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Form **990-EZ****Short Form**  
**Return of Organization Exempt From Income Tax**Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

► Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$500,000 and total assets less than \$1,250,000 at the end of the year may use this form.

► The organization may have to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-1150

**2009****Open to Public Inspection**Department of the Treasury  
Internal Revenue Service**A** For the 2009 calendar year, or tax year beginning **January 1**, 2009, and ending **December 31**, 20 **09****B** Check if applicable:

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Terminated  
☐ Amended return  
☐ Application pending

Please use IRS label or print or type. See Specific Instructions.

**C** Name of organization**Ardmore Free Library**

Number and street (or P.O. box, if mail is not delivered to street address) Room/suite

**108 Ardmore Avenue**

City or town, state or country, and ZIP + 4

**Ardmore, PA 19003-1399****D** Employer identification number**23 1381372****E** Telephone number**610-642-5187****F** Group Exemption Number ►• **Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).****G** Accounting Method ☒ Cash ☐ Accrual  
Other (specify) ►**H** Check ☒ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)**I** Website: **www.lmls.org****J** Tax-exempt status (check only one) — ☒ 501(c) ( 3 ) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527**K** Check ☐ if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A Form 990-EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return.**L** Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts; if \$500,000 or more, file Form 990 instead of Form 990-EZ. **\$****Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See the instructions for Part I.)

Revenue	1	Contributions, gifts, grants, and similar amounts received . . . . .	1	22,578
	2	Program service revenue including government fees and contracts . . . . .	2	1,703
	3	Membership dues and assessments . . . . .	3	15,089
	4	Investment income . . . . .	4	1,887
	5a	Gross amount from sale of assets other than inventory . . . . .	5a	0
	b	Less: cost or other basis and sales expenses . . . . .	5b	0
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) . . . . .	5c	0
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/> . . . . .		
	a	Gross revenue (not including \$ 0 of contributions reported on line 1) . . . . .	6a	0
	b	Less: direct expenses other than fundraising expenses . . . . .	6b	0
c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a) . . . . .	6c	0	
7a	Gross sales of inventory, less returns and allowances . . . . .	7a	3762	
b	Less: cost of goods sold . . . . .	7b	0	
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) . . . . .	7c	3,762	
8	Other revenue (describe ► <b>Refund of loan (\$3,100), insurance settlement (\$139), misc (\$327)</b> ) . . . . .	8	3566	
9	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 . . . . .	9	48,585	
Expenses	10	Grants and similar amounts paid (attach schedule) . . . . .	10	0
	11	Benefits paid to or for members . . . . .	11	0
	12	Salaries, other compensation, and employee benefits . . . . .	12	0
	13	Professional fees and other payments to independent contractors . . . . .	13	4,922
	14	Occupancy, rent, utilities, and maintenance . . . . .	14	3,529
	15	Printing, publications, postage, and shipping . . . . .	15	708
	16	Other expenses (describe ► <b>library collections, programs, supplies, computer, fundraising</b> ) . . . . .	16	29,484
	17	<b>Total expenses.</b> Add lines 10 through 16 . . . . .	17	38,643
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9) . . . . .	18	9,942
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return) . . . . .	19	112,054
	20	Other changes in net assets or fund balances (attach explanation) . . . . .	20	422
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 . . . . .	21	122,418

**Part II Balance Sheets.** If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II.)

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments . . . . .	112,054	122,418
23 Land and buildings . . . . .	0	0
24 Other assets (describe ► . . . . .)	0	0
25 <b>Total assets</b> . . . . .	112,054	122,418
26 <b>Total liabilities</b> (describe ► . . . . .)	0	0
27 <b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21) . . . . .	112,054	122,418

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Cat No 106421

Form **990-EZ** (2009)

SCANNED OCT 28 2010

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**Part III Statement of Program Service Accomplishments** (See the instructions for Part III.)What is the organization's primary exempt purpose? Community Library

Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

**Expenses**

(Required for section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts; optional for others)

<b>28</b>	Full service community library Circulation of books and materials, programs benefiting the community. 91,000 visits per year; 300 patrons per day		
	(Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>28a</b>	38,643
<b>29</b>			
	(Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>29a</b>	
<b>30</b>			
	(Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>30a</b>	
<b>31</b>	Other program services (attach schedule)		
	(Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>31a</b>	
<b>32</b>	<b>Total program service expenses</b> (add lines 28a through 31a)	<b>32</b>	38,643

**Part IV List of Officers, Directors, Trustees, and Key Employees.** List each one even if not compensated. (See the instructions for Part IV.)

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
Patricia Suplee 108 Ardmore Ave., Ardmore PA 19003	President 12 hr/wk	0	0	0
Martha Slawek 108 Ardmore Ave., Ardmore PA 19003	Vice President 4 hr/wk	0	0	0
Neeti Verma 108 Ardmore Ave., Ardmore PA 19003	Secretary 4 hr/wk	0	0	0
Barbara Schick 108 Ardmore Ave., Ardmore PA 19003	Treasurer 6 hr/week	0	0	0
Judy Weinstein 108 Ardmore Ave., Ardmore PA 19003	Asst. Treasurer 2 hr/wk	0	0	0
Ann Kirschner 108 Ardmore Ave., Ardmore PA 19003	Library System Rep. 4hr/w	0	0	0
Lenore Forsted 108 Ardmore Ave., Ardmore PA 19003	Alt.Libr.System Rep. 2 hr/w	0	0	0
Ralph Ashbrook 108 Ardmore Ave., Ardmore PA 19003	Trustee 3 hr/wk	0	0	0
Charlie E. Dorkey, Jr. 108 Ardmore Ave., Ardmore PA 19003	Trustee 1 hr/wk	0	0	0
Richard Force 108 Ardmore Ave., Ardmore PA 19003	Trustee 1 hr/wk	0	0	0
Patricia Wilson 108 Ardmore Ave., Ardmore PA 19003	Trustee 1 hr/wk	0	0	0
Abigail Garfield 108 Ardmore Ave., Ardmore PA 19003	Trustee 2 hr/wk	0	0	0
Deborah Kaplan 108 Ardmore Ave., Ardmore PA 19003	Trustee 1.5 hr/wk	0	0	0
Jane Luce 108 Ardmore Ave., Ardmore PA 19003	Trustee 1 hr/wk	0	0	0
Barbara Montgomery 108 Ardmore Ave., Ardmore PA 19003	Trustee 1 hr/wk	0	0	0
		0	0	0

**Part V Other Information** (Note the statement requirements in the instructions for Part V.)

	Yes	No
<b>33</b> Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity . . . . .		✓
<b>34</b> Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes . . . . .	✓	
<b>35</b> If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T.		
<b>a</b> Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements? . . . . .		✓
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .		
<b>36</b> Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N . . . . .		
<b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ <b>37a</b> . . . . .		
<b>b</b> Did the organization file <b>Form 1120-POL</b> for this year? . . . . .		✓
<b>38a</b> Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the period covered by this return? . . . . .		✓
<b>b</b> If "Yes," complete Schedule L, Part II and enter the total amount involved . . . . . <b>38b</b> . . . . .		
<b>39</b> Section 501(c)(7) organizations. Enter:		
<b>a</b> Initiation fees and capital contributions included on line 9 . . . . . <b>39a</b> . . . . .		
<b>b</b> Gross receipts, included on line 9, for public use of club facilities . . . . . <b>39b</b> . . . . .		
<b>40a</b> Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under:		
section 4911 ▶ <u>N/A</u> ; section 4912 ▶ <u>N/A</u> ; section 4955 ▶ <u>N/A</u>		
<b>b</b> Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I . . . . .		✓
<b>c</b> Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 . . . . . ▶ . . . . .		
<b>d</b> Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization . . . . . ▶ . . . . .		
<b>e</b> All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T . . . . .		✓
<b>41</b> List the states with which a copy of this return is filed. ▶ <u>Pennsylvania</u>		
<b>42a</b> The organization's books are in care of ▶ <u>Barbara Schick, c/o Ardmore Free Library</u> Telephone no. ▶ <u>(610)6425187</u>		
Located at ▶ <u>108 Ardmore Avenue, Ardmore PA</u> ZIP + 4 ▶ <u>19003-1399</u>		
<b>b</b> At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . . . . .		✓
If "Yes," enter the name of the foreign country: ▶ . . . . .		
See the instructions for exceptions and filing requirements for <b>Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts</b> .		
<b>c</b> At any time during the calendar year, did the organization maintain an office outside of the U.S.? . . . . .		✓
If "Yes," enter the name of the foreign country: ▶ . . . . .		
<b>43</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of <b>Form 1041</b> —Check here . . . . . ▶ <input checked="" type="checkbox"/>		
and enter the amount of tax-exempt interest received or accrued during the tax year . . . . . ▶ <b>43</b> . . . . .		
<b>44</b> Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ . . . . .		✓
<b>45</b> Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ . . . . .		✓

**Part VI**

**Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only.** All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46–49b and complete the tables for lines 50 and 51.

<b>46</b>	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I . . . . .	<b>46</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>47</b>	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II . . . . .	<b>47</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>48</b>	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E . . . . .	<b>48</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>49a</b>	Did the organization make any transfers to an exempt non-charitable related organization? . . . . .	<b>49a</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>b</b>	If "Yes," was the related organization a section 527 organization? . . . . .	<b>49b</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>50</b>	Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."			

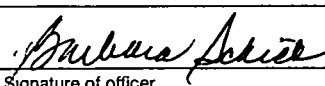
(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
None				

**f** Total number of other employees paid over \$100,000 . . . . . ▶ \_\_\_\_\_

**51** Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
None		

**d** Total number of other independent contractors each receiving over \$100,000 . . . . . ▶ \_\_\_\_\_

<b>Sign Here</b>	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.			
	 Signature of officer		10/15/2010 Date	
	Barbara Schick, Treasurer Type or print name and title			
<b>Paid Preparer's Use Only</b>	Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	Preparer's identifying number (See instructions)
	Firm's name (or yours if self-employed), address, and ZIP + 4	EIN		Phone no
	May the IRS discuss this return with the preparer shown above? See instructions . . . . . ▶ <input type="checkbox"/> Yes <input type="checkbox"/> No			

Department of the Treasury  
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

OMB No. 1545-0047

2009

**Open to Public Inspection**

Name of the organization

Ardmore Free Library

Employer identification number

23 : 1381372

The organization is not a private foundation because it is. (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
  - 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E)
  - 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
  - 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state \_\_\_\_\_
  - 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
  - 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
  - 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
  - 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
  - 9 ☐ An organization that normally receives: (1) more than 33⅓ % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33⅓ % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
  - 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
  - 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.  

a ☐ Type I

b ☐ Type II

c ☐ Type III—Functionally integrated

d ☐ Type III—Other

  - e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
  - f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box ☐
  - g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

	Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?		
(ii) A family member of a person described in (i) above?		
(iii) A 35% controlled entity of a person described in (i) or (ii) above?		
  - h Provide the following information about the supported organization(s).

[illegible]

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**  
 (Complete only if you checked the box on line 5, 7, or 8 of Part I.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	22,448	18,000	22,355	19,717	26,339	108,859
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	0	0	0	0	0	0
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge	0	0	0	0	0	0
<b>4 Total.</b> Add lines 1 through 3	22,448	18,000	22,355	19,717	26,339	108,859
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						0
<b>6 Public support.</b> Subtract line 5 from line 4.						108,859

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>7</b> Amounts from line 4	22,448	18,000	22,355	19,717	26,339	108,859
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	1,725	3,410	4,081	3,636	1,887	14,739
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)	18,920	19,674	15,930	16,572	20,359	91,455
<b>11 Total support.</b> Add lines 7 through 10						215,053
<b>12</b> Gross receipts from related activities, etc. (see instructions)					12	0
<b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> ▶ <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	<b>14</b>	50.5 %
<b>15</b> Public support percentage from 2008 Schedule A, Part II, line 14	<b>15</b>	50.8 %
<b>16a 33⅓% support test—2009.</b> If the organization did not check the box on line 13, and line 14 is 33⅓% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input checked="" type="checkbox"/>		
<b>b 33⅓% support test—2008.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33⅓% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
<b>17a 10%-facts-and-circumstances test—2009.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
<b>b 10%-facts-and-circumstances test—2008.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>		

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**  
(Complete only if you checked the box on line 9 of Part I.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>6 Total.</b> Add lines 1 through 5						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
<b>c</b> Add lines 7a and 7b						
<b>8 Public support</b> (Subtract line 7c from line 6)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>9</b> Amounts from line 6						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
<b>c</b> Add lines 10a and 10b						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12)						
<b>14 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	<b>15</b>	%
<b>16</b> Public support percentage from 2008 Schedule A, Part III, line 15	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	<b>17</b>	%
<b>18</b> Investment income percentage from 2008 Schedule A, Part III, line 17	<b>18</b>	%

**19a 33⅓ % support tests—2009.** If the organization did not check the box on line 14, and line 15 is more than 33⅓ %, and line 17 is not more than 33⅓ %, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

**b 33⅓ % support tests—2008.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33⅓ %, and line 18 is not more than 33⅓ %, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐



**Part IV** **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Provide any other additional information. See instructions.

Area for supplemental information with horizontal dashed lines.

Ardmore Free Library

ID #23-1381372

990EZ and Schedule A for 2009

1) Explanation of Line 20:

The amount of \$422 reflects inaccuracies in entries of value of Certificates of Deposits in the early months of our 2009 spreadsheet. The amount on Line 21 is consistent with the amounts on all our bank and investment statements as of December 31, 2009.

2) Line 34: Please note also that our revised bylaws are attached. Changes are highlighted in yellow marker.

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Barbara Schick  
Treasurer

**ARDMORE FREE LIBRARY BY LAWS**  
Amended September 17, 2009

**Article I**  
**Name and Purpose**

- Sec. 1 The name of this organization shall be the Ardmore Free Library.
- Sec. 2 The purpose of this organization is to provide free public library service in the Township of Lower Merion; to build and maintain the best possible collection of library materials, both print and non-print, and organize it for ease of access; to serve the community as a center of reliable information; to provide the opportunity for recreation and study through access to library materials and digital media; and to support the educational, civic, and cultural activities of groups and organizations in the Lower Merion Township community.
- Sec. 3 This organization shall be a constituent member of the Lower Merion Library System ("LMLS") and shall comply with its policies.

**Article II**  
**Board of Trustees**

- Sec. 1 (a) The Board of Trustees shall consist of up to 20 voting members, residents of or employed in Ardmore or Lower Merion Township, who are elected by the Board for a term of three (3) years.
- (b) Any trustee may be allowed to continue serving on the Board of Trustees for one (1) additional three-year term subject to approval for such additional three-year term at the December regular meeting after having been nominated for an additional three-year term at the November regular meeting. The Board must approve such additional three-year term by a vote of at least a quorum of members.
- (c) No person, after being elected for two successive three-year terms shall be eligible to serve as a Trustee until the lapse of at least one (1) year ("the sabbatical year") following the expiration of the second such term.
- (d) Any person whose sixth year as a Trustee ends in the middle of a term as an Officer or as representative to the Board of the Lower Merion Library System may continue to serve on the Board until the end of the following year.
- (e) Should there be resignations of Trustees during the year, the nominating committee may make recommendations to the full Board of additional Trustees. The full Board of Trustees will vote on the nominations at the next month's meeting, provided there is a quorum present. The term of such new Trustee shall be deemed to have begun the preceding January if elected between January and June and the following January, if elected between July and December.

Sec. 2 The foregoing rules apply to the current Trustees as follows:

(a) For those Trustees elected prior to the year 2000, their sabbatical year will commence on January 1, 2011.

(b) For those Trustees elected between the years 2000 and 2005, their sabbatical year will commence on January 1, 2012.

(c) For those Trustees elected between the years 2005 and 2007, their sabbatical year will commence on January 1, 2013.

(d) For those Trustees elected in 2008, their sabbatical year will commence on January 1, 2015.

Sec. 3 Honorary Trustees may be elected by a quorum of the Board present at any December regular meeting. Such Honorary Trustee first shall be nominated for election by a majority of the Trustees and shall be those persons who in the opinion of the Trustees have (a) rendered outstanding service to the Ardmere Free Library and who have (b) completed a minimum of twelve (12) years on the Board and (c) no longer serve as elected Trustees.

Honorary Trustees shall serve a maximum of ten (10) years and shall be ex-officio members of the Board of Trustees entitled to notice of and participation in Board meetings but not entitled to vote. They shall not be counted in determining a quorum of the Trustees.

Sec. 4 The duties and responsibilities of the Board of Trustees shall be those identified by the Lower Merion Library System as well as active participation in fundraising, programming, advocating for the Library and LMLS, and providing assistance to the Head Librarian.

Sec. 5 It shall be the duty of all members of the Board to attend meetings of the Board. Absence from four (4) Board meetings during a calendar year, except under extraordinary circumstances, shall be equivalent to resignation from the Board and will take effect as of thirty (30) days after the fourth absence. Notice of such resignation will be given by the Secretary of the Board.

Sec. 6 Regular meetings of the Board shall be held monthly except in July and August at a time and place determined by the Board. The President of the Board is empowered to call special meetings when required. The June Board meeting will be advertised to the public so that members of the public may attend.

Sec. 7 Under exceptional circumstances, as deemed by the President of the Board, if the Executive Committee or the full Board of Trustees is required to vote on an urgent matter

and is unable to meet in person, Board members may register their votes via e-mail to the Secretary of the Board and/or President. The results of that vote shall be an addendum to the minutes of the prior Board meeting.

Sec. 8 Any matter subject to a vote may be passed provided that a quorum is present. A quorum shall consist of one half plus one voting member of the Board.

Sec. 9 All matters involving individual and prospective Board members and library staff shall be decided by paper ballot. Other matters, such as fundraising, programming and finances may be decided by either show of hands or paper ballot. The Secretary of the Board (or designee) shall announce the results of each vote and shall record the vote tallies in the minutes of that meeting.

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Sec. 10 Meetings shall be conducted according to Robert's Rules of Order.

### **Article III Officers**

Sec. 1 Officers of the Board shall be:

President  
Vice President  
Secretary  
Treasurer

Sec. 2 Election of officers shall take place at the December meeting of the Board from a list of candidates presented by the nominating committee at the November meeting of the Board. Should an officer resign during his or her term, the nominating committee shall meet as soon as possible in order to recommend a new candidate for that position (from the existing Board trustees) at the next Board meeting.

Sec. 3 Officers shall serve terms of two (2) years expiring on the last day of December of each year.

Sec. 4 President:

The President shall be chief executive officer of the Library Board and shall preside over Board meetings. The President shall see that all policies and decisions of the Board are put into effect and serve ex-officio on all committees.

Sec. 5 Vice President:

The Vice President shall, in the absence of the President, perform the duties of the President.

**Sec. 6 Treasurer:**

a) The Treasurer shall have custody of the funds of this organization, shall keep account of receipts and disbursements in books open to examination by the officers and Board members, shall deposit all funds in the name of this organization in depositories designated by the Board and shall arrange for completion of the IRS Form 990 and Pennsylvania income tax forms. The treasurer shall annually submit the accounts of the library to the Township of Lower Merion for audit.

b) As needed, the Board may elect a co-Treasurer to share the responsibilities noted above.

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**Sec. 7 Secretary:**

The Secretary of the Board shall attend all meetings of the Board and record all votes and minutes of all meetings in a book to be kept for such purposes. The Secretary shall attest to any document requiring the same, when authorized and directed to do so by the Library Board. The Secretary shall also maintain a roll of Board members and their terms of election as well as the terms of officers and of the Lower Merion Library System representative and alternate.

**Sec. 8** In case of absence due to illness or disability of any officer of the organization or for any reason deemed sufficient by a member of the Board, the Board may vote to delegate power or duties to any other officer, or to any trustee for the time being.

**Sec. 9** The Board of Trustees shall nominate every other year a member of the Board who is a legal resident of Lower Merion Township to be elected to the Board of Trustees of the Lower Merion Library System ("LMLS") and also a member to act as alternate. The LMLS representative and alternate shall serve for a term of two (2) years.

The LMLS representative shall actively represent the Board and shall report Board affairs to the LMLS. When decisions involving major policy changes are to be acted upon by the LMLS, the representative shall vote the majority opinion of the Board on such issues. The representative shall report LMLS matters to the Board.

**Article IV  
Committees**

**Sec. 1 Standing Committees:**

The President, with the consent of the Board, may appoint, each year, from the membership of the Board, standing committees: executive, finance, and nominating.

## Sec. 2 Executive Committee:

The Executive Committee shall be comprised of the officers of the Board and the LMLS representative or alternate. The Executive Committee may act for the Board between meetings, if necessary. The Executive Committee also is authorized by the Board to act on its behalf if the need should arise during the months of July and August when the Board does not convene. All actions of the Executive Committee must be reported to the full Board at the next regular meeting.

## Sec. 3 Finance Committee:

1. This committee shall consist of the President and Treasurer of the Board, chairman of the fund drive committee and the Head Librarian or other Trustees appointed by the President.

2. This committee shall be responsible for preparation of the annual operating budget with the advice and guidance of the Director of the Libraries of the Lower Merion Library System and recommend this budget for approval by the Board.

3. This committee shall advise the Board in all financial matters.

## Sec. 4 Nominating Committee:

The President shall appoint a nominating committee for new Trustees and officers, comprised of three (3) members of the Board. The committee shall review the qualifications of possible candidates and recommend them to the Board at its November meeting. Elections shall be held in December.

Should there be resignations of Trustees during the year, the nominating committee may meet and make recommendations for additional Trustees to the full Board.

## Sec. 5 Special Committees:

The President, with the consent of the Board, may appoint from its membership special committees for any purpose specified, including but not limited to fund drive, programming, and public relations.

## **Article V Head Librarian**

The Head Librarian shall be responsible for carrying out the policies of the Lower Merion Library System and the decisions of the Ardmore Library Board. He/she shall be responsible to the LMLS Director of Libraries for the professional conduct of his/her duties.

## **Article VI Dissolution**

In the event of dissolution of this organization its assets shall be distributed to such organization or organizations as may be selected by the Library Board provided that such organization or organizations shall be such as are described in Section 501 (c) (3) of the Internal Revenue Code of 1954, or corresponding provisions if the Internal Revenue Law which shall be in effect at the time of dissolution.

## **Article VII Amendment of By-Laws**

These By-Laws may be amended at any regular meeting of the Library Board, or any special meeting called for that purpose, by affirmative vote of two-thirds of the voting members. Notice of the text of the proposed amendment shall be given at least one month in advance of voting thereon.

## **Article VIII Indemnification Statement for Non-profit Boards**

Directors shall not be personally liable for monetary damages as such for any action taken, or any failure to take any action, unless (a) the Director has breached or failed to perform the duties of the Director's office as set forth under Chapter 57 of the Nonprofit Corporation Law, and (b) the breach or failure to perform constitutes self-dealing, willful misconduct or recklessness. The provisions of this paragraph shall not apply to (a) the responsibility or liability of a Director pursuant to any criminal statute or (b) the liability of a Director for the payment of taxes pursuant to local, state or federal law.

## **Article IX LMLS Whistleblower Policy**

- Sec. 1 The Ardmore Free Library is committed to operating in furtherance of its tax-exempt purposes and in compliance with all applicable laws, rules and regulations, including those concerning accounting and auditing, and prohibits fraudulent practices by any of its board members, officers, employees, or volunteers. This policy outlines a procedure for employees to report actions, which an employee reasonably believes violate a law, or regulation or that constitute fraudulent accounting or other practices. This policy applies to any matter which is related to the Ardmore Free Library's mission and does not relate to private acts of an individual not connected to the mission of the Ardmore Free Library.
- Sec. 2 If an employee has a good faith, reasonable belief that the Ardmore Free Library (its board members, officers, employees, or volunteers) has engaged in any action that violates any applicable law or regulation (including those concerning accounting and



auditing) or that constitutes a fraudulent practice, he or she may report such information to the Head Librarian or to the Director of Libraries. Such report must be made no later than 30 days after the employee becomes aware of such alleged violation or practice. If the employee does not feel comfortable reporting the information to the Head Librarian or Director of Libraries, he or she may report the information to the Township Manager or to the Head of Human Resources.

- Sec. 3 All reports will be followed up promptly, and an investigation conducted. In conducting its investigations, the Ardmore Free Library will strive to keep the identity of the complaining individual as confidential as possible, while conducting an adequate review and investigation.
- Sec. 4 The Ardmore Free Library will not retaliate against an employee in the terms and conditions of employment because that employee: (a) reports to a supervisor, to the Head Librarian, to the Director of Libraries, to the Board of Directors, or to a federal, state or local agency what the employee believes in good faith to be a violation of the law; or (b) participates in good faith in any resulting investigation or proceeding, or (c) exercises his or her rights under any state or federal law(s) or regulations(s) to pursue a claim or take legal action to protect the employee's rights.
- Sec. 5 The Ardmore Free Library may take disciplinary action (up to and including termination) against an employee who in management's assessment has engaged in retaliatory conduct in violation of this policy.
- Sec. 6 In addition, the Ardmore Free Library will not take any action harmful to any employee who in good faith and with reasonable belief has provided to law enforcement personnel or a court truthful information relating to the commission or possible commission by the Ardmore Free Library of a violation or practice, as defined hereinabove.
- Sec. 7 Supervisors will be advised of this policy and the Ardmore Free Library's prohibition against retaliation.

## **Article X**

### **Conflict of Interest Policy**

This Article provides guidelines for identifying, disclosing and managing conflicts of interest and situations that may result in the appearance of conflicts of interest. Ardmore Free Library board members and staff shall be informed of this policy at the commencement of their term of office or employment as applicable. The goal of this policy is to disclose any conflicts or potential conflicts to (i) the Head Librarian (ii) the President of the Ardmore Library Board, or (iii) the Director of LMLS. Questions about the policy may also be directed to such persons.

- Sec. 1 **Conflict of Interest** A conflict of interest arises when a board or staff member has a personal interest that conflicts with the interests of the Ardmore Free Library and which may appear to show a lack of integrity. A conflict of interest may also arise in situations

where a board or staff member may make a decision that would lead to inappropriate financial gain for that person or member of his or her family.

**Sec. 2 Persons affected by this policy.** Typically, persons who are affected by a conflict of interest policy are the Library's board members, officers, and senior staff. In some cases a major donor could also be in a conflict situation. The Ardmore Free Library takes a broad view of conflicts, and board/staff are urged to think of how a situation/transaction would appear to outside parties when identifying conflicts or possible conflicts of interest.

**Sec. 3 Disclosure of Conflicts.** Board and staff are also urged to disclose conflicts as they arise; insofar as possible such disclosure should occur prior to the event that gives rise to the conflict. The Board or the supervising staff member shall address the potential conflict and make every effort to eliminate it. Should that not be possible, the Board or staff member may be required to recuse himself or herself from the relevant situation.

**Sec. 4 Procedures to manage conflicts.** For each interest disclosed, the full board, or the President of the Board, or the Head Librarian or the Director of Libraries (as appropriate) will determine whether the organization should: (a) take no action or (b) disclose the situation more broadly and invite discussion/resolution by the full board of what action to take, or (c) refrain from taking action and otherwise avoid the conflict.

If the conflict was related to a board member, both the conflict and the outcome ((a), (b), or (c) above) will be documented in the minutes of the board meeting. If the conflict was related to a staff member, the Head Librarian will report that information, if appropriate, to the President of the Board or the Director of LMLS.

## **Article XI**

### **Record Retention Policy**

**Sec. 1** Private non-profit organizations are required to maintain key records of organization operations for any reviews and audits for varying amounts of time depending upon the type of record. The goal of the Lower Merion Library System is to establish a consistent policy of records retention among all member libraries. As a non-profit organization and as a member of the Lower Merion Library System, the Ardmore Free Library agrees to keep the following types of records for the indicated amount of time and to train key personnel on records retention requirements. Members of the System further agree to create a list of applicable records, to update that list as appropriate, and to send list annually to System Headquarters at audit time.

**Sec. 2** Library-specific requirements: Due to the constant changes in automation formats, all records shall be kept in hard copy.

**Sec. 3** Periods for Retention of Records. Listed below are the categories of records and the time frame for which they must be retained, whether such records are the property of Ardmore Free Library, LMLS or the Township of Lower Merion.

LSTA grant records	6 years
Statewide Library Card Statistics (Access PA)	5 years
Annual State Report	Permanent
Backup documentation for the annual report	5 years
Applications (non-hires)	1 year
Magnetic tape and tab cards	1 year
Purchase orders (except purchasing-department copy)	1 year
Receiving sheets	1 year
Requisitions	1 year
Stenographers' notebooks	1 year
Inventory withdrawal forms	1 year
Bank reconciliations	2 years
Correspondence (general)	2 years
Correspondence (routine) with customers and/or vendors	2 years
Duplicate deposit slips	2 years
Age Work Certification Records (if minors are employed)	3 years
Bank statements	3 years
COBRA statements	3 years
Employment advertisements	3 years
Employment applications	3 years
FMLA records (section 825.500, Federal Family and Medical Leave Act)	3 years
Insurance policies (expired)	3 years
Internal audit reports (longer retention period may be desirable)	3 years

Internal reports (miscellaneous)	3 years
OSHA training documentation	3 years
Petty cash vouchers	3 years
Physical inventory tags	3 years
Sales commission reports	3 years
Form I-9	1 year beyond Termination
Attendance records	4 years
Form W-4	4 years after filing year
Depreciations schedules property disposal	4 years after
OSHA logs	5 years plus current year
Payroll records (including name, address, ssn, wage rate, hours worked daily, weekly gross wages, deductions, allowances claimed, and net wages)	6 years
Personnel file records (including application, pre-employment tests, performance appraisals, rate changes, position changes, transfers, promotions, demotions, documentation of disciplinary actions, and job descriptions)	6 years
Employee benefit plans	6 years following plan termination
Accounts payable ledgers and schedules	7 years
Checks (canceled)	7 years
Contracts, mortgages, notes, and leases (expired)	7 years
Expense analyses/expense distribution schedules	7 years
Inventories of products, materials and supplies	7 years

Notes receivable ledgers and schedules	7 years
Options records (expired)	7 years
Plant cost ledgers	7 years
Purchase orders (purchasing department copy)	7 years
Sales records	7 years
Scrap and salvage records (inventory, sales, etc.)	7 years
Stock and bond certificates (canceled)	7 years
Subsidiary ledgers	7 years
Time books and cards	7 years
Voucher register and schedules	7 years
Vouchers for payments to vendors, employees, etc. (includes allowances and reimbursements of employees and officers for travel/entertainment expenses)	7 years
Withholding tax statements	7 years
Garnishments	7 years
Invoices (to customers, from vendors)	7 years
Paychecks	8 years
Accident report/claims (settled cases)	11 years
Employee medical records and analysis (as required by OSHA, must be kept in separate file)	During employment plus 30 years
Material Safety Data Sheets (MSDS)	During employment plus 30 years
ADA; records pertaining to unfair/discriminatory employment and Americans with Disabilities Act	Until final disposition

Medical and exposure records	40 years
Loan documents	Indefinitely
Labor contracts	Indefinitely
Audit reports	Permanently
Capital stock and bond records; ledgers, transfer registers, stubs showing issues, record of interest coupons, options, etc.	Permanently
Cash books	Permanently
Chart of accounts	Permanently
Checks (canceled) for important payments, e.g. taxes, purchases of property, special contracts, etc. Checks should be filed with papers pertaining to the underlying transaction	Permanently
Contracts, mortgages, notes, and leases (still in effect)	Permanently
Correspondence (legal and important matters only)	Permanently
Deeds, mortgages, and bills of sale	Permanently
Financial statements (year-end, others optional)	Permanently
General/private ledgers, year-end trial balance	Permanently
Insurance records, current accident reports, claims, policies, etc.	Permanently
Minutes, bylaws, and charter	Permanently
Patents and related papers	Permanently
Property appraisals by outside appraisers	Permanently
Property records, including costs, depreciation reserves, year-end trial balances, depreciations schedules, blueprints, and plans	Permanently
Retirement and pension records	Permanently
Tax returns and worksheets, revenue agents' reports, and other documents relating to the determination of income tax liability	Permanently
Trademark registrations and copyrights	Permanently

Training manuals	Permanent
Union agreements	Permanent
Journals	Permanent

## 2010 Ardmore Library Board of Trustees

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