reflects the Collection Development Policy’s emphasis on considering less restrictive alternatives and the effect of restrictions on other library users.

3. **The harm question is made less legalistic and more fact-focused.** Version 7 asked who “has been, or would be, directly harmed” and required the requester to cite specific harm and evidence. Version 8 instead asks what specific harm or adverse effect results, or could reasonably result, from the way the resource is currently available, who has been affected, and what evidence supports the concern. It is also changed from universally **REQUIRED** to **REQUIRED IF APPLICABLE**.

Reason: “Direct harm” can sound like a legal standing or causation standard. The revised wording still requires a concrete explanation and supporting evidence but does not imply that the requester must satisfy a judicial definition of injury.

4. **The policy-compliance question is broadened appropriately.** Version 7 asked only whether the resource violated the Collection Development Policy. Version 8 asks whether the resource fails to comply with the Collection Development Policy **or another applicable BCLD policy**.

Reason: A particular concern may implicate another District policy—for example, technology use, circulation, privacy, displays, or another administrative policy—even though the Materials Review process begins under the Collection Development Policy.

5. **The detailed constitutional-law checklist is removed.** Version 7 asked the requester to determine whether a resource was constitutionally unprotected and select among legal categories such as incitement, true threats, obscenity, fraud, fighting words, defamation, or speech integral to criminal conduct. Version 8 replaces that checklist with one broader question asking whether the request depends on a claim that the resource—or BCLD’s provision of access to it—is unlawful or legally restricted. The requester may identify relevant content and legal authority but is expressly told that they are **not required to identify or interpret a particular legal standard**.

Reason: The revised approach still identifies whether a legal allegation forms part of the complaint and gathers the facts and authorities supporting it, but avoids placing library staff or a delegated Materials Review Committee in the position of appearing to adjudicate specialized constitutional-law questions for which they may not be legally qualified.

6. **The three detailed obscenity questions are eliminated.** Version 7 separately asked whether the work appealed to the prurient interest, depicted sexual conduct in a patently offensive manner, and lacked serious literary, artistic, political, or scientific value. Those questions do not appear in Version 8.

Reason: Those questions effectively required the requester—and ultimately library reviewers—to work through elements of a legal obscenity test. Version 8 instead asks the requester to describe any legal concern and provide the underlying facts or authorities, leaving any necessary legal determination to an appropriately qualified source rather than converting the library review form into a legal-analysis worksheet.

7. **Whole-work/context analysis is retained but made applicable to a broader range of resources.** Version 7 asked, “In view of the work as a whole,” what the requester understood its overall purpose, function, theme, or message to be. Version 8 revises this to:

“Considering the resource in its full context—and, when it is a self-contained work, the work as a whole—what do you understand to be its overall purpose, function, theme, or message?”

Reason: The revised form covers not only books and films but also databases, online resources, games, equipment, and Library of Things items. Not every resource constitutes a discrete “work,” so the wording now distinguishes contextual review of all resources from whole-work review of self-contained works.

8. **Consideration of other patrons’ access is retained but no longer asked as a separate adversarial question.** Version 7 separately asked why other Baker County taxpayers who wanted continued access should have that service limited or denied. Version 8 removes that standalone question and incorporates the concept into Question 4, which asks the requester to justify the proposed restriction despite its effect on other users’ continued access and individual choice.

Reason: The principle remains important, but asking it separately had become partly redundant after the requested-action question was strengthened. Combining the concepts makes the form shorter and less confrontational without losing the balancing information useful to reviewers.

9. **Questions about the resource’s value to others are retained.** Version 8 continues to ask what positive qualities the requester can imagine the resource having for other users and identifies literary, artistic, educational, political, scientific, cultural, historical, recreational, practical, and other possible value or utility.

Reason: This encourages consideration of the resource from more than the requester’s personal perspective and supports the policy principle that collection decisions consider a work or resource in context and in relation to the broader collection.

10. **The alternative-resource question is clarified.** Version 7 simply asked whether the requester recommended other resources concerning the same subject, perspective, or issue. Version 8 retains the question but adds that the information may help BCLD consider the **breadth of subjects and perspectives represented in the collection**.

Reason: The added explanation clarifies why BCLD is asking the question without suggesting that every challenged resource must be replaced by an opposing work or that the Library has an obligation to provide equal numbers of materials representing every viewpoint.

11. **The Board appeal language is made more complete.** Both versions require an appeal to identify the policy or procedural provision believed not to have been followed or properly applied. Version 8 adds that the requester must also **“explain the basis for that claim.”**

Reason: This better aligns the form with the proposed Collection Development Policy and gives the Board a clearer statement of the alleged procedural or policy error rather than merely a citation to a policy section.

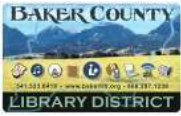
12. **The Library Use Only section is simplified.** Version 7 included fields for a prior review date and a disposition/notes field. Version 8 retains the core tracking fields—date received, eligibility verification, date complete, Director decision date, and appeal deadline—but consolidates the remaining space into a general **Notes** area.

Reason: This provides more flexible administrative space while retaining the dates needed to document compliance with the review and appeal timelines.

Overall Effect

Version 8 is best characterized as a **targeted simplification and clarification of the version previously presented to the Board rather than a change in the underlying review philosophy or procedure**. The eligibility requirements, filing limits, public-records notice, continued availability of materials during review, professional review process, written decision timeline, and Board appeal structure remain substantially unchanged.

The principal substantive change is that Version 8 shifts the form away from asking patrons and library reviewers to make technical constitutional or obscenity-law determinations. It instead concentrates on the **specific concern, requested remedy, less restrictive alternatives, evidence of harm or adverse effect, applicable District policy, any claimed legal issue, the resource in context, its possible value to other users, and relevant supporting information**. This should produce a useful administrative record while keeping professional collection review distinct from legal adjudication.



Request for Review of Declined Acquisition

DRAFT - PROPOSED NEW FORM

Use this form to request review of a BCLD decision not to acquire a specific title, work, item, or resource that you previously suggested for the collection.

ELIGIBILITY AND FILING REQUIREMENTS

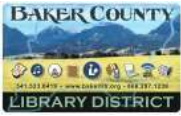
A formal request may be submitted by an adult resident of Baker County, Oregon who is a registered BCLD cardholder. The following rules apply:

- Use one form for one title, work, item, or discrete resource.
- Completion of this form does not guarantee acquisition; the resource will be evaluated under the BCLD Collection Development Policy
- A resource that has completed this review process will not ordinarily be reconsidered for acquisition for 12 months unless availability, demand, the resource itself, the collection, or another material circumstance has changed.
- Required information must be complete. If BCLD identifies missing information, you will have 30 calendar days after notice to correct it before the request is closed without a decision on the merits.

REQUESTER INFORMATION

Name *	Library card number *
Street address *	City / State / ZIP *
Telephone	Email
Preferred contact method	Other contact information (optional)

** Required. Library card and contact information will be handled in accordance with applicable law and BCLD privacy policy.*



RESOURCE REQUESTED

Title / name of resource *

Author / creator / producer (if applicable)

FORMAT (check all that apply): ☐ Physical ☐ Digital ☐ Book / Audiobook ☐ Periodical / News

☐ Video / Film ☐ Music / Audio ☐ Database / Online Resource ☐ Game

☐ Library of Things / Nontraditional ☐ Other: _____

Date originally suggested * _____ Date decline notice received * _____

REQUIRED ACKNOWLEDGMENTS

☐ I have received or reviewed the BCLD Collection Development Policy and understand that this request will be evaluated under that policy.

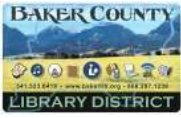
☐ I understand that this signed request, my name, related correspondence, and the Library's decision may be public records. Contact information, library card information, circulation records, and other protected information will be handled in accordance with applicable law and BCLD privacy policy.

BASIS FOR REVIEW

Please answer every question marked REQUIRED. Attach additional pages if needed.

1. Why do you believe this resource should be added to the BCLD collection? REQUIRED

You may address community interest or informational, educational, cultural, recreational, local, historical, or other value.



2. Which selection criteria or other provisions of the Collection Development Policy do you believe support acquisition? REQUIRED

3. What other information would you like BCLD to consider? OPTIONAL

Examples may include professional reviews, awards, local or regional significance, demonstrated community interest, limited availability elsewhere, or documented censorship or attempted censorship of the work.



WHAT HAPPENS AFTER SUBMISSION

- 1 Completeness check:** BCLD will confirm that the form contains the required information and that the requester is eligible under the Collection Development Policy.
- 2 Director review:** The Library Director will review the acquisition decision under the applicable Collection Development Policy criteria and may consult qualified staff or other appropriate resources. The Director may consider professional reviews, collection needs, demand, availability, cost, resource-sharing options, and other relevant information.
- 3 Written decision:** The Director will normally issue a written decision within 30 calendar days after receiving a complete request. If more time is needed, BCLD will provide a status update and estimated decision date.
- 4 Appeal:** A requester may appeal the Director's final written decision to the BCLD Board of Directors within 10 business days. The written appeal must identify the specific policy or procedural provision believed not to have been followed or correctly applied.
- 5 Board review:** The Board reviews whether the process and decision reasonably complied with the Collection Development Policy. The Board may affirm the decision, remand for additional review, or direct another action consistent with policy and applicable law. The Board's appeal decision is final.

PUBLIC RECORDS AND PRIVACY NOTICE

Formal and informal communications challenging or requesting review of library materials may be part of BCLD's public administrative record and may be subject to disclosure. BCLD will handle contact information, library account information, circulation records, and other protected information in accordance with applicable law and the BCLD Privacy and Confidentiality Policy.

CERTIFICATION AND SIGNATURE

By signing, I certify that I am the requester identified above and that the information provided in this request is true and complete to the best of my knowledge. I understand that anonymous or unsigned requests will not be processed as formal Requests for Review.

Signature * _____

Date * _____

LIBRARY USE ONLY



Date received _____	Received by _____
Eligibility verified _____	Date complete _____
Director decision date _____	Appeal deadline _____
Prior review date, if any _____	Disposition / notes ☐ Acquire ☐ Decline ☐ Alternative access ☐ Other
Appeal filed: ☐ No ☐ Yes	Appeal date: _____

Audit Proposal Assessment and Award Recommendation

Baker County Library District | Fiscal Year Ending June 30 2026

Recommendation

Award the audit services contract to **Zwygart John and Associates PLLC**, subject to satisfactory reference checks.

According to the evaluation criterion, no significant winner is revealed in the overall scoring total. With a margin of 0.5 points in favor of Zwygart, the assessment is a statistical tie.

The Pauly Rogers proposal provides strong evidence of Oregon special district and library audit experience, staffing depth, engagement controls, and a detailed governmental audit methodology.

But Zwygart is recommended as the most advantageous proposal because:

- Its three-year fee is \$19,450 lower—a reduction of approximately 38%.
- It received the maximum fee score. It has substantial municipal audit experience.
- It proposes timely filing.
- The District determines that its qualifications are sufficient for an audit of BCLD’s size and complexity.

Overall Scoring

Evaluation criterion	Maximum	Pauly Rogers	Zwygart
Governmental and municipal audit experience	25	24.0	20.0
Qualifications and experience of assigned personnel	10	9.0	8.0
Audit approach work plan and schedule	25	19.0	16.0
References and demonstrated capacity	10	10.0	7.0
Proposed fees	30	18.5	30.0
Total	100	80.5	81.0

Evaluation Method

The assessment applied the five criteria and point weights in Section III A of the RFP. Technical scores reflect the evidence actually provided in each proposal. Required qualifications and disclosures that were omitted or left for later production were not assumed to be satisfied. The fee score uses the total not-to-exceed fees stated for all three contemplated fiscal years, with the lowest evaluated total receiving 30 points and the other proposal receiving a proportionate score: lowest total divided by evaluated total, multiplied by 30.

Firm	FY 2026	FY 2027	FY 2028	Three-year total	Fee score
Pauly Rogers	\$15,900	\$16,900	\$17,850	\$50,650	18.5
Zwygart	\$10,000	\$10,400	\$10,800	\$31,200	30.0

Pauly Rogers separately itemizes the annual audit, assistance with compilation of financial reports, and nine additional bound copies, then states the combined amount as its total. Because the RFP requires a final audited annual financial report and ten bound copies, this assessment uses the stated total rather than presuming that an item can be removed. For clarification, the District may want to confirm whether the compilation charge is necessary given that District staff will prepare draft financial statements and whether the quoted total is the firm's not-to-exceed price for the full RFP scope.

Detailed Assessment

Governmental and Municipal Audit Experience

Pauly Rogers 24 of 25. The firm reports more than 75 years serving Oregon entities, more than 150 Oregon engagements annually, and more than 30 special service district audits each year. Its examples include Josephine Community Library District, several irrigation and fire districts, and Baker County. The proposal demonstrates highly relevant Oregon municipal and special district work, including a directly comparable library district. One point is reserved because the proposal gives a representative client list rather than a fuller inventory tied to the District's size and fund structure.

Zwygart 20 of 25. The firm reports approximately 30 Oregon municipal audit clients and work for counties, cities, fire, recreation, health, and conservation districts. It also audits two library districts in Idaho. This is substantial relevant experience, but the proposal identifies only three Oregon city clients and does not state the years served. It does not identify an Oregon library or Oregon special district reference comparable to BCLD.

Qualifications and Experience of Assigned Personnel

Pauly Rogers 9 of 10. The proposal identifies an engagement partner, concurring partner, senior compliance manager, compliance manager, a client service manager, and up to five associates. Resumes document extensive governmental audit work and Oregon municipal auditor credentials for key personnel. The team structure provides several levels of review. The proposal does not identify the specific client service manager or associates who would perform much of the engagement, and it gives participation by staff level rather than by named individual.

Zwygart 8 of 10. John Russell would serve as lead partner, oversee all work, and attend fieldwork; Jordan Zwygart would primarily review the audit. The proposal states they have more than 15 and 10 years of municipal audit experience, respectively, and describes six additional staff with up to nine years of experience. It does not provide license or roster numbers, staff names and resumes, specific assignments beyond the two partners, or estimated participation by person.

Audit Approach Work Plan and Schedule

Pauly Rogers 19 of 25. The proposal describes risk assessment, internal-control walkthroughs, compliance testing, analytical review, substantive procedures, sampling, confirmations, payroll and expenditure testing, multi-level review, communications with management and the Board, and an estimated 89-hour staffing plan. These are strong methodological details. Deductions apply because the FY 2026 schedule is not a workable project calendar as submitted: it lists planning and interim work in months preceding the August 31 proposal deadline, states that November 15 delivery cannot be guaranteed, and provides no definite alternative completion or filing date. District preparation requirements are described generally but without requested deadlines or an estimate of District staff time. The statement of services also promises one bound copy and one PDF, while the fee table adds nine copies; the proposal does not expressly address PDF accessibility.

Zwygart 16 of 25. The proposal outlines electronic preliminary work, one to two days of on-site fieldwork, internal quality-control review, regular communication, a November draft, Board presentation, and filing before December 31. It also proposes a secure portal and on-site review of records that are difficult to upload. The response does not describe audit testing, sampling, analytical procedures, risk assessment, internal-control work, anticipated audit problems, or the specific schedules and assistance required from BCLD. It does not commit to a November 15 final report or provide milestones for adjustments, management review, final delivery, and filing assistance.

References and Demonstrated Capacity

Pauly Rogers 10 of 10. The firm identifies five comparable Oregon governmental references with scope, years served, contact names, telephone numbers, and email addresses. The list includes Josephine Community Library District and Baker County. Its more than 25 dedicated Oregon auditors, management structure, and reported annual engagement volume demonstrate capacity for an audit of BCLD's size.

Zwygart 7 of 10. The firm supplies three Oregon city references and reports a team of two partners plus six staff serving about 30 Oregon municipal entities. This demonstrates meaningful capacity. The reference entries omit email addresses and service periods required by the RFP, and the proposal gives limited evidence about workload allocation, backup coverage, or the experience of the six unnamed staff members.

Proposed Fees

Pauly Rogers 18.5 of 30. The stated three-year total is \$50,650, inclusive of travel and supplies. The proposal also gives hourly rates for special projects and requires advance approval. The score is calculated proportionately against the lowest total. Clarification is needed regarding the separate compilation charge, the ten-copy requirement, what consultations are included, and whether any numerical limit applies to routine assistance.

Zwygart 30 of 30. The stated three-year total is \$31,200 and includes report preparation, travel, and associated costs. The firm states that it does not charge for questions or assistance throughout the year and would discuss any unusual billable work in advance. It does not provide hourly rates for other services or explain how consultation time is recorded, whether an approval threshold applies, or whether the included assistance is unlimited.

Source Record

Evaluation criteria and submission requirements: Baker County Library District Request for Proposals for Audit Services, Sections II and III, 2026. Proposal evidence: Pauly Rogers and Co PC Auditing Services Proposal, submitted August 31, 2026; Zwygart John and Associates PLLC proposal for Baker County Library District, 2026.

Audit Proposal Assessment and Award Recommendation (BCLD Business Mgr)

Baker County Library District | Fiscal Year Ending June 30 2026

Recommendation

Award the audit services contract to **Zwygart John and Associates PLLC**.

According to the evaluation criterion, Zwygart has a significant advantage in the overall scoring total, with a margin of 12.0 points in their favor.

Overall Scoring

Evaluation criterion	Maximum	Pauly Rogers	Zwygart
Governmental and municipal audit experience	25	25.0	10.0
Qualifications and experience of assigned personnel	10	10.0	10.0
Audit approach work plan and schedule	25	15.0	25.0
References and demonstrated capacity	10	10.0	10.0
Proposed fees	30	13.0	30.0
Total	100	73.0	85.0

Director's Report

September 15, 2026

Reporting period: August 12 through September 15, 2026

Administration Finance and Board Governance

- **Board member resignation.** Joan Spriggs submitted a resignation letter effective 9/15/2026.
- **Annual reporting.** The FY 2025-26 statistics report for the State Library is in progress.
- **Audit services.** Proposals received through the District's audit-services solicitation were reviewed. Staff prepared an evaluation summary and recommendation for Board consideration. The review considered firm qualifications, governmental-audit experience, proposed approach and schedule, references, independence, insurance, and total cost. A schedule supporting timely filing without an extension received stronger consideration, although a first-year extension was permitted.
- **Account security.** A new staff password is in effect for internal systems.
- **Subpoena for video camera records.** On 9/15/26, I received a court-issued subpoena for library security camera files for use in a child custody case. Relevant files have been provided to the requesting law firm.

Personnel and Training

- **Mandatory reporting.** Leah Roper of the Oregon Department of Human Services Child Welfare program presented required guidance on reporting suspected abuse, neglect, financial exploitation, and threats of harm involving children or vulnerable adults. Staff reviewed reporting procedures and scenarios.
- **Annual Staff Training Day & follow-up.** The District's all-staff training event was held on Thursday, Aug 20. Baker County Fire Department staff provided information and hands-on practice using fire extinguishers. Staff had an opportunity to interview and introduce a "partner" staff member, learned about cybersecurity, reviewed trends, policies, procedures, and benefits, and participated in an activity which tested knowledge about library rules and programs. A post-Training Day staff survey will be shared with staff to collect feedback and satisfaction with the event.
- **Staffing.** Newly hired Library Pages Lane Collier and Cooper Bain resigned. Staff are working on recruiting replacements.
- **Conference coverage.** Vanessa McClarin is attending the Association for Rural and Small Libraries conference September 15-20 and returns September 21. Heather is available for urgent processing needs during the absence.
- **Cybersecurity training.** The Director and IT staff plan to attend a cybersecurity conference in Pendleton in late September.
- **EveryLibrary training.** The Director and one administrative staff will be traveling to training by the library advocacy non-profit, EveryLibrary, in Maupin on Oct 15-16. The event will focus on effective public relations strategies and is sponsored by Libraries of Eastern Oregon.

Facilities Vehicles and Energy

- **Northwest curtain wall.** Planning continues for an insulated exterior wall serving the IT Storage and Garden Room area. The latest preliminary cost estimate is approximately \$40,000.
- **Baker Library maintenance.** Annual carpet cleaning for the Baker branch began after hours beginning Saturday, 9/12 and continued for the next two evenings. Facilities staff will be scheduling a restriping of Baker parking lots. A prior parking-lot patch has settled and is now a trip hazard requiring correction.
- **Grounds.** The Powder River Correctional Facility adults-in-custody crew performed grounds work on September 11.

Programs Services and Outreach

- **Library Card Sign-up Month.** During September, patrons may request a one-time waiver of eligible late-fine balances and receive a replacement card at no charge. Manually applied miscellaneous charges are not included.
- **High School Sports Schedule sponsorship.** BCLD will have an ad in posters and pocket calendars for Baker Bulldog sports. The ad will promote the BrainFuse HelpNow online tutor service, which has had low usage this past year.

Circulation and Service Operations

- **Table Tennis Kit parts replaced.** Due to regular wear and tear, new paddles were obtained for the circulating ping pong kits. The resources have had robust use with over 125 checkouts logged on the two kits since the program began a year ago in partnership with the Rotary Club.

Collections and Technical Services

Measure	Recent month	Prior month	Two months ago
Collection total	142,011	141,893	141,838
Items in repair	223	204	236
Items cataloged	565	588	551
Items processed	518	518	600

Safety and Security

Staff documented five significant incidents during the reporting period. Names of patrons are omitted from this report.

- **August 17 - suspected theft.** A video card was confirmed missing from a public workstation in the Discovery Zone. The incident remains under investigation.
- **August 19 - theft of Library property.** Two individuals were involved in the theft of parts from a wireless charging unit. One received a one-year trespass notice; the other received a six-month notice.
- **August 27 - violent disturbance.** An individual was trespassed after disruptive noise and hazardous behavior, including throwing a phone and damaging Library property. Baker City Police later arrested and charged the individual.
- **September 8 - vaping.** A juvenile received a six-month trespass notice for vaping in the Library.
- **September 9 - unauthorized computer access.** Youth circumvented the SAM login requirement in the Discovery Zone. Staff advised all youth present that future circumvention will result in loss of computer privileges.

Technology

- **Public Wi-Fi.** Session length was increased to three hours.
- **Endpoint management.** IT is evaluating a back-end management utility to deploy updates more efficiently. Update volume has increased substantially in response to emerging AI-related security threats.
- **Connectivity.** Intermittent internet outages have increased. IT is monitoring whether update activity is contributing to the disruptions.

Upcoming Dates

Date	Event
October 9	No StoryTime
October 12	District closed for Indigenous Peoples' Day and Columbus Day holiday
October 13	Regular Board meeting at 5:00 p.m.
October 16	Staff Halloween party