

## **Regular Board Meeting**

Tuesday, December 17, 2024 6:30 PM

Addison Public Library - Large Meeting Room 1st floor, 4 Friendship Plaza,  
Addison, IL 60101

1. **Call to Order**

2. **Roll Call**

3. **Pledge of Allegiance**

4. **Approval of the Agenda**

5. **Public Comment**

6. **Treasurer's Report**

7. **Consent Agenda**

7.A. Approval of Minutes

7.B. Approval of Bills & Disbursements

7.C. FY25 Per Capita Grant Application and FY23 Per  
Capita Grant Expenditures Report

8. **New Business**

8.A. ACTION ITEM: Bid Awards for 17 trade packages  
for library renovation

8.B. ACTION ITEM: Furniture Bid Awards for Library  
Renovation

8.C. ACTION ITEM: AMH Replacement

8.D. Presentations: Employee Service Awards

8.E. ACTION ITEM: Board Bylaws - proposed changes

8.F. ACTION ITEM: Board Policies - Proposed Changes

9. **Reports**

9.A. Director & Staff Reports

9.B. Statistics

9.C. Building Project Report

9.D. Friends of the Library Report

10. **Closed Session: 5 ILCS 120/2(c) (11)**

11. **ACTION ITEM: Action Resulting from Closed  
Session**

12. **Correspondence & Announcements**

12.A. Patron Communication

12.B. Other Correspondence

12.C. Library News

13. **Additional Discussion**

14. **Adjournment**



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4 Friendship Plaza  
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7. **Consent Agenda**
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  - B. Approval of Bills & Disbursements
  - C. FY25 Per Capita Grant Application and FY23 Per Capita Grant Expenditures Report
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  - B. ACTION ITEM: Furniture Bid Awards for Library Renovation
  - C. ACTION ITEM: AMH Replacement
  - D. Presentations: Employee Service Awards
  - E. ACTION ITEM: Board Bylaws - proposed changes
  - F. ACTION ITEM: Board Policies - Proposed Changes
9. **Reports**
  - A. Director & Staff Reports
  - B. Statistics
  - C. Building Project Report
  - D. Friends of the Library Report
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12. **Correspondence & Announcements**
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  - B. Other Correspondence
  - C. Library News
13. **Additional Discussion**
14. **Adjournment**

## Addison Public Library Balance Sheet as of November 30, 2024

	<u>Beginning</u> <u>Balance</u>	<u>M.T.D.</u> <u>Changes</u>	<u>Ending</u> <u>Balance</u>
<hr/> <b>General Fund</b> <hr/>			
<b><u>Assets</u></b>			
10-11-1030 - Cash on Hand - Petty Cash	205.35	0.00	205.35
10-11-1055 - Cash in Bank - Illinois National Bank E-Pay	9.40	0.00	9.40
10-11-1060 - Cash on Hand - Cash Registers	344.14	0.00	344.14
10-11-1065 - Cash in Bank - Harris Bank Friends	6,835.68	(41.36)	6,794.32
10-11-1070 - Cash in Bank - Harris Bank Librarian	2,000.00	0.00	2,000.00
10-11-1075 - Cash in Bank - Harris Bank Comingled	285,390.94	84,055.40	369,446.34
10-11-1085 - Cash in Bank - Ehlers	15,483,728.52	61,240.30	15,544,968.82
10-11-1095 - Cash in Bank - Harris Bank MM	7,817,859.37	(567,091.45)	7,250,767.92
10-11-2000 - Allocated Cash	(16,446,734.61)	112,500.00	(16,334,234.61)
10-12-0100 - Property Taxes Receivable	5,979,656.92	0.00	5,979,656.92
10-12-0101 - Due from State	53,215.63	0.00	53,215.63
	<u>13,182,511.34</u>	<u>(309,337.11)</u>	<u>12,873,174.23</u>
<b>Liabilities and Fund Balance</b>			
<b><u>Liabilities</u></b>			
10-21-2750 - Accounts Payable	144,722.87	(29,859.23)	114,863.64
10-22-0230 - Employee I.M.R.F. Payable	9,021.59	136.73	9,158.32
10-22-0255 - Other Insurance Withholding Payable	(694.87)	694.87	0.00
10-22-0260 - Def Annuity Withholding Payable	(2,782.55)	0.00	(2,782.55)
10-22-0390 - Accrued Payroll	79,692.59	0.00	79,692.59
10-24-0300 - Deferred Property Taxes	5,979,656.92	0.00	5,979,656.92
10-24-0301 - Deferred Revenue - Per Capita Grant	53,017.47	0.00	53,017.47
	<u>6,262,634.02</u>	<u>(29,027.63)</u>	<u>6,233,606.39</u>
<b>Fund Balance</b>			
10-30-2920 - Reserved - F.I.C.A.	(408,850.99)	0.00	(408,850.99)
10-30-2930 - Reserved - I.M.R.F.	144,313.11	0.00	144,313.11
10-30-2940 - Reserved - Unemployment Comp.	14,873.10	0.00	14,873.10
10-30-2950 - Reserved - Liability Insurance	11,717.53	0.00	11,717.53
10-30-2960 - Reserved - Audit	8,956.00	0.00	8,956.00
10-30-2965 - Reserved - Workers Comp	20,608.18	0.00	20,608.18
10-30-2970 - Reserved - Per Capita Grant	188,607.47	0.00	188,607.47
10-30-2990 - Unreserved Fund Balance	3,196,042.78	0.00	3,196,042.78
	<u>3,176,267.18</u>	<u>0.00</u>	<u>3,176,267.18</u>
<b>Total Liabilities and Fund Balance</b>	<u>9,438,901.20</u>	<u>(29,027.63)</u>	<u>9,409,873.57</u>
 <b>Excess Revenues Over Expenses</b>	<u>3,743,610.14</u>	<u>(280,309.48)</u>	<u>3,463,300.66</u>

## Addison Public Library Balance Sheet as of November 30, 2024

	<u>Beginning Balance</u>	<u>M.T.D. Changes</u>	<u>Ending Balance</u>
<hr/> <b>Capital Improvement Fund</b> <hr/>			
<b><u>Assets</u></b>			
80-11-1110 - Cash in Bank - III Metropolitan	649,302.39	2,480.21	651,782.60
80-11-2000 - Allocated Cash	<u>16,444,947.58</u>	<u>(112,500.00)</u>	<u>16,332,447.58</u>
	<u>17,094,249.97</u>	<u>(110,019.79)</u>	<u>16,984,230.18</u>
<b>Liabilities and Fund Balance</b>			
<b><u>Liabilities</u></b>			
80-21-2750 - Accounts Payable	<u>112,500.00</u>	<u>(8,114.58)</u>	<u>104,385.42</u>
	<u>112,500.00</u>	<u>(8,114.58)</u>	<u>104,385.42</u>
<b><u>Fund Balance</u></b>			
80-30-2999 - Reserved for Capital Projects	<u>17,346,830.84</u>	<u>0.00</u>	<u>17,346,830.84</u>
	<u>17,346,830.84</u>	<u>0.00</u>	<u>17,346,830.84</u>
<b>Total Liabilities and Fund Balance</b>	<u><u>17,459,330.84</u></u>	<u><u>(8,114.58)</u></u>	<u><u>17,451,216.26</u></u>
<b>Excess Revenues Over Expenses</b>	<u><u>(365,080.87)</u></u>	<u><u>(101,905.21)</u></u>	<u><u>(466,986.08)</u></u>

<hr/> <b>Rebillables Fund</b> <hr/>			
<b><u>Assets</u></b>			
90-11-2000 - Allocated Cash	<u>1,787.03</u>	<u>0.00</u>	<u>1,787.03</u>
	<u>1,787.03</u>	<u>0.00</u>	<u>1,787.03</u>
<b>Liabilities and Fund Balance</b>			
<b><u>Liabilities</u></b>			
<b><u>Fund Balance</u></b>			
90-30-2990 - Fund Balance	<u>1,787.03</u>	<u>0.00</u>	<u>1,787.03</u>
	<u>1,787.03</u>	<u>0.00</u>	<u>1,787.03</u>
<b>Total Liabilities and Fund Balance</b>	<u><u>1,787.03</u></u>	<u><u>0.00</u></u>	<u><u>1,787.03</u></u>

## Addison Public Library

### Balance Sheet as of November 30, 2024

	<u>Beginning Balance</u>	<u>M.T.D. Changes</u>	<u>Ending Balance</u>
<hr/> <b>Total All Funds</b> <hr/>			
<b><u>Assets</u></b>			
Cash on Hand - Petty Cash	205.35	0.00	205.35
Cash in Bank - Illinois National Bank	9.40	0.00	9.40
Cash on Hand - Cash Registers	344.14	0.00	344.14
Cash in Bank - Harris Bank Friends	6,835.68	(41.36)	6,794.32
Cash in Bank - Harris Bank Librarian	2,000.00	0.00	2,000.00
Cash in Bank - Harris Bank Comingled	285,390.94	84,055.40	369,446.34
Cash in Bank - Ehlers	15,483,728.52	61,240.30	15,544,968.82
Cash in Bank - Harris Bank MM	7,817,859.37	(567,091.45)	7,250,767.92
Cash in Bank - Ill Metropolitan	649,302.39	2,480.21	651,782.60
Property Taxes Receivable	5,979,656.92	0.00	5,979,656.92
Due from State	53,215.63	0.00	53,215.63
	<hr/> 30,278,548.34	<hr/> (419,356.90)	<hr/> 29,859,191.44
 <b>Liabilities and Fund Balance</b>			
<b><u>Liabilities</u></b>			
Accounts Payable	257,222.87	(37,973.81)	219,249.06
Employee I.M.R.F. Payable	9,021.59	136.73	9,158.32
Other Insurance Withholding Payable	(694.87)	694.87	0.00
Def Annuity Withholding Payable	(2,782.55)	0.00	(2,782.55)
Accrued Payroll	79,692.59	0.00	79,692.59
Deferred Property Taxes	5,979,656.92	0.00	5,979,656.92
Deferred Revenue - Per Capita Grant	53,017.47	0.00	53,017.47
	<hr/> 6,375,134.02	<hr/> (37,142.21)	<hr/> 6,337,991.81
 <b><u>Fund Balance</u></b>			
Reserved - F.I.C.A.	(408,850.99)	0.00	(408,850.99)
Reserved - I.M.R.F.	144,313.11	0.00	144,313.11
Reserved - Unemployment Comp.	14,873.10	0.00	14,873.10
Reserved - Liability Insurance	11,717.53	0.00	11,717.53
Reserved - Audit	8,956.00	0.00	8,956.00
Reserved - Workers Comp	20,608.18	0.00	20,608.18
Reserved - Per Capita Grant	188,607.47	0.00	188,607.47
Unreserved Fund Balance	3,197,829.81	0.00	3,197,829.81
Reserved for Capital Projects	17,346,830.84	0.00	17,346,830.84
	<hr/> 20,524,885.05	<hr/> 0.00	<hr/> 20,524,885.05
<b>Total Liabilities &amp; Fund Balance</b>	<hr/> <b>26,900,019.07</b>	<hr/> <b>(37,142.21)</b>	<hr/> <b>26,862,876.86</b>
<b>Excess Revenues Over Expenditures</b>	<hr/> <b>3,378,529.27</b>	<hr/> <b>(382,214.69)</b>	<hr/> <b>2,996,314.58</b>

## Addison Public Library Balance Sheet as of November 30, 2024

	<u>Beginning Balance</u>	<u>M.T.D. Changes</u>	<u>Ending Balance</u>
<b>General Capital Assets Fund</b>			
<b><u>Assets</u></b>			
95-14-0400 - Building Improvements	1,060,653.18	0.00	1,060,653.18
95-14-0410 - Construction in Progress	544,034.00	0.00	544,034.00
95-14-0450 - Books and Materials	3,316,608.82	0.00	3,316,608.82
95-14-0480 - Office Equipment	<u>1,169,651.00</u>	<u>0.00</u>	<u>1,169,651.00</u>
	<u>6,090,947.00</u>	<u>0.00</u>	<u>6,090,947.00</u>
<b>Liabilities and Fund Balance</b>			
<b><u>Liabilities</u></b>			
95-20-1000 - Accumulated Depreciation	<u>2,560,408.00</u>	<u>0.00</u>	<u>2,560,408.00</u>
	<u>2,560,408.00</u>	<u>0.00</u>	<u>2,560,408.00</u>
<b><u>Net Capital Assets</u></b>			
95-30-0600 - Net Capital Assets	<u>3,530,539.00</u>	<u>0.00</u>	<u>3,530,539.00</u>
	<u>3,530,539.00</u>	<u>0.00</u>	<u>3,530,539.00</u>
<b>Total Liabilities and Net Capital Assets</b>	<u><u>6,090,947.00</u></u>	<u><u>0.00</u></u>	<u><u>6,090,947.00</u></u>

# Addison Public Library Revenue Report For the 7 Months Ended November 30, 2024

<u>General Fund</u>	<u>Received this Month</u>	<u>Received this Year</u>	<u>Budgeted Receipts</u>	<u>Uncollected Receipts</u>	<u>Prct. Collected</u>
<b><u>Taxes</u></b>					
10-41-3201 - Property Current - General	48,839.73	5,225,001.04	5,292,463.18	67,462.14	98.73
10-41-3202 - Property Current - F.I.C.A.	2,641.13	282,555.01	286,203.19	3,648.18	98.73
10-41-3203 - Property Current - I.M.R.F.	2,782.37	297,664.92	301,508.17	3,843.25	98.73
10-41-3205 - Property Current - Liability Insurance	564.95	60,439.57	61,219.93	780.36	98.73
10-41-3206 - Property Current - Audit	70.62	7,554.94	7,652.49	97.55	98.73
10-41-3207 - Property Current - Unemployment	42.38	4,532.97	4,591.49	58.52	98.73
10-41-3208 - Property Current - Workers Compensation	42.38	4,532.97	4,591.49	58.52	98.73
10-41-3301 - Replacement Taxes	0.00	48,766.78	100,000.00	51,233.22	48.77
10-41-3400 - Aggregate Refunds	<u>197.73</u>	<u>21,153.85</u>	<u>21,426.98</u>	<u>273.13</u>	<u>98.73</u>
	<u>55,181.29</u>	<u>5,952,202.05</u>	<u>6,079,656.92</u>	<u>127,454.87</u>	<u>97.90</u>
<b><u>Fines &amp; Fees</u></b>					
10-42-3010 - Fines	366.70	3,861.02	5,000.00	1,138.98	77.22
10-42-3011 - Reciprocal Borrowing Reimbursements	0.00	1,322.28	1,000.00	(322.28)	132.23
10-42-3012 - Nonresident Fees	584.27	1,811.62	3,500.00	1,688.38	51.76
10-42-3016 - Scanner Fees	926.05	5,843.14	6,500.00	656.86	89.89
10-42-3023 - Activity Fees	0.00	825.30	0.00	(825.30)	0.00
10-42-3099 - Printing and Other Fees	<u>564.00</u>	<u>3,973.10</u>	<u>5,000.00</u>	<u>1,026.90</u>	<u>79.46</u>
	<u>2,441.02</u>	<u>17,636.46</u>	<u>21,000.00</u>	<u>3,363.54</u>	<u>83.98</u>
<b><u>Intergovernmental</u></b>					
10-43-3004 - Per Capita Grant - Current Year	0.00	53,017.47	52,660.00	(357.47)	100.68
10-43-3009 - Other Grants	0.00	300.00	0.00	(300.00)	0.00
10-43-3016 - Pathways to Success Grant	<u>0.00</u>	<u>2,000.00</u>	<u>0.00</u>	<u>(2,000.00)</u>	<u>0.00</u>
	<u>0.00</u>	<u>55,317.47</u>	<u>52,660.00</u>	<u>(2,657.47)</u>	<u>105.05</u>
<b><u>Interest</u></b>					
10-46-3028 - Other Interest Income	6,268.39	43,195.73	20,000.00	(23,195.73)	215.98
10-46-3029 - Interest on TD Ameritrade	<u>61,240.30</u>	<u>482,167.46</u>	<u>300,000.00</u>	<u>(182,167.46)</u>	<u>160.72</u>
	<u>67,508.69</u>	<u>525,363.19</u>	<u>320,000.00</u>	<u>(205,363.19)</u>	<u>164.18</u>
<b><u>Miscellaneous</u></b>					
10-47-3014 - Donations	657.40	(497.58)	100.00	597.58	(497.58)
10-47-3024 - Other Income	191.24	2,591.31	2,500.00	(91.31)	103.65
10-47-3030 - Friends of Addison Public Library	460.64	2,484.06	7,500.00	5,015.94	33.12
10-47-3031 - Friends Hispanic Program	<u>0.00</u>	<u>0.00</u>	<u>450.00</u>	<u>450.00</u>	<u>0.00</u>
	<u>1,309.28</u>	<u>4,577.79</u>	<u>10,550.00</u>	<u>5,972.21</u>	<u>43.39</u>
Total Non-Tax Revenues	<u>71,258.99</u>	<u>602,894.91</u>	<u>404,210.00</u>	<u>(198,684.91)</u>	<u>149.15</u>
Total General Fund Revenues	<u>126,440.28</u>	<u>6,555,096.96</u>	<u>6,483,866.92</u>	<u>(71,230.04)</u>	<u>101.10</u>

**Addison Public Library  
Revenue Report  
For the 7 Months Ended November 30, 2024**

	<u>Received this Month</u>	<u>Received this Year</u>	<u>Budgeted Receipts</u>	<u>Uncollected Receipts</u>	<u>Prct. Collected</u>
<u>Capital Improvement Fund</u>					
<b><u>Other</u></b>					
80-46-3029 - Interest on IMET	2,480.21	20,899.34	20,000.00	(899.34)	104.50
80-47-3019 - Capital Donations	<u>0.00</u>	<u>0.00</u>	<u>100,000.00</u>	<u>100,000.00</u>	<u>0.00</u>
	<u>2,480.21</u>	<u>20,899.34</u>	<u>120,000.00</u>	<u>99,100.66</u>	<u>17.42</u>
<b><u>Transfers</u></b>					
Total Capital Improvement Fund Revenues	<u>2,480.21</u>	<u>20,899.34</u>	<u>120,000.00</u>	<u>99,100.66</u>	<u>17.42</u>
<u>Rebillables Fund</u>					
<b><u>Miscellaneous</u></b>					
Total All Funds	<u>128,920.49</u>	<u>6,575,996.30</u>	<u>6,603,866.92</u>	<u>27,870.62</u>	<u>99.58</u>

# Addison Public Library Expense Report For the 7 Months Ended November 30, 2024

	<u>M.T.D.</u> <u>Expended</u>	<u>Y.T.D.</u> <u>Expended</u>	<u>Budgeted</u> <u>Amount</u>	<u>Budgeted</u> <u>Remain.</u>	<u>Prct.</u> <u>Expend.</u>	<u>Prct.</u> <u>Remain.</u>
<b><u>General Fund</u></b>						
<b><u>Staffing</u></b>						
10-50-1100 - Staff Salaries and Wages	225,708.31	1,669,970.66	3,440,882.00	1,770,911.34	48.53	51.47
10-50-2200 - Employer F.I.C.A. Expense	16,988.92	125,855.44	263,228.00	137,372.56	47.81	52.19
10-50-2300 - Employer I.M.R.F. Expense	12,975.15	83,546.46	180,710.00	97,163.54	46.23	53.77
10-50-2400 - Health Insurance	37,625.37	261,396.34	513,175.00	251,778.66	50.94	49.06
10-50-2450 - Employee Assistance Program	0.00	3,412.50	3,420.00	7.50	99.78	0.22
10-50-2500 - Recruiting	<u>0.00</u>	<u>0.00</u>	<u>1,000.00</u>	<u>1,000.00</u>	<u>0.00</u>	<u>100.00</u>
	<u>293,297.75</u>	<u>2,144,181.40</u>	<u>4,402,415.00</u>	<u>2,258,233.60</u>	<u>48.70</u>	<u>51.30</u>
<b><u>Library Materials</u></b>						
<b><u>Children Services</u></b>						
10-52-3100 - Children Books	3,988.62	36,571.00	71,000.00	34,429.00	51.51	48.49
10-52-3900 - Children Other Expenditures	<u>2,371.37</u>	<u>15,506.25</u>	<u>28,000.00</u>	<u>12,493.75</u>	<u>55.38</u>	<u>44.62</u>
	<u>6,359.99</u>	<u>52,077.25</u>	<u>99,000.00</u>	<u>46,922.75</u>	<u>52.60</u>	<u>47.40</u>
<b><u>Adult Services</u></b>						
10-54-3110 - Adult Books	11,866.14	85,423.67	167,000.00	81,576.33	51.15	48.85
10-54-3900 - Adult Other Expenditures	<u>9,116.47</u>	<u>41,824.47</u>	<u>88,000.00</u>	<u>46,175.53</u>	<u>47.53</u>	<u>52.47</u>
	<u>20,982.61</u>	<u>127,248.14</u>	<u>255,000.00</u>	<u>127,751.86</u>	<u>49.90</u>	<u>50.10</u>
<b><u>Other Library Materials</u></b>						
10-55-3400 - Magazines/News	414.95	9,159.09	10,500.00	1,340.91	87.23	12.77
10-55-3500 - Online Databases	29,135.00	138,339.53	223,000.00	84,660.47	62.04	37.96
10-55-3860 - E-Books	659.57	37,002.08	75,000.00	37,997.92	49.34	50.66
10-55-3900 - Other Digital Media	<u>419.00</u>	<u>4,719.00</u>	<u>46,000.00</u>	<u>41,281.00</u>	<u>10.26</u>	<u>89.74</u>
	<u>30,628.52</u>	<u>189,219.70</u>	<u>354,500.00</u>	<u>165,280.30</u>	<u>53.38</u>	<u>46.62</u>
Total Library Materials	<u>57,971.12</u>	<u>368,545.09</u>	<u>708,500.00</u>	<u>339,954.91</u>	<u>52.02</u>	<u>47.98</u>
<b><u>General Contractual Services</u></b>						
10-56-4100 - Legal Fees	395.78	4,211.55	12,000.00	7,788.45	35.10	64.90
10-56-4410 - Collection Agency Fees	396.10	1,920.15	3,500.00	1,579.85	54.86	45.14
10-56-4420 - Equipment Rental & Leasing	0.00	2,816.58	4,000.00	1,183.42	70.41	29.59
10-56-4450 - Accounting Service Fees	2,080.00	14,630.00	23,830.00	9,200.00	61.39	38.61
10-56-4500 - Payroll Service Fees	4,589.66	27,383.48	56,210.00	28,826.52	48.72	51.28
10-56-4600 - Audit Service Fees	0.00	6,798.00	6,798.00	0.00	100.00	0.00
10-56-4900 - Other Contracts	<u>3,480.00</u>	<u>25,227.62</u>	<u>60,000.00</u>	<u>34,772.38</u>	<u>42.05</u>	<u>57.95</u>
	<u>10,941.54</u>	<u>82,987.38</u>	<u>166,338.00</u>	<u>83,350.62</u>	<u>49.89</u>	<u>50.11</u>

# Addison Public Library Expense Report For the 7 Months Ended November 30, 2024

	<u>M.T.D.</u> <u>Expended</u>	<u>Y.T.D.</u> <u>Expended</u>	<u>Budgeted</u> <u>Amount</u>	<u>Budgeted</u> <u>Remain.</u>	<u>Prct.</u> <u>Expend.</u>	<u>Prct.</u> <u>Remain.</u>
<b><u>Physical Services</u></b>						
<b><u>Utilities and Services</u></b>						
10-58-5100 - Natural Gas Service	1,127.15	6,694.23	28,000.00	21,305.77	23.91	76.09
10-58-5120 - Water Service	0.00	1,774.08	4,000.00	2,225.92	44.35	55.65
10-58-5310 - Refuse Disposal Service	399.73	2,198.38	4,265.00	2,066.62	51.54	48.46
10-58-5320 - Cleaning Service	<u>5,400.00</u>	<u>43,200.00</u>	<u>77,000.00</u>	<u>33,800.00</u>	<u>56.10</u>	<u>43.90</u>
	<u>6,926.88</u>	<u>53,866.69</u>	<u>113,265.00</u>	<u>59,398.31</u>	<u>47.56</u>	<u>52.44</u>
<b><u>Telecommunications</u></b>						
10-58-5510 - Telephone	177.45	4,112.47	11,500.00	7,387.53	35.76	64.24
10-58-5570 - Leased Internet Access Line	<u>500.19</u>	<u>3,664.31</u>	<u>7,500.00</u>	<u>3,835.69</u>	<u>48.86</u>	<u>51.14</u>
	<u>677.64</u>	<u>7,776.78</u>	<u>19,000.00</u>	<u>11,223.22</u>	<u>40.93</u>	<u>59.07</u>
<b><u>Maintenance and Repair</u></b>						
10-58-5610 - Building Supplies	1,316.79	23,984.24	45,000.00	21,015.76	53.30	46.70
10-58-5620 - HVAC	2,954.29	9,140.55	35,000.00	25,859.45	26.12	73.88
10-58-5690 - Other Building Materials & Repair	146.90	3,333.76	15,000.00	11,666.24	22.23	77.77
10-58-5710 - Equipment Maintenance & Repair	<u>(1,033.18)</u>	<u>22,657.49</u>	<u>85,000.00</u>	<u>62,342.51</u>	<u>26.66</u>	<u>73.34</u>
	<u>3,384.80</u>	<u>59,116.04</u>	<u>180,000.00</u>	<u>120,883.96</u>	<u>32.84</u>	<u>67.16</u>
Total Physical Services	<u>10,989.32</u>	<u>120,759.51</u>	<u>312,265.00</u>	<u>191,505.49</u>	<u>38.67</u>	<u>61.33</u>
<b><u>Automation</u></b>						
10-61-4800 - System Development	6,500.00	25,500.00	49,000.00	23,500.00	52.04	47.96
10-61-6100 - ILS Services	0.00	30,144.00	67,000.00	36,856.00	44.99	55.01
10-61-6200 - Software/Licenses	<u>1,308.24</u>	<u>47,976.96</u>	<u>100,000.00</u>	<u>52,023.04</u>	<u>47.98</u>	<u>52.02</u>
	<u>7,808.24</u>	<u>103,620.96</u>	<u>216,000.00</u>	<u>112,379.04</u>	<u>47.97</u>	<u>52.03</u>
<b><u>Continuing Education</u></b>						
10-62-7410 - Administration	0.00	879.00	3,500.00	2,621.00	25.11	74.89
10-62-7420 - Information Technology	0.00	334.74	1,600.00	1,265.26	20.92	79.08
10-62-7430 - Guest Services	0.00	910.00	1,500.00	590.00	60.67	39.33
10-62-7440 - Adult Services	288.40	1,596.77	2,500.00	903.23	63.87	36.13
10-62-7450 - Children Services	0.00	655.00	1,200.00	545.00	54.58	45.42
10-62-7455 - Teen Services	0.00	651.65	1,200.00	548.35	54.30	45.70
10-62-7460 - Materials Management	526.98	1,776.98	2,700.00	923.02	65.81	34.19
10-62-7470 - Staff In-Service	0.00	2,028.83	7,500.00	5,471.17	27.05	72.95
10-62-7480 - Board	0.00	410.00	2,500.00	2,090.00	16.40	83.60
10-62-7500 - Community Engagement	354.05	1,204.68	2,115.00	910.32	56.96	43.04
10-62-7510 - Memberships (Staff & Board)	760.00	4,738.00	11,000.00	6,262.00	43.07	56.93
10-62-7550 - In-State Travel	743.63	7,967.31	13,800.00	5,832.69	57.73	42.27
10-62-7560 - Out-of-State Travel	514.48	1,916.55	6,500.00	4,583.45	29.49	70.51
10-62-7600 - Tuition Reimbursement	<u>0.00</u>	<u>0.00</u>	<u>6,500.00</u>	<u>6,500.00</u>	<u>0.00</u>	<u>100.00</u>
	<u>3,187.54</u>	<u>25,069.51</u>	<u>64,115.00</u>	<u>39,045.49</u>	<u>39.10</u>	<u>60.90</u>

# Addison Public Library Expense Report For the 7 Months Ended November 30, 2024

	<u>M.T.D.</u> <u>Expended</u>	<u>Y.T.D.</u> <u>Expended</u>	<u>Budgeted</u> <u>Amount</u>	<u>Budgeted</u> <u>Remain.</u>	<u>Prct.</u> <u>Expend.</u>	<u>Prct.</u> <u>Remain.</u>
<b><u>Programs</u></b>						
10-64-8100 - Adult Services Programs	1,306.22	10,255.25	28,000.00	17,744.75	36.63	63.37
10-64-8120 - Children Services Programs - General	3,099.01	7,447.77	17,000.00	9,552.23	43.81	56.19
10-64-8160 - Teen Program	59.77	6,584.28	19,000.00	12,415.72	34.65	65.35
10-64-8165 - Community Engagement Program	560.76	2,003.38	5,075.00	3,071.62	39.48	60.52
10-64-8170 - IT Programs	<u>121.68</u>	<u>3,604.91</u>	<u>6,500.00</u>	<u>2,895.09</u>	<u>55.46</u>	<u>44.54</u>
	<u>5,147.44</u>	<u>29,895.59</u>	<u>75,575.00</u>	<u>45,679.41</u>	<u>39.56</u>	<u>60.44</u>
<b><u>PR/Marketing</u></b>						
10-64-8210 - Newsletter	1,000.00	27,357.57	52,350.00	24,992.43	52.26	47.74
10-64-8220 - Flyers/Brochures	0.00	5,714.95	15,150.00	9,435.05	37.72	62.28
10-64-8910 - Other Promotions	<u>597.90</u>	<u>12,257.58</u>	<u>62,000.00</u>	<u>49,742.42</u>	<u>19.77</u>	<u>80.23</u>
	<u>1,597.90</u>	<u>45,330.10</u>	<u>129,500.00</u>	<u>84,169.90</u>	<u>35.00</u>	<u>65.00</u>
<b><u>Other Operating Expenses</u></b>						
<b><u>Supplies</u></b>						
10-66-9210 - Office Supplies	281.56	1,722.71	7,500.00	5,777.29	22.97	77.03
10-66-9220 - Guest Services Supplies	1,835.18	2,879.19	5,500.00	2,620.81	52.35	47.65
10-66-9230 - Adult Services Supplies	128.89	689.08	1,000.00	310.92	68.91	31.09
10-66-9240 - Children Services Supplies	468.22	1,601.08	3,000.00	1,398.92	53.37	46.63
10-66-9245 - Teen Services Supplies	30.00	349.49	1,000.00	650.51	34.95	65.05
10-66-9250 - Materials Management Supplies	774.39	11,876.93	35,000.00	23,123.07	33.93	66.07
10-66-9270 - Information Technology Supplies	2,057.33	20,455.75	27,000.00	6,544.25	75.76	24.24
10-66-9290 - Postage	1,000.00	3,022.92	10,000.00	6,977.08	30.23	69.77
10-66-9300 - Library Wide Supplies	762.38	4,798.49	11,000.00	6,201.51	43.62	56.38
10-66-9330 - Community Engagement Supplies	<u>128.73</u>	<u>2,455.49</u>	<u>4,320.00</u>	<u>1,864.51</u>	<u>56.84</u>	<u>43.16</u>
	<u>7,466.68</u>	<u>49,851.13</u>	<u>105,320.00</u>	<u>55,468.87</u>	<u>47.33</u>	<u>52.67</u>
<b><u>Insurance</u></b>						
10-66-9510 - Unemployment Compensation Insurance	0.00	864.41	5,000.00	4,135.59	17.29	82.71
10-66-9520 - Workers' Compensation Insurance	0.00	10,867.00	10,867.00	0.00	100.00	0.00
10-66-9530 - Liability Insurance	<u>0.00</u>	<u>51,546.00</u>	<u>55,500.00</u>	<u>3,954.00</u>	<u>92.88</u>	<u>7.12</u>
	<u>0.00</u>	<u>63,277.41</u>	<u>71,367.00</u>	<u>8,089.59</u>	<u>88.66</u>	<u>11.34</u>
<b><u>Grant Expenses</u></b>						
10-66-9840 - Per Capita Grant - Current Year	0.00	2,925.00	52,660.00	49,735.00	5.55	94.45
10-66-9850 - Per Capita Grant - Prior Year	<u>4,467.41</u>	<u>18,439.32</u>	<u>36,321.86</u>	<u>17,882.54</u>	<u>50.77</u>	<u>49.23</u>
	<u>4,467.41</u>	<u>21,364.32</u>	<u>88,981.86</u>	<u>67,617.54</u>	<u>24.01</u>	<u>75.99</u>

**Addison Public Library  
Expense Report  
For the 7 Months Ended November 30, 2024**

	<u>M.T.D. Expended</u>	<u>Y.T.D. Expended</u>	<u>Budgeted Amount</u>	<u>Budgeted Remain.</u>	<u>Prct. Expend.</u>	<u>Prct. Remain.</u>
<b><u>Other Expenses</u></b>						
10-66-9910 - Hardware	1,537.96	24,520.35	50,000.00	25,479.65	49.04	50.96
10-66-9920 - Furniture and Equipment	271.64	2,779.49	10,000.00	7,220.51	27.79	72.21
10-66-9930 - Reciprocal Borrowing Expense	100.00	115.00	1,000.00	885.00	11.50	88.50
10-66-9940 - Cable Broadcast	400.00	3,200.00	4,800.00	1,600.00	66.67	33.33
10-66-9950 - Donations	449.24	699.24	0.00	(699.24)	0.00	100.00
10-66-9951 - Friends Hispanic Program	119.80	119.80	450.00	330.20	26.62	73.38
10-66-9960 - Friends of the Library	613.85	2,222.48	7,500.00	5,277.52	29.63	70.37
10-66-9970 - FUNshine Committee	270.39	1,293.00	4,500.00	3,207.00	28.73	71.27
10-66-9980 - Staff Recognition	111.94	1,964.54	9,100.00	7,135.46	21.59	78.41
	<u>3,874.82</u>	<u>36,913.90</u>	<u>87,350.00</u>	<u>50,436.10</u>	<u>42.26</u>	<u>57.74</u>
<b><u>Transfers</u></b>						
Total Other Operating Expenses	<u>15,808.91</u>	<u>171,406.76</u>	<u>353,018.86</u>	<u>181,612.10</u>	<u>48.55</u>	<u>51.45</u>
Total General Fund Expenditures	<u>406,749.76</u>	<u>3,091,796.30</u>	<u>6,427,726.86</u>	<u>3,335,930.56</u>	<u>48.10</u>	<u>51.90</u>
<b><u>Capital Improvement Fund</u></b>						
<b><u>Asset Replacement</u></b>						
80-55-1900 - Asset Replacement Expense	0.00	0.00	300,000.00	300,000.00	0.00	100.00
80-55-1905 - Renovation Project	<u>104,385.42</u>	<u>487,885.42</u>	<u>10,000,000.00</u>	<u>9,512,114.58</u>	<u>4.88</u>	<u>95.12</u>
	<u>104,385.42</u>	<u>487,885.42</u>	<u>10,300,000.00</u>	<u>9,812,114.58</u>	<u>4.74</u>	<u>95.26</u>
<b><u>RFID Project</u></b>						
80-65-1940 - RFID Project	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>100.00</u>
Total Capital Improvement Fund Expenditures	<u>104,385.42</u>	<u>487,885.42</u>	<u>10,300,000.00</u>	<u>9,812,114.58</u>	<u>4.74</u>	<u>95.26</u>
<b><u>Rebillables Fund</u></b>						
90-50-5900 - Personal Orders	0.00	0.00	0.00	0.00	0.00	100.00
90-50-5950 - Interlibrary Loans, etc.	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>100.00</u>
Total All Funds	<u>511,135.18</u>	<u>3,579,681.72</u>	<u>16,727,726.86</u>	<u>13,148,045.14</u>	<u>21.40</u>	<u>78.60</u>

## Addison Public Library Check Register

All Bank Accounts  
November 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
<b>Vendor Checks</b>						
Addison Public Library 500004 10-66-9960	Friends of the Library	Addison Public Library 500004	477.00	1297	11/30/24	<u>477.00</u>
ADP, LLC #110146 10-56-4500 10-56-4500	Payroll Service Fees Payroll Service Fees	Inv #674806545 Inv #674806377	4,208.86 380.80	21549	11/12/24	<u>4,589.66</u>
Albertsons - Safeway 112213 10-66-9970 10-64-8160 10-64-8160 10-66-9950 10-64-8100 10-64-8100 10-64-8120 10-66-9980	FUNshine Committee Teen Program Teen Program Donations Adult Services Programs Adult Services Programs Children Services Programs - General Staff Recognition	11/05/24 Drinks & Veggie Tray 10/18/24 Escape Room/Snack Tase the World 10/23/24 11/04/24 FOL HHM 10/17/24 Pumpkin Pies 10/23/24 Various pasta/coffee 10/21/24 10/31/24	54.44 46.02 61.97 25.40 45.83 44.15 143.17 61.95	21550	11/12/24	<u>482.93</u>
Comcast 132554 10-58-5570	Leased Internet Access Line	Inv #221630268	398.07	21551	11/12/24	<u>398.07</u>
Nicor Gas 241916 10-58-5100	Natural Gas Service	Acct #66-89-55-1902 4	1,127.15	21552	11/12/24	<u>1,127.15</u>
Republic Services #551 122869 10-58-5310	Refuse Disposal Service	Acct #3-0551-3000027	399.73	21553	11/12/24	<u>399.73</u>
Educate Station LLC 151487 10-55-3500	Online Databases	Inv #1259	400.00	21554	11/14/24	<u>400.00</u>
Three Bees Honey Farms, LLC 301509 10-64-8100	Adult Services Programs	Sweet as Honey Program 11/16/24	297.00	21555	11/14/24	<u>297.00</u>
Andrea Naranjo 10-64-8100	Adult Services Programs	11/26/24 Read & Write Spanish Program	325.00	21556	11/20/24	<u>325.00</u>
Andrea Naranjo 10-64-8100	Adult Services Programs	12/5/24 Read & Write Spanish Program	325.00	21557	11/20/24	<u>325.00</u>

## Addison Public Library Check Register

All Bank Accounts  
November 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Mission Square 231901 10-22-0260	Def Annuity Withholding Payable	Mission Square Plan #306740	2,657.55	21558	11/20/24	<u>2,657.55</u>
Quill 273145 10-66-9300	Library Wide Supplies	Inv #41278369	74.97	21559	11/20/24	<u>74.97</u>
Verizon 10-58-5570	Leased Internet Access Line	Inv #9978108771	102.12	21560	11/20/24	<u>102.12</u>
Village of Addison - HSA 10-50-2400	Health Insurance	EE & ER HSA Contribution for 11/20/24 Payroll	2,691.59	21561	11/20/24	<u>2,691.59</u>
Village of Addison: Misc Exp 500010 10-22-0255	Other Insurance Withholding Payable	Allstate ID Protection December 2024	103.60	21562	11/25/24	<u>103.60</u>
Village of Addison: Misc Exp 500010 10-22-0255	Other Insurance Withholding Payable	MetLife Hyatt Legal - December 2024	110.00	21563	11/25/24	<u>110.00</u>
Village of Addison: Misc Exp 500010 10-22-0255	Other Insurance Withholding Payable	Standard Misc - December 2024	637.87	21564	11/25/24	<u>637.87</u>
Village of Addison: Misc Exp 500010 10-22-0255	Other Insurance Withholding Payable	Standard Self Bill - December 2024	777.82	21565	11/25/24	<u>777.82</u>
Village of Addison:Health Ins 500011 10-50-2400	Health Insurance	BCBS Decembwer 2024	30,287.55	21566	11/25/24	<u>30,287.55</u>
Village of Addison:Health Ins 500011 10-50-2400	Health Insurance	Delta Dental December 2024	2,180.85	21567	11/25/24	<u>2,180.85</u>
Village of Addison:Health Ins 500011 10-50-2400	Health Insurance	VSP December 2024	303.36	21568	11/25/24	<u>303.36</u>
4imprint, Inc. 162600 10-66-9850	Per Capita Grant - Prior Year	INV 13195756	2,389.21	38826	12/05/24	<u>2,389.21</u>
Amazon Capital Services 112300 10-66-9950	Donations	INV 144K-NCP3-7LQY	16.99	38827	12/05/24	<u>429.00</u>
10-52-3100	Children Books	INV 1YLG-LTV9-733C	36.94			

## Addison Public Library Check Register

All Bank Accounts  
November 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-52-3100	Children Books	INV 1YT3-MYGQ-1WJY	17.61			
10-52-3900	Children Other Expenditures	INV 19K4-V41K-7DQD	26.49			
10-52-3900	Children Other Expenditures	INV 17LP-3HDR-7FP7	20.00			
10-54-3110	Adult Books	INV 1PWR-H79C-DWGX	28.00			
10-54-3110	Adult Books	INV 136H-YDK9-DP79	49.48			
10-54-3110	Adult Books	INV 1VM1-7R6X-DFG3	24.95			
10-54-3900	Adult Other Expenditures	INV 1GPC-PK79-6HH3	77.98			
10-54-3900	Adult Other Expenditures	INV 1DFH-7TNG-6CCV	27.99			
10-66-9850	Per Capita Grant - Prior Year	INV 199T-JHRJ-FV1R	24.58			
10-66-9850	Per Capita Grant - Prior Year	INV 1VX1-HDTP-FMPC	77.99			
Amazon Capital Services 112300				38828	12/05/24	<u>1,046.35</u>
10-66-9210	Office Supplies	INV 1KJL-J66X-4FPY	58.49			
10-66-9300	Library Wide Supplies	INV 19P3-VKL7-QRC7	206.77			
10-64-8100	Adult Services Programs	INV 1FMD-YXVW-R3FJ	40.25			
10-64-8120	Children Services Programs - General	INV 1Y1C-K1PQ-1P7P	190.61			
10-54-3110	Adult Books	INV 1NVP-9HX7-NHTT	74.12			
10-54-3110	Adult Books	INV 1JGP-XHTC-1PM4	14.99			
10-54-3900	Adult Other Expenditures	INV 1P1D-NYJK-PF7F	59.81			
10-66-9220	Guest Services Supplies	INV 1FD1-G73Y-1HWX	18.99			
10-66-9250	Materials Management Supplies	INV 1FD1-G73Y-1HWX	7.99			
10-66-9250	Materials Management Supplies	INV 11XR-VT6L-3DPF	12.99			
10-66-9920	Furniture and Equipment	INV 114F-V1GH-MM9H	271.64			
10-64-8170	IT Programs	INV 1DP6-HM69-1NF3	89.70			
Amazon Capital Services 112300				38829	12/05/24	<u>1,357.70</u>
10-64-8120	Children Services Programs - General	INV 11YG-XD3W-QJ1N	661.14			
10-52-3100	Children Books	INV 11YG-XD3W-QWNX	11.19			
10-52-3100	Children Books	INV 1CXG-3FMH-RHMD	26.48			
10-52-3100	Children Books	INV 1YG4-9LK7-RRPG	13.99			
10-52-3100	Children Books	INV 1VD1-94W9-RRD9	29.99			
10-52-3900	Children Other Expenditures	INV 1RWT-G4PF-PXXY	12.61			
10-52-3900	Children Other Expenditures	INV 1CDR-916G-PWFJ	59.94			
10-54-3110	Adult Books	INV 1XMN-XTGY-PXGV	10.11			
10-54-3110	Adult Books	INV 1HM4-NHHM-R63H	142.89			
10-54-3110	Adult Books	INV 1TM7-6FNG-NYFW	175.49			
10-66-9240	Children Services Supplies	INV 19Y3-QQ93-QXYV	120.90			
10-66-9330	Community Engagement Supplies	INV 1KLX-71L7-P3JK	92.97			
Amazon Capital Services 112300				38830	12/05/24	<u>283.18</u>
10-52-3900	Children Other Expenditures	INV 1Y9P-NQYP-TCMC	45.66			
10-54-3110	Adult Books	INV 11NV-LQQD-NXHC	187.53			

## Addison Public Library Check Register

All Bank Accounts  
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Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-66-9980	Staff Recognition	INV 1P1D-NYJK-QWJ6	49.99			
BMO Harris Bank N.A. 22301				38831	12/05/24	8,670.02
10-66-9210	Office Supplies	Sam's Club	56.82			
10-64-8910	Other Promotions	Otter Promotions	309.66			
10-61-6200	Software/Licenses	ScreenConnect	39.00			
10-61-6200	Software/Licenses	AutoElevate	87.50			
10-61-6200	Software/Licenses	Zoho Corp	123.50			
10-61-6200	Software/Licenses	ScreenConnect	36.00			
10-61-6200	Software/Licenses	Adobe	330.67			
10-61-6200	Software/Licenses	Cyber Fox	39.66			
10-61-6200	Software/Licenses	Zoom	15.99			
10-61-6200	Software/Licenses	Zoho Corp	155.00			
10-61-6200	Software/Licenses	Lightspeed	141.75			
10-66-9970	FUNshine Committee	Raco 'bout it	14.92			
10-66-9970	FUNshine Committee	Funshine Lunch	18.03			
10-66-9300	Library Wide Supplies	Home Depot	14.87			
10-64-8160	Teen Program	Sam's Club	74.03			
10-66-9950	Donations	Sam's Club	194.15			
10-66-9950	Donations	Sam's Club	16.98			
10-66-9950	Donations	Party City	119.93			
10-66-9950	Donations	Michael's	75.79			
10-64-8100	Adult Services Programs	Michael's	53.06			
10-64-8100	Adult Services Programs	Walmart	-22.99			
10-64-8100	Adult Services Programs	Sam's Club	74.03			
10-58-5610	Building Supplies	Grainger	309.05			
10-58-5610	Building Supplies	Home Depot	94.89			
10-54-3900	Adult Other Expenditures	Mobile Beacon	1,860.00			
10-55-3400	Magazines/News	iClub	299.00			
10-55-3900	Other Digital Media	Nate's Notes	419.00			
10-58-5510	Telephone	Tracfone	108.49			
10-58-5620	HVAC	Apex Controls	424.29			
10-58-5690	Other Building Materials & Repair	Pittsburg Water Cooler	146.90			
10-62-7440	Adult Services	Evenbrite Refund	-200.00			
10-62-7440	Adult Services	Wild Things	88.40			
10-62-7440	Adult Services	ARRT Con	400.00			
10-62-7460	Materials Management	Library Jorunal	251.94			
10-62-7460	Materials Management	Library Journal	275.04			
10-62-7560	Out-of-State Travel	Hyatt	398.62			
10-66-9240	Children Services Supplies	Walmart	140.82			
10-66-9270	Information Technology Supplies	Monoprice	94.94			
10-66-9270	Information Technology Supplies	Monoprice	206.08			

## Addison Public Library Check Register

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Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-66-9850	Per Capita Grant - Prior Year	Sticker Mule	970.00			
10-66-9850	Per Capita Grant - Prior Year	HR Source	75.00			
10-66-9850	Per Capita Grant - Prior Year	Party City	38.14			
10-66-9850	Per Capita Grant - Prior Year	Cardio Partners	-150.45			
10-64-8165	Community Engagement Program	Michael's	30.76			
10-62-7500	Community Engagement	University of Wisconsin-Madison	325.00			
10-66-9330	Community Engagement Supplies	Sam's Club	35.76			
10-66-9951	Friends Hispanic Program	La Michoacana Premium	60.00			
Brigit Goudie 892136				38832	12/05/24	<u>200.00</u>
10-64-8120	Children Services Programs - General	Alphabet Palooza - 12/9/2024	200.00			
Business Office Systems 123175				38833	12/05/24	<u>27,429.06</u>
80-55-1905	Renovation Project	Reassembly & installation of furniture	27,429.06			
CDS Office Technologies 131476				38834	12/05/24	<u>1,305.32</u>
10-58-5710	Equipment Maintenance & Repair	INV 1653709	438.32			
10-66-9270	Information Technology Supplies	INV 1654834	867.00			
CDW Government 131480				38835	12/05/24	<u>1,537.96</u>
10-66-9910	Hardware	INV AB33D8B	1,465.00			
10-66-9910	Hardware	INV AB38Y8E	72.96			
Center Point Publishing 131571				38836	12/05/24	<u>23.97</u>
10-54-3110	Adult Books	INV 2130434	23.97			
CMRS-FP 132402				38837	12/05/24	<u>1,000.00</u>
10-66-9290	Postage	Postage Meter	1,000.00			
Comcast 132548				38838	12/05/24	<u>68.96</u>
10-58-5510	Telephone	Acct #8771 20 183 0148973	68.96			
Crimson Multimedia Dist. 132835				38839	12/05/24	<u>1,955.19</u>
10-52-3900	Children Other Expenditures	INV 017463	262.12			
10-52-3900	Children Other Expenditures	INV 017459	30.00			
10-52-3900	Children Other Expenditures	INV 017462	125.00			
10-52-3900	Children Other Expenditures	INV 017658	306.23			
10-52-3900	Children Other Expenditures	INV 017461	150.00			
10-54-3900	Adult Other Expenditures	INV 017659	35.00			
10-54-3900	Adult Other Expenditures	INV 017660	167.19			
10-54-3900	Adult Other Expenditures	INV 017458	463.32			

**Addison Public Library  
Check Register**

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Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-54-3900	Adult Other Expenditures	INV 017460	416.33			
D&Z House of Books Inc 143662				38840	12/05/24	<u>422.96</u>
10-52-3100	Children Books	INV 2024/i000240	41.72			
10-52-3100	Children Books	INV 2024/i000236	39.32			
10-54-3110	Adult Books	INV 2024/i000238	341.92			
Demco Inc 141551				38841	12/05/24	<u>1,410.81</u>
10-66-9220	Guest Services Supplies	INV 7568718	1,410.81			
Elenco Electronics, Inc. 152240				38842	12/05/24	<u>58.80</u>
10-52-3900	Children Other Expenditures	INV 676475	58.80			
GALE/CENGAGE Learning 171152				38843	12/05/24	<u>589.29</u>
10-54-3110	Adult Books	INV 85939270	542.81			
10-54-3110	Adult Books	INV 85643669	46.48			
Grainger 333337				38844	12/05/24	<u>155.16</u>
10-58-5610	Building Supplies	INV 840452726	155.16			
Imperial Dade 192340				38845	12/05/24	<u>491.80</u>
10-58-5610	Building Supplies	INV 35867146	491.80			
Krystyna Jaroc 201175				38846	12/05/24	<u>400.00</u>
10-64-8120	Children Services Programs - General	Christmas Craft - 12/10/24	400.00			
Lakeshore Learning Material 221153				38847	12/05/24	<u>57.48</u>
10-52-3900	Children Other Expenditures	INV 257848110124	57.48			
Libraria 131861				38848	12/05/24	<u>2,514.23</u>
10-52-3100	Children Books	INV 253073	881.47			
10-52-3100	Children Books	INV 253072	1,602.02			
10-52-3100	Children Books	INV 252692	14.24			
10-66-9250	Materials Management Supplies	INV 253074	16.20			
10-66-9250	Materials Management Supplies	INV 252693	0.30			
Marti LaHood - 281914				38849	12/05/24	<u>80.00</u>
10-64-8100	Adult Services Programs	Chair Yoga - 12/12/24	80.00			
Mission Square 231901				38850	12/05/24	<u>2,657.55</u>
10-22-0260	Def Annuity Withholding Payable	Plan #306740 - 12/4/24 Payroll	2,657.55			

## Addison Public Library Check Register

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Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Muggs n Manor 233100 10-64-8165	Community Engagement Program	INV 991292	25.00	38851	12/05/24	<u>25.00</u>
NobleTec LLC 10-61-4800	System Development	INV C14651	6,500.00	38852	12/05/24	<u>6,500.00</u>
OTC Brands, Inc 252842 10-64-8160	Teen Program	INV 73441193401	22.12	38853	12/05/24	<u>118.29</u>
10-64-8100	Adult Services Programs	INV 73441193401	22.12			
10-66-9250	Materials Management Supplies	INV 73425482901	30.11			
10-66-9850	Per Capita Grant - Prior Year	INV 73407635501	43.94			
Quill 273145 10-66-9210	Office Supplies	INV 41402818	48.39	38854	12/05/24	<u>295.57</u>
10-66-9210	Office Supplies	INV 41382486	104.68			
10-66-9230	Adult Services Supplies	INV 41488610	82.70			
10-66-9951	Friends Hispanic Program	INV 41488610	59.80			
Scholastic Library Publishing 172866 10-55-3500	Online Databases	INV 65199334	2,314.00	38855	12/05/24	<u>2,314.00</u>
Team One Repair, Inc. 301514 10-66-9220	Guest Services Supplies	INV 1593780	390.00	38856	12/05/24	<u>390.00</u>
United States Postal Service 312448 10-64-8210	Newsletter	USPS - APL Newsletter	1,000.00	38857	12/05/24	<u>1,000.00</u>
Village of Addison - HSA 10-50-2400	Health Insurance	HSA Contributions (EE+ER) - 12/4/24 Payroll	2,691.43	38858	12/05/24	<u>2,691.43</u>
Village of Addison: Misc Exp 500010 10-56-4900	Other Contracts	INV 17402	40.00	38859	12/05/24	<u>40.00</u>
Welcome Wagon 331191 10-64-8910	Other Promotions	INV 135131-11	144.12	38860	12/05/24	<u>144.12</u>
Amazon Capital Services 112300 10-64-8100	Adult Services Programs	INV 179Q-JXQJ-V6DL	101.40	38861	12/17/24	<u>3,014.44</u>
10-64-8120	Children Services Programs - General	INV 139X-N9XF-NHWH	1,154.09			
10-52-3100	Children Books	INV 1VTF-4C4L-NLL6	145.86			
10-52-3900	Children Other Expenditures	INV 1NHL-P7DN-TKQP	19.99			

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Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-54-3110	Adult Books	INV 1VXV-LGNL-LKQ3	10.11			
10-54-3110	Adult Books	INV 17CQ-GF69-R179	-10.11			
10-54-3900	Adult Other Expenditures	INV 1VTF-4C4L-MGNP	927.65			
10-54-3900	Adult Other Expenditures	INV 1NHL-P7DN-TWJV	26.99			
10-54-3900	Adult Other Expenditures	INV 1VCD-DPGN-RLYG	399.98			
10-66-9240	Children Services Supplies	INV 19GT-Q7JK-TLMV	206.50			
10-64-8170	IT Programs	INV 1CDC-7T6T-QY9X	31.98			
American Library Association 10-62-7510	Memberships (Staff & Board)	Member #1272604	210.00	38862	12/17/24	<u>210.00</u>
Angelo Sorce Productions 112417 10-66-9940	Cable Broadcast	INV 0884	400.00	38863	12/17/24	<u>400.00</u>
Baker & Taylor 120290				38864	12/17/24	<u>1,789.57</u>
10-52-3100	Children Books	INV 2038454023	153.68			
10-52-3100	Children Books	INV 2038687963	341.87			
10-52-3100	Children Books	INV 2038690112	394.61			
10-52-3100	Children Books	INV 2038676970	237.63			
10-54-3110	Adult Books	INV 2038709014	593.95			
10-66-9250	Materials Management Supplies	INV 2038454024	2.38			
10-66-9250	Materials Management Supplies	INV 2038687964	22.61			
10-66-9250	Materials Management Supplies	INV 2038676971	5.95			
10-66-9250	Materials Management Supplies	INV 2038690113	10.71			
10-66-9250	Materials Management Supplies	INV 2038718365	10.71			
10-66-9250	Materials Management Supplies	INV 2038709015	15.47			
Baker & Taylor 120300				38865	12/17/24	<u>389.94</u>
10-54-3900	Adult Other Expenditures	INV 2038662309	296.12			
10-66-9250	Materials Management Supplies	INV 2038662310	93.82			
Baker & Taylor 120310				38866	12/17/24	<u>9,561.71</u>
10-54-3110	Adult Books	INV 2038687872	1,906.76			
10-54-3110	Adult Books	INV 2038685316	1,864.29			
10-54-3110	Adult Books	INV 2038666326	574.13			
10-54-3110	Adult Books	INV 2038660900	429.91			
10-54-3110	Adult Books	INV 2038709018	1,174.02			
10-54-3110	Adult Books	INV 2038715098	989.78			
10-54-3110	Adult Books	INV 2038702039	1,089.24			
10-54-3110	Adult Books	INV 2038696129	1,240.85			
10-66-9250	Materials Management Supplies	INV 2038702840	40.46			
10-66-9250	Materials Management Supplies	INV 2038715099	36.89			

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Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-66-9250	Materials Management Supplies	INV 2038660901	7.14			
10-66-9250	Materials Management Supplies	INV 2038685317	51.17			
10-66-9250	Materials Management Supplies	INV 2038687873	80.92			
10-66-9250	Materials Management Supplies	INV 2038696130	34.51			
10-66-9250	Materials Management Supplies	INV 2038666327	10.70			
10-66-9250	Materials Management Supplies	INV 2038722481	8.33			
10-66-9250	Materials Management Supplies	INV 2038709019	22.61			
Baker & Taylor 120330				38867	12/17/24	<u>39.09</u>
10-54-3110	Adult Books	INV 2038720455	39.09			
Brigit Goudie 892136				38868	12/17/24	<u>150.00</u>
10-64-8120	Children Services Programs - General	Create w/ Oil Pastels	150.00			
Brooke Sievers 829192				38869	12/17/24	<u>148.23</u>
10-62-7550	In-State Travel	Rockford PL (148 mi x .67)	99.16			
10-62-7550	In-State Travel	Tolls	4.80			
10-62-7550	In-State Travel	Aurora PL - (61 mi x .67)	40.87			
10-62-7550	In-State Travel	Tolls	3.40			
CDS Office Technologies 131476				38870	12/17/24	<u>103.99</u>
10-66-9270	Information Technology Supplies	INV 1658150	103.99			
CDW Government 131480				38871	12/17/24	<u>785.32</u>
10-66-9270	Information Technology Supplies	INV AB2UG5U	72.96			
10-66-9270	Information Technology Supplies	INV AB2KB6W	267.92			
10-66-9270	Information Technology Supplies	INV AB6Q56I	144.90			
10-66-9270	Information Technology Supplies	INV AB6DY7P	14.40			
10-66-9270	Information Technology Supplies	INV AB6SN5C	285.14			
Center Point Publishing 131571				38872	12/17/24	<u>480.00</u>
10-64-8165	Community Engagement Program	INV 2137973	480.00			
Complete Cleaning 132523				38873	12/17/24	<u>5,400.00</u>
10-58-5320	Cleaning Service	INV C28807	5,400.00			
Courtney Moore 823200				38874	12/17/24	<u>214.40</u>
10-62-7550	In-State Travel	ILA Conference - 320 mi x .67	214.40			
Crimson Multimedia Dist. 132835				38875	12/17/24	<u>749.46</u>
10-52-3900	Children Other Expenditures	INV 017843	447.42			
10-54-3900	Adult Other Expenditures	INV 017845	252.04			

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Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-54-3900	Adult Other Expenditures	INV 017844	50.00			
Donna Quick 273141 10-62-7550	In-State Travel	Sam's Club pick up - 14.4 mi x .67	9.65	38876	12/17/24	<u>9.65</u>
Drip Investor 142846 10-55-3400	Magazines/News	Customer #4207965	74.00	38877	12/17/24	<u>74.00</u>
Ebsco Information Services 151271 10-55-3400	Magazines/News	INV 1754621	41.95	38878	12/17/24	<u>41.95</u>
Ehler Investment Partners, LLC 151700 10-56-4900	Other Contracts	Oct 2024	2,938.37	38879	12/17/24	<u>2,938.37</u>
Elizabeth Lynch 892107 10-62-7550	In-State Travel	ILA Conference - 285 mi x .67	190.95	38880	12/17/24	<u>190.95</u>
Empathy Studios, LLC 10-66-9850	Per Capita Grant - Prior Year	INV 60385390000012690350	999.00	38881	12/17/24	<u>999.00</u>
Encyclopaedia Britannica, Inc 152251 10-55-3500	Online Databases	INV Q-873111-2	2,970.00	38882	12/17/24	<u>2,970.00</u>
Gabriela Tafolla 162821 10-62-7550	In-State Travel	Outreach - 17.2 mi x .67	11.52	38883	12/17/24	<u>11.52</u>
GALE/CENGAGE Learning 171152 10-54-3110 10-55-3500	Adult Books Online Databases	INV 85993508 INV 85971438	301.38 4,370.00	38884	12/17/24	<u>4,671.38</u>
IHLS - OCLC 191857 10-61-6200	Software/Licenses	INV 31590	299.17	38885	12/17/24	<u>299.17</u>
IL Library Association 192210 10-62-7510 10-62-7510 10-62-7510	Memberships (Staff & Board) Memberships (Staff & Board) Memberships (Staff & Board)	INV 299582 INV 299594 INV 299558	150.00 150.00 250.00	38886	12/17/24	<u>550.00</u>
Indian Trail Junior High School 192430 10-66-9245	Teen Services Supplies	2024-25 Yearbook	30.00	38887	12/17/24	<u>30.00</u>
Innovation Arts Connection, LLC				38888	12/17/24	<u>200.00</u>

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Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-64-8120	Children Services Programs - General	Winter Wonderland Dance Party - 1/10/25	200.00			
Jackson-Hirsh, Inc. 201115 10-66-9960	Friends of the Library	INV 1092673	136.85	38889	12/17/24	<u>136.85</u>
Jodi Gianakopoulos 892160 10-62-7550 10-62-7550	In-State Travel In-State Travel	Rails Networking Group - 1.6 x .67 Parking	1.07 7.50	38890	12/17/24	<u>8.57</u>
Laurie Larson 892174 10-62-7550	In-State Travel	HR Source updates - 31.2 mi x .67	20.90	38891	12/17/24	<u>20.90</u>
Lauterbach&Amen LLP 172582 10-56-4450 10-56-4450	Accounting Service Fees Accounting Service Fees	INV 98092 INV 98817	280.00 1,800.00	38892	12/17/24	<u>2,080.00</u>
Len's Ace Hardware, Inc. 221567 10-58-5610 10-58-5610 10-58-5610 10-66-9230	Building Supplies Building Supplies Building Supplies Adult Services Supplies	INV 526934/1 INV 527829/1 INV 527993/1 INV K27828/1	104.33 120.21 41.35 13.47	38893	12/17/24	<u>279.36</u>
Lesley Cyrier 892152 10-62-7550	In-State Travel	Inter Fair - 20.6 mi x .67	13.80	38894	12/17/24	<u>13.80</u>
LinkedIn Corporation 10-55-3500	Online Databases	Order # FLD10014923413	7,000.00	38895	12/17/24	<u>7,000.00</u>
Loyola University Chicago 222576 10-66-9930	Reciprocal Borrowing Expense	INV 194145	100.00	38896	12/17/24	<u>100.00</u>
Matthew Williams 892182 10-62-7550 10-64-8165 10-62-7500	In-State Travel Community Engagement Program Community Engagement	Mileage - 50.3 x .67 Marcus Theatre Meals	33.70 25.00 29.05	38897	12/17/24	<u>87.75</u>
Midwest Tape 231925 10-52-3900 10-52-3900 10-54-3900 10-54-3900	Children Other Expenditures Children Other Expenditures Adult Other Expenditures Adult Other Expenditures	INV 506365486 INV 506396150 INV 506325980 INV 506333665	134.18 11.99 251.95 81.09	38898	12/17/24	<u>5,114.23</u>

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Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-54-3900	Adult Other Expenditures	INV 506333904	96.72			
10-54-3900	Adult Other Expenditures	INV 506333668	209.17			
10-54-3900	Adult Other Expenditures	INV 506333905	52.48			
10-54-3900	Adult Other Expenditures	INV 506333663	123.70			
10-54-3900	Adult Other Expenditures	INV 506333664	242.11			
10-54-3900	Adult Other Expenditures	INV 506333667	169.41			
10-54-3900	Adult Other Expenditures	INV 506333903	31.49			
10-54-3900	Adult Other Expenditures	INV 506333902	11.24			
10-54-3900	Adult Other Expenditures	INV 506333901	77.20			
10-54-3900	Adult Other Expenditures	INV 506333900	24.74			
10-54-3900	Adult Other Expenditures	INV 506333669	46.48			
10-54-3900	Adult Other Expenditures	INV 506299642	194.88			
10-54-3900	Adult Other Expenditures	INV 506299649	14.99			
10-54-3900	Adult Other Expenditures	INV 506299644	60.28			
10-54-3900	Adult Other Expenditures	INV 506299643	41.97			
10-54-3900	Adult Other Expenditures	INV 506299641	31.49			
10-54-3900	Adult Other Expenditures	INV 506333906	151.59			
10-54-3900	Adult Other Expenditures	INV 506376189	151.97			
10-54-3900	Adult Other Expenditures	INV 506275255	513.89			
10-54-3900	Adult Other Expenditures	INV 506299640	98.94			
10-54-3900	Adult Other Expenditures	INV 506299646	29.99			
10-54-3900	Adult Other Expenditures	INV 506299647	92.20			
10-54-3900	Adult Other Expenditures	INV 506299648	48.72			
10-54-3900	Adult Other Expenditures	INV 506365484	56.23			
10-54-3900	Adult Other Expenditures	INV 506365482	40.47			
10-54-3900	Adult Other Expenditures	INV 506365481	59.97			
10-54-3900	Adult Other Expenditures	INV 506365485	33.73			
10-54-3900	Adult Other Expenditures	INV 506365487	10.49			
10-54-3900	Adult Other Expenditures	INV 506376188	73.99			
10-54-3900	Adult Other Expenditures	INV 506353742	220.95			
10-54-3900	Adult Other Expenditures	INV 506396139	617.86			
10-54-3900	Adult Other Expenditures	INV 506365480	93.69			
10-66-9250	Materials Management Supplies	INV 2000007098	252.42			
10-55-3860	E-Books	INV 506354699	89.99			
10-55-3860	E-Books	INV 506308328	569.58			
Morningstar Inc 232576				38899	12/17/24	<u>12,481.00</u>
10-55-3500	Online Databases	Subscriber ID 8140791	12,481.00			
Nardi's Pizza 241172				38900	12/17/24	<u>580.00</u>
10-66-9970	FUNshine Committee	INV 251851 - 11/6/24	183.00			
10-64-8160	Teen Program	INV 408439 - 10/16/24	82.00			

## Addison Public Library Check Register

All Bank Accounts  
November 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
10-64-8160	Teen Program	INV 251854 - 11/14/24	29.75			
10-64-8160	Teen Program	INV 160966 - 11/21/24	34.88			
10-64-8160	Teen Program	INV 251853 - 11/7/24	59.00			
10-64-8100	Adult Services Programs	INV 161016 - 11/20/24	67.75			
10-64-8100	Adult Services Programs	INV 251854 - 11/14/24	29.75			
10-64-8100	Adult Services Programs	INV 160966 - 11/21/24	34.87			
10-64-8100	Adult Services Programs	INV 251853 - 11/7/24	59.00			
Natalie Hernandez 10-62-7550	In-State Travel	Outreach - 3.2 mi x .67	2.14	38901	12/17/24	<u>2.14</u>
ODP Business Solutions 251353 10-66-9220	Guest Services Supplies	INV 395051204001	15.38	38902	12/17/24	<u>15.38</u>
Patricia Trampas 261181 10-64-8100	Adult Services Programs	Essentrics - 12/18/24 @ 1pm	80.00	38903	12/17/24	<u>80.00</u>
Patti Gebala 892144 10-62-7550	In-State Travel	Outreach - 20.1 mi x .67	13.47	38904	12/17/24	<u>13.47</u>
Playaway 262219 10-52-3900 10-52-3900	Children Other Expenditures Children Other Expenditures	INV 482132 INV 480926	550.46 53.00	38905	12/17/24	<u>603.46</u>
Product Architecture + Design 262850 80-55-1905	Renovation Project	INV 1650.0840	76,956.36	38906	12/17/24	<u>76,956.36</u>
Quill 273145 10-66-9210 10-66-9300 10-66-9230	Office Supplies Library Wide Supplies Adult Services Supplies	INV 41620109 INV 41620109 INV 41620109	13.18 465.77 32.72	38907	12/17/24	<u>511.67</u>
Ra'am Integration Solutions 10-58-5620 10-58-5620	HVAC HVAC	INV 1561 INV 1560	1,700.00 830.00	38908	12/17/24	<u>2,530.00</u>
Rachel Kaiser 892154 10-62-7550 10-62-7550	In-State Travel In-State Travel	Glen Ellyn FP - 18 mi x .67 Mileage - 29.2 mi x .67	12.06 19.56	38909	12/17/24	<u>31.62</u>
Rachel Wickersham 331915 10-64-8910	Other Promotions	INV 135131-11	144.12	38910	12/17/24	<u>144.12</u>

## Addison Public Library

### Check Register

All Bank Accounts

November 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Robbins Schwartz 282514				38911	12/17/24	<u>395.78</u>
10-56-4100	Legal Fees	September 2024	115.26			
10-56-4100	Legal Fees	October 2024	280.52			
Samantha Parkison 892193				38912	12/17/24	<u>115.86</u>
10-62-7560	Out-of-State Travel	Meals	115.86			
Sharon Gladys Bowers				38913	12/17/24	<u>225.00</u>
10-64-8100	Adult Services Programs	Navigating Grief - 1/9/25 @ 6:30pm	225.00			
Sherie C Shapiro 291967				38914	12/17/24	<u>75.00</u>
10-64-8100	Adult Services Programs	Ageless Grace - 12/19/24	75.00			
Unique Patron Services Solutions 312431				38915	12/17/24	<u>436.10</u>
10-61-6200	Software/Licenses	INV 6131939	40.00			
10-56-4410	Collection Agency Fees	INV 6132334	396.10			
Village of Addison - HSA				38916	12/17/24	<u>2,691.41</u>
10-50-2400	Health Insurance	HSA Contributions EE+ER - 12/18/24 Payroll	2,691.41			
Yesenia Benavidez 892185				38917	12/17/24	<u>44.68</u>
10-62-7550	In-State Travel	Food Pantry - 2.4 mi x .67	1.61			
10-62-7550	In-State Travel	Food Pantry - 2.4 mi x .67	1.61			
10-62-7550	In-State Travel	Mileage - 7.8 mi x .67	5.22			
10-62-7550	In-State Travel	Parking	14.00			
10-62-7550	In-State Travel	Member meeting - 33.2 mi x .67	22.24			
<b>Check List Total</b>						<u><u>267,997.88</u></u>

Plus November payroll for 2024: \$255,871.83

Grand Total: \$523,869.71

# Addison Public Library

## Check List

All Bank Accounts

November 1, 2024 - December 17, 2024

Check Number	Check Date	Payee	Amount
<b>Vendor Checks</b>			
1297	11/30/24	Addison Public Library 500004	477.00
21549	11/12/24	ADP, LLC #110146	4,589.66
21550	11/12/24	Albertsons - Safeway 112213	482.93
21551	11/12/24	Comcast 132554	398.07
21552	11/12/24	Nicor Gas 241916	1,127.15
21553	11/12/24	Republic Services #551 122869	399.73
21554	11/14/24	Educate Station LLC 151487	400.00
21555	11/14/24	Three Bees Honey Farms, LLC 301509	297.00
21556	11/20/24	Andrea Naranjo	325.00
21557	11/20/24	Andrea Naranjo	325.00
21558	11/20/24	Mission Square 231901	2,657.55
21559	11/20/24	Quill 273145	74.97
21560	11/20/24	Verizon	102.12
21561	11/20/24	Village of Addison - HSA	2,691.59
21562	11/25/24	Village of Addison: Misc Exp 500010	103.60
21563	11/25/24	Village of Addison: Misc Exp 500010	110.00
21564	11/25/24	Village of Addison: Misc Exp 500010	637.87
21565	11/25/24	Village of Addison: Misc Exp 500010	777.82
21566	11/25/24	Village of Addison:Health Ins 500011	30,287.55
21567	11/25/24	Village of Addison:Health Ins 500011	2,180.85
21568	11/25/24	Village of Addison:Health Ins 500011	303.36
38826	12/05/24	4imprint, Inc. 162600	2,389.21
38827	12/05/24	Amazon Capital Services 112300	429.00
38828	12/05/24	Amazon Capital Services 112300	1,046.35
38829	12/05/24	Amazon Capital Services 112300	1,357.70
38830	12/05/24	Amazon Capital Services 112300	283.18
38831	12/05/24	BMO Harris Bank N.A. 22301	8,670.02
38832	12/05/24	Brigit Goudie 892136	200.00
38833	12/05/24	Business Office Systems 123175	27,429.06
38834	12/05/24	CDS Office Technologies 131476	1,305.32
38835	12/05/24	CDW Government 131480	1,537.96
38836	12/05/24	Center Point Publishing 131571	23.97
38837	12/05/24	CMRS-FP 132402	1,000.00
38838	12/05/24	Comcast 132548	68.96
38839	12/05/24	Crimson Multimedia Dist. 132835	1,955.19
38840	12/05/24	D&Z House of Books Inc 143662	422.96
38841	12/05/24	Demco Inc 141551	1,410.81
38842	12/05/24	Elenco Electronics, Inc. 152240	58.80
38843	12/05/24	GALE/CENGAGE Learning 171152	589.29
38844	12/05/24	Grainger 333337	155.16
38845	12/05/24	Imperial Dade 192340	491.80
38846	12/05/24	Krystyna Jaroc 201175	400.00
38847	12/05/24	Lakeshore Learning Material 221153	57.48
38848	12/05/24	Libraria 131861	2,514.23
38849	12/05/24	Marti LaHood - 281914	80.00
38850	12/05/24	Mission Square 231901	2,657.55
38851	12/05/24	Muggs n Manor 233100	25.00
38852	12/05/24	NobleTec LLC	6,500.00
38853	12/05/24	OTC Brands, Inc 252842	118.29
38854	12/05/24	Quill 273145	295.57
38855	12/05/24	Scholastic Library Publishing 172866	2,314.00
38856	12/05/24	Team One Repair, Inc. 301514	390.00
38857	12/05/24	United States Postal Service 312448	1,000.00
38858	12/05/24	Village of Addison - HSA	2,691.43
38859	12/05/24	Village of Addison: Misc Exp 500010	40.00
38860	12/05/24	Welcome Wagon 331191	144.12
38861	12/17/24	Amazon Capital Services 112300	3,014.44

# Addison Public Library

## Check List

All Bank Accounts

November 1, 2024 - December 17, 2024

Check Number	Check Date	Payee	Amount
38862	12/17/24	American Library Association	210.00
38863	12/17/24	Angelo Sorce Productions 112417	400.00
38864	12/17/24	Baker & Taylor 120290	1,789.57
38865	12/17/24	Baker & Taylor 120300	389.94
38866	12/17/24	Baker & Taylor 120310	9,561.71
38867	12/17/24	Baker & Taylor 120330	39.09
38868	12/17/24	Brigit Goudie 892136	150.00
38869	12/17/24	Brooke Sievers 829192	148.23
38870	12/17/24	CDS Office Technologies 131476	103.99
38871	12/17/24	CDW Government 131480	785.32
38872	12/17/24	Center Point Publishing 131571	480.00
38873	12/17/24	Complete Cleaning 132523	5,400.00
38874	12/17/24	Courtney Moore 823200	214.40
38875	12/17/24	Crimson Multimedia Dist. 132835	749.46
38876	12/17/24	Donna Quick 273141	9.65
38877	12/17/24	Drip Investor 142846	74.00
38878	12/17/24	Ebsco Information Services 151271	41.95
38879	12/17/24	Ehler Investment Partners, LLC 151700	2,938.37
38880	12/17/24	Elizabeth Lynch 892107	190.95
38881	12/17/24	Empathy Studios, LLC	999.00
38882	12/17/24	Encyclopaedia Britannica, Inc 152251	2,970.00
38883	12/17/24	Gabriela Tafolla 162821	11.52
38884	12/17/24	GALE/CENGAGE Learning 171152	4,671.38
38885	12/17/24	IHLS - OCLC 191857	299.17
38886	12/17/24	IL Library Association 192210	550.00
38887	12/17/24	Indian Trail Junior High School 192430	30.00
38888	12/17/24	Innovation Arts Connection, LLC	200.00
38889	12/17/24	Jackson-Hirsh, Inc. 201115	136.85
38890	12/17/24	Jodi Gianakopoulos 892160	8.57
38891	12/17/24	Laurie Larson 892174	20.90
38892	12/17/24	Lauterbach&Amen LLP 172582	2,080.00
38893	12/17/24	Len's Ace Hardware, Inc. 221567	279.36
38894	12/17/24	Lesley Cyrier 892152	13.80
38895	12/17/24	LinkedIn Corporation	7,000.00
38896	12/17/24	Loyola University Chicago 222576	100.00
38897	12/17/24	Matthew Williams 892182	87.75
38898	12/17/24	Midwest Tape 231925	5,114.23
38899	12/17/24	Morningstar Inc 232576	12,481.00
38900	12/17/24	Nardi's Pizza 241172	580.00
38901	12/17/24	Natalie Hernandez	2.14
38902	12/17/24	ODP Business Solutions 251353	15.38
38903	12/17/24	Patricia Trampas 261181	80.00
38904	12/17/24	Patti Gebala 892144	13.47
38905	12/17/24	Playaway 262219	603.46
38906	12/17/24	Product Architecture + Design 262850	76,956.36
38907	12/17/24	Quill 273145	511.67
38908	12/17/24	Ra'am Integration Solutions	2,530.00
38909	12/17/24	Rachel Kaiser 892154	31.62
38910	12/17/24	Rachel Wickersham 331915	144.12
38911	12/17/24	Robbins Schwartz 282514	395.78
38912	12/17/24	Samantha Parkison 892193	115.86
38913	12/17/24	Sharon Gladys Bowers	225.00
38914	12/17/24	Sherie C Shapiro 291967	75.00
38915	12/17/24	Unique Patron Services Solutions 312431	436.10
38916	12/17/24	Village of Addison - HSA	2,691.41
38917	12/17/24	Yesenia Benavidez 892185	44.68
<b>Vendor Check Total</b>			<u>267,997.88</u>
Check count = 113			<b>Check List Total</b> <u>267,997.88</u>

**Addison Public Library**  
**Payroll Distribution Summary**

**Board Meeting**            **12/17/2024**

<u>Description</u>	<u>Amount</u>
Payroll	\$255,871.83

**Approved by Board of Trustees**

\_\_\_\_\_  
**President**

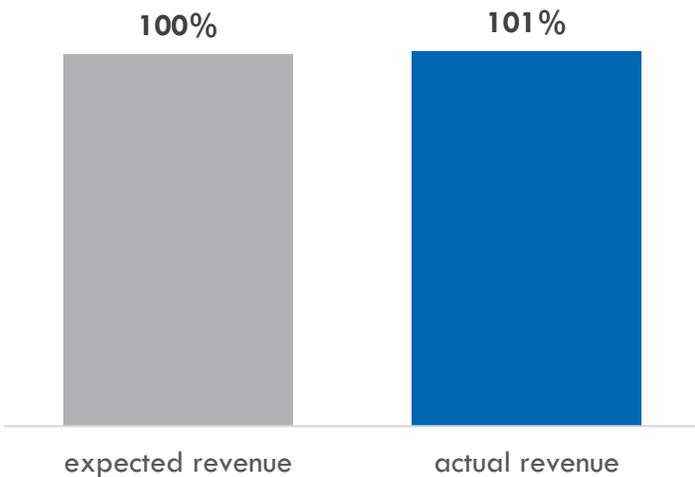
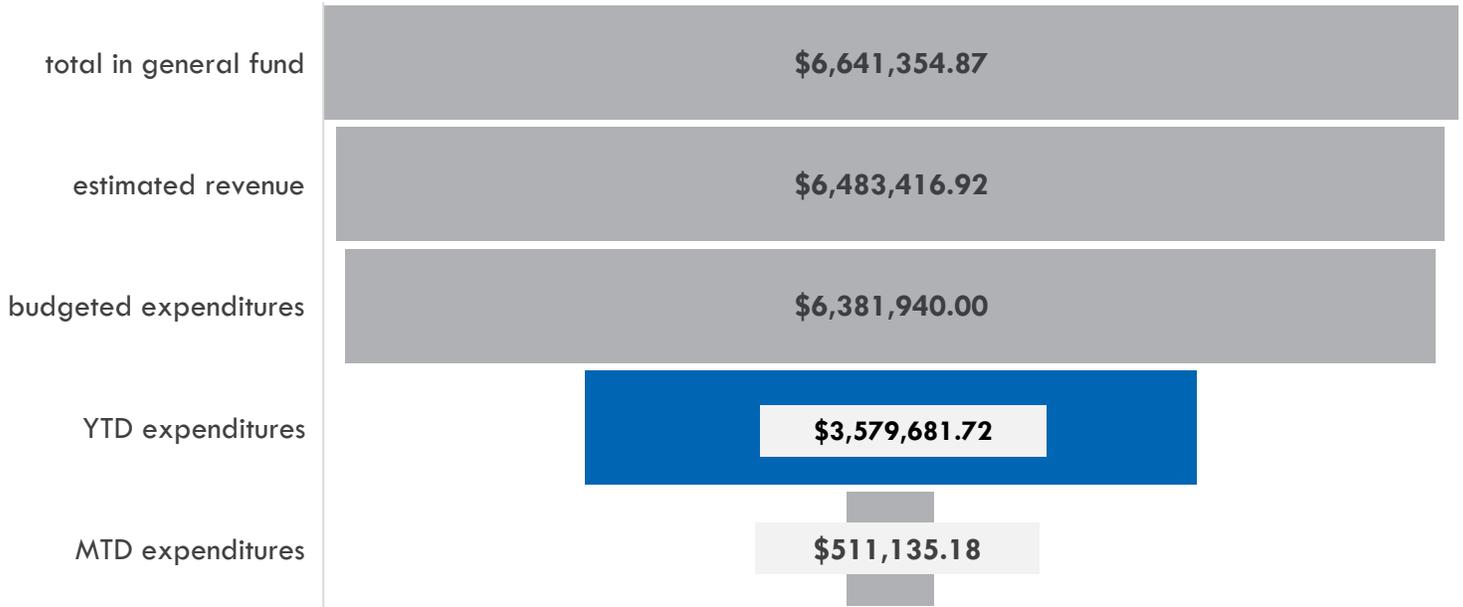
\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Secretary**

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

# November 2024 Financial Highlights

# General Fund



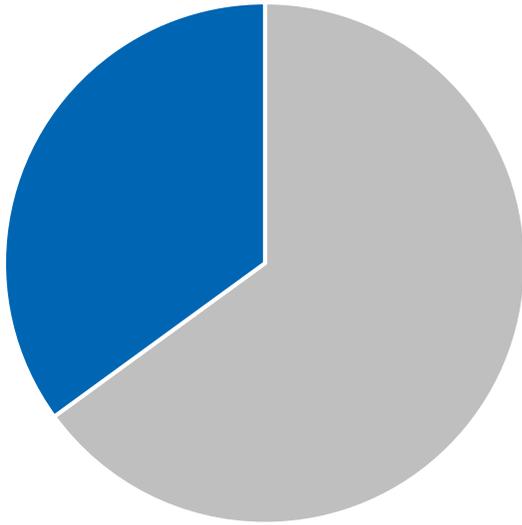
We have received 101% of our estimated revenue for the fiscal year including \$126,440.28 this month.

At this point last year, we had received 104% of our estimated revenue for FY24.

\$6.92 million      \$6.64 million

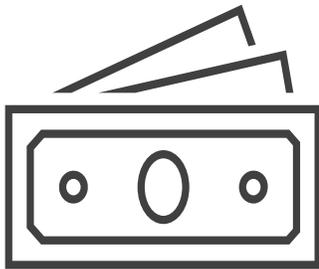
The general fund decreased from \$6.92 million to \$6.64 million from 11/1/2024 to 11/30/2024.

This is a result of \$126k revenue coming in and \$511k (general fund + asset replacement) expended.



54% has been spent out of the general fund. We are 58% through the fiscal year.

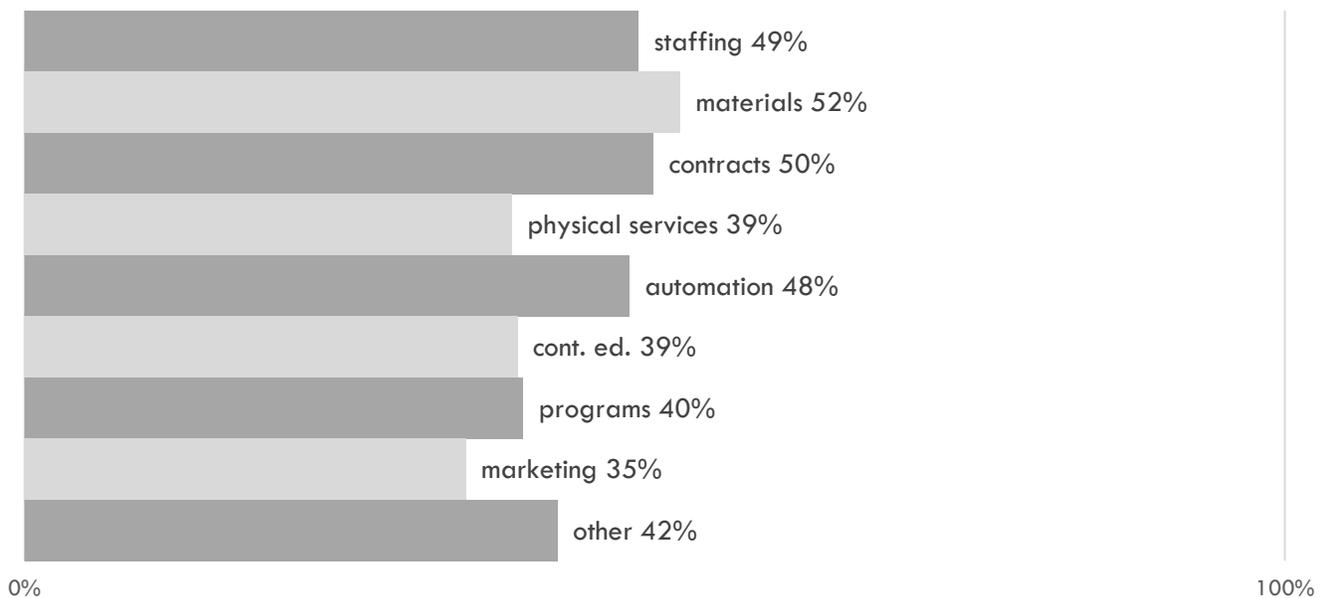
We have budgeted to spend 96% of what is currently in the general fund.

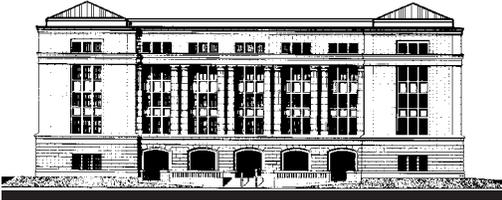


We have spent 56% of our estimated budget.

At this point last year, we had spent 51% of our estimated budget for FY24, so we're ahead of the previous year's spending.

**Year-to-date spending by budget group**





**ALEXI GIANNOULIAS • Secretary of State & State Librarian**  
Illinois State Library, Gwendolyn Brooks Building  
300 S. Second St., Springfield, IL 62701-1796

**ilsos.gov**

## Illinois Public Library Per Capita Grant Expenditures Report

**Control Number:** \_\_\_\_\_ **City:** \_\_\_\_\_

**Library Name:** \_\_\_\_\_

**Exact amount of Per Capita Grant received in Fiscal Year 2023:** \_\_\_\_\_

Based on the library's Planned Use of Grant Funds from the FY2023 grant application, report use of Per Capita Grant funds awarded to meet or improve performance levels in relation to the standards in Serving Our Public 4.0: Standards for Illinois Public Libraries (23 ILAC 3035.115). Do not include monetary figures or specific brands.

Only check the standard(s) under which FY2023 Per Capita Grant funds were disbursed. Briefly report how grant funds were used and explain how grant funds helped meet or make progress toward meeting the applicable standard.

Core Standards — Chapter 1

Governance and Administration — Chapter 2

Personnel — Chapter 3

Access — Chapter 4

Building Infrastructure and Maintenance — Chapter 5

Safety — Chapter 6

Collection Management — Chapter 7

System Member Responsibilities and Resource Sharing — Chapter 8

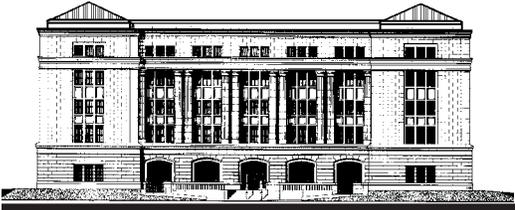
Public Services: Reference and Reader's Advisory — Chapter 9

Programming — Chapter 10

Youth/Young Adult Services — Chapter 11

Technology — Chapter 12

Marketing, Promotion, and Collaboration — Chapter 13



**ALEXI GIANNOULIAS • Secretary of State & State Librarian**  
Illinois State Library, Gwendolyn Brooks Building  
300 S. Second St., Springfield, IL 62701-1796

**ilsos.gov**

**Illinois State Library**

**ILLINOIS PUBLIC LIBRARY PER CAPITA AND  
EQUALIZATION AID GRANT APPLICATION**

As required by The Illinois Library System Act (23 Ill. Adm. Code 3030.200 (a)(2)(I) and (J)), to be eligible for funding, the applying public library shall have completed the Illinois Public Library Annual Report (IPLAR) and the annual certification process to confirm eligibility for grants administered by the Illinois State Library.

The Library Board of Trustees agrees to expend the funds received for the purposes outlined in the application as approved by the Illinois State Library, and as stipulated by the Illinois Library Systems Act (75 ILCS 10/8 and 10/8.1) and Illinois State Library Grant Programs (23 Ill. Adm. Code 3035.115 and 3035.135).

The Library Board of Trustees affirms that all grant funds received as a result of this application shall be used to provide public library service to its community by supplementing the library’s regular budget and that it will not reduce, nor cause to have reduced, the public library’s levy in the current or next fiscal year.

The Library Board of Trustees agrees that the Illinois State Library or its designee shall have the right to examine any of the records directly related to this grant.

**Legal Name of Library:** \_\_\_\_\_

**Library’s Control Number:** \_\_\_\_\_ **Branch Number:** \_\_\_\_\_ **Today’s Date:** \_\_\_\_\_

**Contact information of the person completing this grant application:**

**Preparer’s Name:** \_\_\_\_\_  
*(First Name)* *(Last Name)*

**Preparer’s Title:** \_\_\_\_\_

**Preparer’s Phone Number:** \_\_\_\_\_

**Preparer’s Email Address:** \_\_\_\_\_

**By checking this box, I certify: 1) that I have the authority to submit this application on behalf of the Library Board of Trustees, and 2) that the statements herein are true, complete and accurate to the best of my knowledge. The Library Board of Trustees is aware that any false, fictitious or fraudulent statements or claims may be subject to civil, criminal or administrative penalties.**

**Changes in the population count** for the eligible service area must be documented and supporting information that details the increase or decrease shall be submitted electronically with this application. Documentation must include one of the following:

- A U.S. Census certification (e.g., correction or special census) that has been filed with the Office of the Secretary of State Index Department prior to submission of the application.
- For population changes, annexations or disconnects that are typically not documented by the U.S. Census, the library must submit appropriate and substantial supporting information, including a certified population count. Examples include, but are not limited to: legal documentation from an appropriate municipal corporate authority or a library district's referenda questions and certified results.

If the population has not changed, no additional documentation is necessary.

**Service Area Population** \_\_\_\_\_

**Part I. Review of *Serving Our Public 4.0: Standards for Illinois Public Libraries* (© Illinois Library Association, 2019)**

To be eligible for a per capita grant, a public library shall show that it will either meet or show progress toward meeting the Illinois library standards as most recently adopted by the Illinois Library Association (75 ILCS 10/8.1).

A grant applicant with below standard performance levels must raise or improve its performance levels in relation to the standards according to the objectives, time frames and priorities the library shall state in the application and which are consistent with the terms of the plan of service of the system of which it is a member. (23 ILAC 3035.115)

The Library Director and the Board of Trustees shall review the entirety of *Serving Our Public 4.0: Standards for Illinois Public Libraries*. To complete this application, refer to the checklist at the conclusion of each chapter.

**Chapter 1: Core Standards**

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all Core Standards, please indicate. (150 word limit)

## Chapter 2: Governance and Administration

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Governance and Administration checklist, please indicate. (150 word limit)

## Chapter 3: Personnel

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Personnel checklist, please indicate. (150 word limit)

## Chapter 4: Access

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Access checklist, please indicate. (150 word limit)

## Chapter 5: Building Infrastructure and Maintenance

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Building Infrastructure and Maintenance checklists, please indicate. (150 word limit)

## Chapter 6: Safety

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Safety checklist, please indicate. (150 word limit)

## Chapter 7: Collection Management

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Collection Management checklist, please indicate. (150 word limit)

## **Chapter 8: System Member Responsibilities and Resource Sharing**

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the System Membership Responsibilities and Resource Sharing checklist, please indicate. (150 word limit)

## **Chapter 9: Public Services: Reference and Reader's Advisory Services**

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Reference Service checklist and the Reader's Advisory Service checklist, please indicate. (150 word limit)

## Chapter 10: Programming

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Programming checklist, please indicate. (150 word limit)

## Chapter 11: Youth/Young Adult Services

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Youth/Young Adult Services checklist, please indicate. (150 word limit)

## Chapter 12: Technology

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Technology checklist, please indicate. (150 word limit)

## Chapter 13: Marketing, Promotion and Collaboration

**Explain** the objectives and priorities to be undertaken during the ensuing year to improve the library's performance levels where the chapter's standards are not met or the library is making progress toward meeting those standards. If the library meets all components of the Marketing, Promotion and Collaboration checklist, please indicate. (150 word limit)

## Part II: Planned Use of Grant Funds

**Describe** objectives and priorities for use of grant monies to meet or improve performance levels in relation to the standards in *Serving Our Public 4.0: Standards for Illinois Public Libraries* (23 ILAC 3035.115). Use general categories in identifying actual planned expenditures. Do NOT include monetary figures or specific brands.



CONSTRUCTION MANAGEMENT  
December 12, 2024

Mary Medjo Me Zengue  
Director  
Addison Public Library  
4 Friendship Plaza  
Addison, IL 60101

RE: Addison Public Library  
Interior Renovations  
Recommendation for BP#1  
FQC #562

Dear Ms. Me Zengue:

On December 3rd, 2024, bids were received for seventeen (17) trade packages, and on December 10, 2024, bids were received for one(1) bid package with a total of Sixty-Six (68) individual bids received. The bid openings followed legal advertisement for bids on November 4th, 2024, a pre-bid meeting on November 5th, 2024, and issuance of electronic invitations to bid from Frederick Quinn Corporation to over 300 trade contractors. The purpose of this letter is to provide a summary of the bids received and to recommend the award of trade contracts to low responsive, responsible contractors for their respective bid packages.

The attached bid tabulations detail the bids as read at the bid opening. Subsequent to the receipt of bids, scope review meetings were held with the apparent low bidders by FQC for each bid package. Following the review with the bidders FQC is recommending awards of trade contracts to the low responsive and responsible bidder in the bid packages noted below. The summary details any irregularities in the bidding process, if any.

In the best interest of APL, FQC is recommending the acceptance of alternates bids to move the installation of casework / millwork from BP#1-06b Casework Millwork to BP#1-06a General Trades & Carpentry. This change results in savings to APL of \$78,450.00. This change is accomplished by accepting BP#1-06a alternate #1-06a-1 and BP#1-06b alternate #-06b-1. The acceptance of BP#1-06b, alternate 1-06b-1 does result in a change to the low trade contractor for BP#1-06b. The summary and specific award recommendations detail the above and any other alternatives that were considered during the bid review and award recommendation process. The award recommendations are as follows:

- Bid Package #1-02 – Demolition:** Five (5) bids were received. Midwest Wrecking Company of Geneva, IL., was the low as read bidder and is recommended as the low responsive and responsible bidder. There are no irregularities with the bid as presented. **We recommend that BP #1-02 be awarded to Midwest Wrecking for the base bid with the acceptance of Alternate #1 to remove existing strip fixtures for the total amount of Three Hundred Forty-Five Eight Thousand Five Hundred Ninety-One Dollars \$345,591.00.**
- Bid Package #1-03 – Concrete, Earthwork & Paving:** Four (4) bids received. Elliot Construction Corporation of Glen Ellyn, IL., was the low as read bidder and is recommended as the low responsive and responsible bidder. There are no irregularities with the bid as presented. **We recommend that BP#1-03 be awarded to Elliot Construction Corporation for the base bid amount of One Hundred Five Thousand Dollars \$105,000.00.**
- Bid Package #1-04 Masonry:** Five (5) Bids were received. Cyberdyne Masonry Corporation of North Aurora, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-04 be awarded to Cyberdyne Masonry Corp. for the base bid amount of Thirty-Eight Thousand Dollars \$38,00.00.**
- Bid Package #1-05 Structural & Misc. Steel:** Two (2) bids received. Mechanical & Industrial Steel Services, Inc. of Channahon, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-05 be awarded to Mechanical & Industrial Steel Services Inc. for the base bid amount of Three Hundred Fifty-Three Thousand Six Hundred Dollars \$353,600.00).**

5. **Bid Package #1-06a General Trades & Carpentry:** Three (3) bids received. Hargrave Builders of South Elgin, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-06a be awarded to Hargrave Builders for the base bid with the acceptance of Alternate BP#1-06a-1 to provide labor to install millwork for a total awarded amount of Nine Hundred Twenty-Three Thousand Four Hundred Fifty Dollars \$923,450.00.**
6. **Bid Package #1-06b Casework & Millwork:** Two (2) bids received. The low as read base bid was provided by Hargrave Builders of South Elgin, IL in the amount of \$1,612,450.00. The second bidder was CS Architectural Millworking of Montgomery, IL. in the amount of \$1,625,000.00. A scope review was performed with both subcontractors, with both having complete, responsive and responsible bids. With the acceptance of alternate #1-06b-1 the low response bid is provided by CS Architectural Millworking. **We recommend that BP #1-06b be awarded to CS Architectural Millworking for the base bid with the acceptance of Alternate BP#1-06b-1 to eliminate labor on the millwork for a total awarded amount of One Million Three Hundred Ninety-Five Thousand Dollars \$1,395,000.00.**
7. **Bid Package #1-07 Roofing & Sheetmetal:** Seven (7) Bids were received. Weatherguard Roofing Co. of Elgin, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-07 be awarded to Weatherguard Roofing Co for the base bid amount of Sixty-Five Thousand Dollars \$65,000.00.**
8. **Bid Package #1-08a Doors, Frames & Hardware:** Three (3) Bids were received. Anderson Lock Company of Des Plaines, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-08a be awarded to Anderson Lock Co for the base bid amount of Sixty-Six Thousand Eight Hundred Ninety-Five Dollars \$66,895.00.**
9. **Bid Package #1-08b Aluminum, Glass & Glazing:** One (1) Bid was received. Prime Architectural Metal and Glass, Inc. of Schaumburg, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-08b be awarded to Prime Architectural Metal and Glass, Inc. for a total award amount of Four Hundred Twenty Thousand Three Hundred Dollars \$420,300.00.**
10. **Bid Package #1-09a Ceramic Tile:** Two (2) Bids were received. TSI Commercial Floor Covering, Inc. of Champaign, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-09a be awarded to TSI Commercial Floor Covering, Inc. for the base bid amount of Twenty-Four Thousand Four Hundred Dollars \$24,400.00.**
11. **Bid Package #1-09b Acoustical Ceilings & Treatments:** Two (2) Bids were received. Heitkotter, Inc of Montgomery, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-09b be awarded to Heitkotter, Inc. for the base bid amount of Two Hundred Fifty-Six Thousand Five Hundred Fifty Dollars \$256,550.00.**
12. **Bid Package #1-09c Resilient & Carpet Flooring:** Six (6) Bids were received. Douglas Floor Covering, Inc of North Aurora, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-09c be awarded to Douglas Floor Covering, Inc. for the base bid amount of Three Hundred Sixty-Six Thousand Three Hundred Eleven Dollars \$366,311.00.**
13. **Bid Package #1-09d Terrazzo Flooring & Base:** Four (4) Bids were received. Menconi Terrazzo, LLC of Bensenville, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-09d be awarded to Menconi Terrazzo, LLC for the base bid amount of One Hundred Thirty-Nine Thousand Seven Hundred Dollars \$139,700.00.**

Mary Medjo Me Zengue  
Director  
Addison Public Library  
December 12, 2024  
Page 3

14. **Bid Package #1-09e Painting:** Four (4) Bids were received. J & M Decorating, Inc of Addison, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-09e be awarded to J & M Decorating, Inc. for the base bid amount of Eighty-Nine Thousand Nine Hundred Sixty-Seven Dollars \$89,967.00.**
15. **Bid Package #1-21 Fire Protection –** Four (4) Bids were received. Ram Fire Protection, Inc. of Addison, IL submitted the low as read bid at \$106,700.00. Ram Fire Protection failed to acknowledge Addendum #3 & #4 on the bid form. A scope review meeting was held with Ram Fire Protection, and it was determined that the bid submitted by Ram Fire Protection did not comply with the contract requirements. FQC recommends that the bid submitted by Ram Fire Protection be rejected as non-responsive. The next bidder was Nelson Fire Protection Co of Rockford, IL. in the amount of \$112,870.00. A scope review was held with Nelson Fire Protection Co. There are no irregularities with the bid presented. **We recommend that BP #1-21 be awarded to Nelson Fire Protection Co for the base bid amount of One Hundred Twelve Thousand Eight Hundred Seventy Dollars \$112,870.00.**
- 16 **Bid Package #1-22 Plumbing -** Two (2) Bids were received. Helm Mechanical of Westmont, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-22 be awarded to Helm Mechanical for the base bid amount of One Hundred Fifty-Eight Thousand One Hundred Fifty Dollars \$158,150.00.**
- 17 **Bid Package #1-23 HVAC –** Ten (10) Bids were received. MG Mechanical Contracting Inc. of Woodstock, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-23 be awarded to MG Mechanical Contracting Inc. for the base bid amount of One Million Seven Hundred Twelve Thousand Dollars (\$1,712,000.00).**
- 18 **Bid Package #1-26 – Electrical & Low Voltage –** Six (6) Bids were received. Eco Lighting Services and Technology, LLC of Oak Forest, IL submitted the low responsive and responsible base bid. There are no irregularities with the bid presented. **We recommend that BP #1-26 be awarded to Eco Lighting Services and Technology, LLC for the base bid and the accepted Alternates #1 provide new strip lights & #2 replace all data cabling for a total award amount of One Million Five Hundred Ninety-Five Thousand Eight Hundred Twenty Dollars (\$1,595,820.00).**
- 19 **Bid Package #1-32 Landscaping:** One (1) Bids was received. Twin Oaks Landscaping of Oswego, IL submitted the low as read bid. It was noted at time of reading that they did not provide a qualification Statement which was required with their bid, but following our scope review meeting they submitted the required form. There are no irregularities with the bid presented and is the low responsive and responsible bidder. There are no irregularities with the bid presented. **We recommend that BP #1-32 be awarded to Twin Oaks Landscaping for the base bid amount of Twenty-Two Thousand Sixteen Dollars \$22,016.00.**

The total value of the awards recommended above is \$8,190,710.00, versus a budgeted amount of \$8,565,890.00 for these trades. The award of these trade contracts is \$375,180.00 under the budgeted amount.

If the above meets with your approval, please sign and return one copy of this correspondence indicating your acceptance of the recommendation. Upon receipt of your approval, Frederick Quinn Corporation will issue letters of intent to the awarded trade contractors and prepare contracts with the approved contractors for execution by the Library. The award amounts will be incorporated into the project budget, which will be updated and provided to APL.

Sincerely,

FREDERICK QUINN CORPORATION

  
Frederick J Marano  
Executive VP / Estimating

Mary Medjo Me Zengue  
Director  
Addison Public Library  
December 12, 2024  
Page 4

CC: Brooke Sievers / APL  
Dan Porte / Product Architecture +design  
Jack Hayes / FQC  
John Eallonardo / FQC  
John Barrett / FQC  
File / FQC

**ACCEPTANCE:** \_\_\_\_\_ **Date:** \_\_\_\_\_































# Frederick Quinn Corporation

## Bid Tally

Trade: BP #1-23 HVAC  
 Project: Addison Public Library  
 FQC # 562

Subcontractor				Base Bid		Alternate #4	Alternate #5	Alternate #6	Alternate #7	Alternate #8	Alternate #9	Alternate #10	
	10% of Bid	Certifications	Qualifications		Addendum 1, 2, 3 & 4	Unit pricing Provided	RTU Substitution	Chiller Substitution	Pumps & Hydronic Accessories Substitution	VFD Substitutions	HW Boiler Substitution	Digital Temperature Controls Substitution	Breakout cost of the Base Design Digital Temperature Controls
C. Acitelli Heating and piping, Inc. Villa Park, IL	x	x	x	\$ 1,758,000.00	x		No Bid	\$ 9,000.00	\$ (10,000.00)	NB	\$ (6,000.00)	NB	\$ 545,000.00
AMS Industries, Inc. Woodridge, IL	x	x	x	\$ 1,740,425.00	x		No Bid	NB	NB	NB	NB	NB	\$ 545,000.00
Helm Mechanical, Westmont, IL	x	x	x	\$ 1,947,000.00	x		No Bid	\$ 4,800.00	NB	NB	\$ 13,700.00	\$ (207,000.00)	\$ 545,000.00
Ideal Heating Co, Brookfield, IL	x	x	x	\$ 2,005,333.00	x		No Bid	NB	NB	\$ (3,500.00)	NB	\$ (250,000.00)	\$ 545,000.00
CT Mechanical, LLC, Addison, IL	x	x	x	\$ 1,745,000.00	x		No Bid	NB	NB	NB	NB	\$ (200,000.00)	\$ 545,000.00
FE Moran, Inc. Northbrook, IL	x	x	x	\$ 1,722,000.00	x		No Bid	NB	\$ (8,000.00)	\$ (3,000.00)	NB	\$ (230,000.00)	\$ (545,000.00)
Complete Temperature Systems, Bridgeview, IL	x	x	x	\$ 2,347,000.00	x		No Bid	NB	NB	NB	NB	NB	\$ (445,000.00)
Jensens Plumbing and Heating, Woodstock, IL	x	x	x	\$ 2,000,000.00	x		No Bid	\$ (1,300.00)	\$ (13,000.00)	NB	NB		\$ (545,000.00)
<b>MG Mechanical Contracting, Inc. Woodstock, IL</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>\$ 1,712,000.00</b>	<b>x</b>		<b>No Bid</b>	<b>\$ (5,000.00)</b>	<b>NB</b>	<b>NB</b>	<b>NB</b>	<b>\$ (242,000.00)</b>	<b>\$ (545,000.00)</b>
Amber Mechanical Contractors, Inc. Alsip, IL	x	x	x	\$ 1,724,000.00	x		No Bid	NB	NB	NB	NB	\$ (200,000.00)	\$ (546,000.00)





12.5.24

# Memorandum: Recommendation to Award

## Addison Public Library Furniture: Interior Renovation

Board of Trustees  
Addison Public Library  
4 Friendship Plaza  
Addison, IL 60101

Trustees:

On December 3, 2024 at 1:00 pm, the library accepted and opened bids for 2 separate furniture bid packages for the interior renovation project at the library.

Product Architecture + Design confirmed with the low bidders that they included everything.

### **Bid Package 1: Open Lines**

We received 3 bids for furniture that is considered to be “open lines”, meaning that these manufacturers will allow any dealer to sell and install their products. The low bidder was Continua Interiors with a total base bid of \$252,685.63. We have reviewed their bid with them and find it to be complete. Bids are listed below for this package.

Interiors for Business	\$254,614.16
Thomas Interiors	\$269,144.06
Continua Interiors	\$252,685.63

### **Bid Package 2: Shelving, end panels, 3 Branch furniture**

This package was for new display, minimal new end panels, and 3 Branch custom items. There was one bid from LFI for of \$171,969.00 .

**KI furniture:** KI sells direct to owners and doesn't require a dealer. They provided a quote of \$116,161.53

**Haworth furniture:** BOS has provided all Haworth furniture to the library since the building was built. All of the staff workstations are Haworth, and some public furniture is also by Haworth. This is purchased on a governmental contract. In addition, BOS is the preferred Haworth dealer in the Chicago area. The price of the furniture product is \$120,213.85. And the labor was previously approved at \$54,858.11.

**Spacesaver Shelving: Bradford Systems:** All of the bookshelving in the library, other than display shelving, is by Spacesaver. Bradford Systems is the only company who can sell and install Spacesaver products. They are providing some new shelving for public areas and all new shelving in storage areas. They provided a quote of \$91,209.14.

**Library-purchased items:** We are recommending a budget of \$26,000 to reupholster 2 chairs and for some sensory pieces on the play structure.

**Contingency:** Because the furniture is phased over the next 16-18 months, there will likely be some price increases on furniture. It will be less expensive to pay for price increases as they come than to pay for storage of the furniture. We are recommending a contingency of \$30,000 for potential price increases.

The total project budget is listed below, assuming that the Board approves the dealers recommended by Product.

BOS (Haworth installation)	\$54,858.11
BOS (Haworth product)	\$120,213.85
KI	\$116,161.53
Continua Interiors (Bid package 1)	\$252,685.63
Library Furniture International (Bid Package 2)	\$171,969.00
Bradford Systems	\$91,209.14
Contingency	\$30,000.00
owner purchased items	\$26,000.00
<b>TOTAL</b>	<b>\$863,097.26</b>

We look forward to completing this project. Please contact me with any questions-



Tiffany Nash  
Partner, product architecture + design

We received four proposals in response to the Request for Proposals (RFP). All four arrived by their due date (10/15/24). In the [RFP](#), we requested each vendor include specific features and explanations as to how their products function.

The AMH Selection Committee reviewed and rated all four proposals. The Committee narrowed down the four proposals to the top two and then visited a library using each of the top two vendors.

Based on these visits, the cost of the AMH, the vendor’s response to the RFP, and the vendor’s ability to meet our functionality requests, **we recommend that the Board of Trustees accept bibliotheca’s proposal for a flex AMH 9-bin with bulkSeparator for \$212,016.37 and the fee for removing the existing AMH in the amount of \$3,842.45.**

Below is a summary of the differences among the vendors. We requested and reviewed more features than what is listed below, but these were our “must-haves”.

Vendor	5-year price	staff induction with printer, barcode scanner, and RFID	bulk return	multiple saved sort strategies available	notifications sent to staff when AMH is full or malfunctions	fits in GS workroom in the allotted space
bibliotheca	\$245,061.87	x	x	x	x	x
FE Technologies	\$259,493.00	x	x	x	x	
Tech Logic	\$240,163.94		x	x	x	x
Envisionware	\$466,314.00	x	x	x	x	x

The phasing plan for the building project has changed since we first began speaking with AMH vendors. We now expect a November 2025 (originally planned for June 2025) installation date. Bibliotheca has confirmed that they will hold pricing with a signed contract and deposit.

The AMH Selection Committee consists of:

- Kathy Welko, Head of Guest Services
- Jenny Cuevas, Head of Materials Management
- Karen Dini, Collection Development Manager
- Jack Kelderhouse, IT System Administrator
- Brooke Sievers, Assistant Director



## Addison Public Library

**Automated Materials Handling (AMH) System and Related Installation, Training, and Support Services**

October 15, 2024

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October 14, 2024

Brooke Sievers, Assistant Director  
Addison Public Library  
4 Friendship Plaza  
Addison, IL 60101

**Re: Automated Materials Handling (AMH) System and Related Installation, Training, and Support Services**

Dear Brooke:

This is an exciting time for Addison Public Library (APL) as you get ready for a major renovation. Over the past few months, we have diligently worked to learn more about your goals so we could put together a solution that will work for the library. A lot of effort from the team has gone into creating a solution that will not only fit perfectly in the space, but also offer the greatest amount of efficiency needed to handle the job, as the current sorter has for so long.

As library technology has expanded, Bibliotheca stays current with trends. Some good steps in that development took place during our conversations about the innovative ideas the APL team has around design and functionality.

Bibliotheca proposes a modern drop-and-go AMH system that will be reliable and easy to use for patrons and staff. The new flex AMH system will be a game-changer, as it facilitates getting items back onto the shelves (and into patrons' hands) quickly. Bibliotheca will ensure a smooth implementation so that the library staff can spend time on what's most important: your community.

The recommended flex AMH with bulkSeparator provides true bulk induction of items – meaning a patron can return stacks of items, which are then quickly checked in and cleared from the patron account. Please note that some AMH systems have a tiny induction area that only allows for the return of one or two items at a time. This is not ideal for the parent returning a stack of picture books or the avid reader returning 10-15 items at a time.

Bibliotheca's investments in AMH solutions have allowed us to create a stable and robust system that is accurate and will be there for the long term. **Nearly 20 years of continuous improvement have made our proposed flex AMH the best system** to maximize efficiency and improve service. APL has used our solutions for 15 years, so you know firsthand how they are built to last.

Experience is crucial to meeting your goals. Bibliotheca has more library experience and **a deep bench of AMH-focused support staff and local, certified on-site technicians**. We have 11 on-site technicians located in the Midwest to meet your needs, and your team appreciates your local tech's knowledge of your library and equipment. You can think of the Bibliotheca team as an extension of your technology team.

I've learned a lot about libraries and their systems from Addison Public Library during the past year. I want to thank you for your kindness toward me and for being a phenomenal partner and advocate for our solutions for so many years. We look forward to continuing to partner with your community. If you have any questions about our proposal, please reach out to Katie Westfall, Bid Manager, [k.westfall@bibliotheca.com](mailto:k.westfall@bibliotheca.com), 800-328-0067, x1301.

Sincerely,



Nate Janney, Account Executive  
Bibliotheca, LLC

## Executive Summary



Addison Public Library (APL) needs to implement an intuitive self-service model that greatly benefits both staff and patrons. Bibliotheca provides intuitive solutions and expert guidance. We keep you informed about new technologies and help you find the right fit. As you navigate this technology purchase, we'll be there to consult with you throughout the project, so your investment aligns with your goals. Bibliotheca does not charge fees for project management, travel, hotels and meals. We believe that APL will have a better experience when unlimited communication opens up

Addison Public Library is a valued customer for 15 years. We understand your library and look forward to building the foundation for increased productivity and efficiencies. As you know, Bibliotheca solutions are built to last, and we are

excited that Addison Public Library can now experience the next generation sorter system. You know your local on-site technician. By staying with Bibliotheca, APL will get the same great service, and your technician won't have a learning curve when it comes to providing service to the library.

Bibliotheca proposes a 7-bin and 9-bin flex AMH with bulkSeparator to meet APL's specifications. Here are key differentiators between the flex AMH and other solutions:

- AMH Designed for Libraries. The flex AMH's conveyor system features belts and diverters designed to process numerous material types and sizes – even dog-eared items – without catching or causing damage. We've designed our system with standard, non-proprietary parts, so if something needs to be fixed, it's fast and easy. The open space beneath the system makes it easy for staff to maintain and access all parts of the system.

Some vendors offer systems that were originally designed for industrial or commercial applications. Bibliotheca's solutions are designed specifically for libraries, so it is tailored to your needs.

One way you know flex AMH is designed for libraries is that our horizontally oriented optical sensors do not require daily cleaning. Other vendor's sensors are oriented vertically, so dust gathers in the sensor and erroneously triggers it, causing back-ups and downtime.

- Multiple Configurations. Our flex AMH system configuration software interfaces with your ILS through a SIP2 connection and can separate materials according to the library's programmed criteria. Staff can design up to seven different sort programs, based on an unlimited number of sort rules and sort exceptions that can be scheduled for specific times of the day or days of the week according to your library needs.
- Auto Clean-up Mode. This function allows the flex AMH™ to overcome minor errors without the entire system becoming inoperable. Clean-up mode greatly reduces the number of times a staff member gets involved – when the flex AMH™ finds an error it will create pathways to

clean up items by reversing belts and then returning them to standard operation. This can clear any stuck or misplaced items without staff intervention.

- **Staff Wellbeing.** Our flex AMH™ has the following certifications: CE, FCC, RCM. flex AMH™ is a very safe system to operate – operator safety is designed into the equipment. For example, flex AMH™ has multiple Emergency Stops at every induction point and along the conveyor belts. All motors are located behind metal enclosures. We follow OSHA and ANSI safety standards.

The flex AMH™ system operates at less than/equal to 55dB per module, measured in 1m distance without books falling into the bins, and approximately 35-40dB when the system is in standby mode, providing a quiet and pleasant work environment for your staff.

If the staff encounters a problem when using the flex AMH™ unit, they can quickly shut down the moving parts of the system (drives, solenoids) by pressing one of the emergency stop buttons, stopping any movement that may be dangerous. Emergency stop buttons are installed so that at least one can be easily reached from any place around the flex AMH™ system. Once pressed down, the button will be locked into place.



With Bibliotheca, increasing productivity has never been easier. The flex AMH is part of our ecosystem of solutions, so you can be sure that it will work in harmony with your other Bibliotheca solutions. Choosing the right technology provider to meet the future needs of your unique community is critical to staying relevant and ahead of the curve.

Beyond technology, we are committed to libraries and what they stand for.



### **Social + Community Responsibility**

We facilitate user-friendly, 24/7 access to physical and digital materials inside and outside the library, and we make it possible for libraries to centralize their technology and content management for seamless workflow, real-time status awareness, and on-the-go updates. We develop and model innovation and best practices from libraries around the corner and across the world, with the aim to foster equality within communities, regions, and countries.



### **Environmental Sustainability**

Bibliotheca designs and builds easily updatable products featuring low power consumption and extreme durability from sustainable materials.



### **Global Equity**

We empower libraries to learn about innovation and best practices from other libraries near and far, to help reduce inequality within communities, regions, and countries around the world.

## Company Information

Vendors shall provide information that documents their firm's experience and capacity to produce the required outcomes. A vendor is defined as the company, entity, or partnership that is submitting a proposal under this RFP, not individual companies in a partnership or joint venture.

This information shall include:

- **Form of ownership.**

Bibliotheca is wholly owned by Bibliotheca GmbH.

- **The number of years the Vendor has been in business under its current name.**

Thirteen. Bibliotheca GmbH was formed in June 2011, when three leading library technology companies merged.

- **Corporations shall provide a Certificate of Good Standing from the Secretary of State, or equivalent documentation, showing the company is fully compliant with its filing requirements and is in good standing with the state in which it is incorporated.**

Please see the Additional Information section.

- **Describe the length and nature of the Vendor's experience in providing the products and services requested in this RFP.**

Bibliotheca is a large, stable company that has served the library community for more than 55 years. Our global support for libraries and history of innovation confirms our long-term commitment to libraries.

In 1992, Bibliotheca (formerly 3M Library Systems) began marketing self-checkout systems to libraries, and we quickly recognized that it could be difficult for these types of devices to communicate with integrated library systems (ILS) due to unique communication protocols. We knew that a lack of compatibility could hurt libraries, so we developed SIP to facilitate communication between devices and your ILS. Rather than make this a proprietary standard, we made it available for free to all vendors and then did the same with SIP2. Later, we allowed NISO to use SIP2 as the basis for the NCIP standard.

Since the launch of our first SelfCheck™ system, we have worked with all major ILS vendors to ensure the continued compatibility of our products with their systems.

We began full commercialization of RFID products for libraries in 1999. Since then, we have installed RFID systems at thousands of libraries around the world, including many libraries in your area. Our efforts in research, design and human factors engineering have been awarded several patents for this pioneering work.

- **Names of all partners or investors and how long each has been in existence.**

None. Bibliotheca is wholly owned by Bibliotheca GmbH.



## Description of Proposed Solution

The proposed solution must include the following:

- **Internal, book-drop style patron induction with sufficient aperture to accept most oversized books. The induction should not have a screen or receipt printer. The induction needs to accept multiple items at once.**

Provide true drop-and-go item return with the flex AMH – meaning a patron can return stacks of items, which are then quickly checked in and cleared from the patron account. There is no touchscreen and no receipt, so patrons can get on their way quickly.

Please note that some AMH systems have a tiny induction area that only allows for the return of a few items at a time. This is not ideal for the parent returning a stack of picture books, or the avid reader returning 10-15 items at a time. The book slot available to patrons measures H: 145 mm / 5.7 in. | W: 380 mm / 14.9 in.

- **External, book-drop style patron induction with sufficient aperture to accept most oversized books. The induction should not have a screen or receipt printer. The induction needs to accept multiple items at once and function during inclement weather (e.g., rain, snow, ice, wind).**

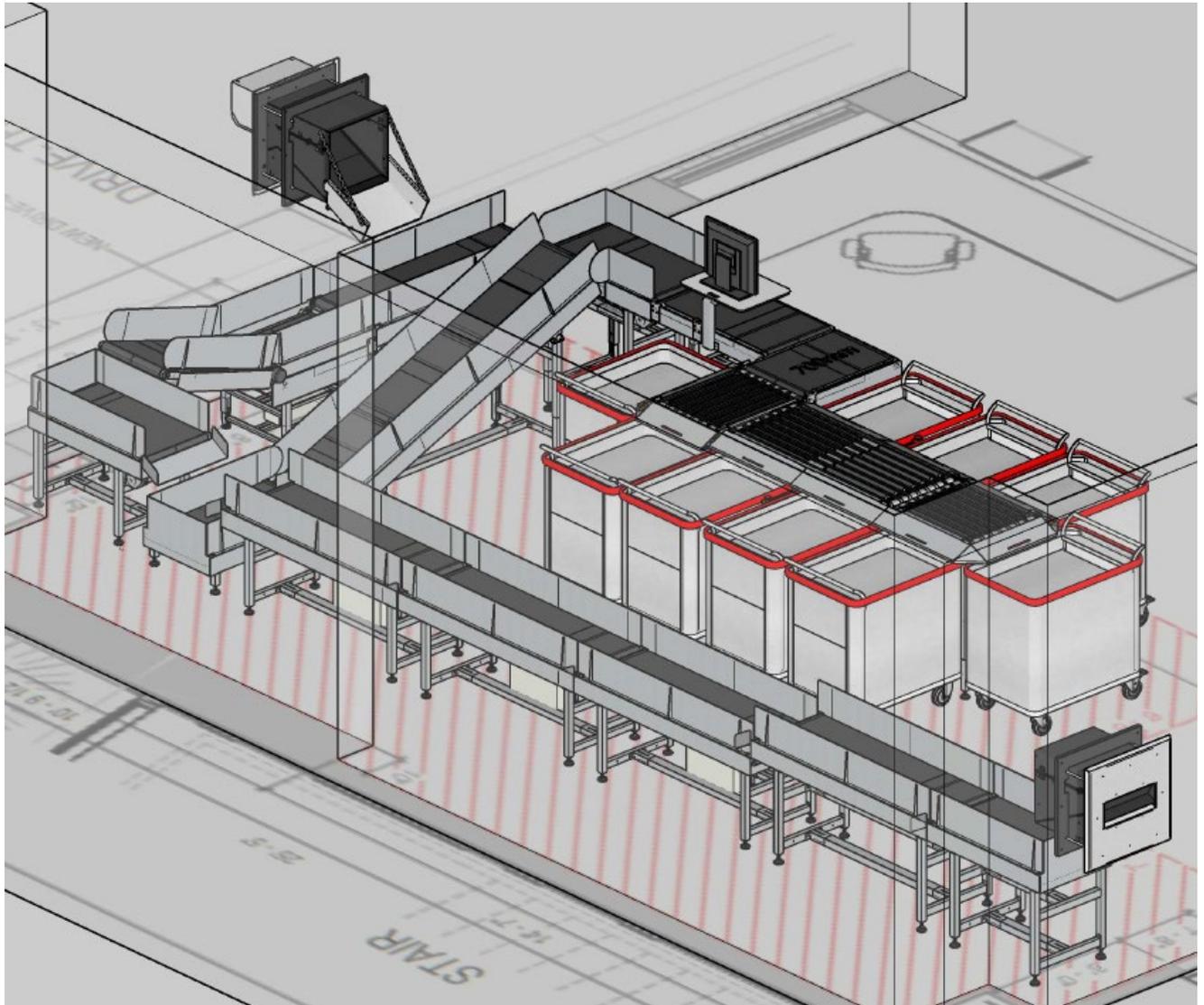
Please see the previous answer in regard to aperture size and the ease of drop-and-go return with flex AMH.

External patron returns are rated at IP53 when the book-slot door is closed. When the book-slot door is open to accept items, it is susceptible to ingress by foreign objects and water, especially driving rain. We strongly recommend all external units be fitted with a protective covering, e.g. canopy, awning, building overhang, vestibule, etc. These devices also provide convenience and protection for library patrons using the system during inclement weather.

Please see the following pages for details on the proposed layouts.

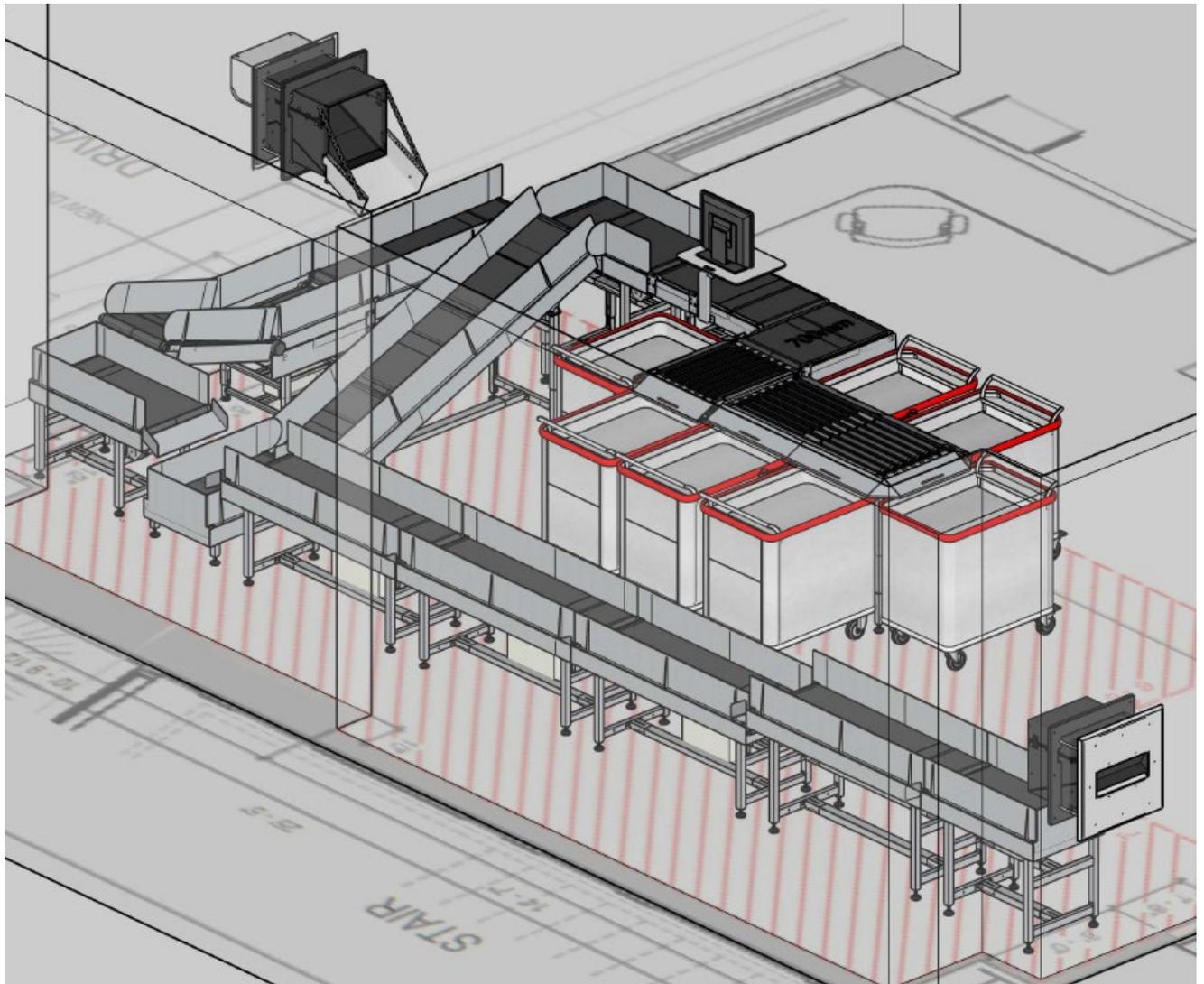
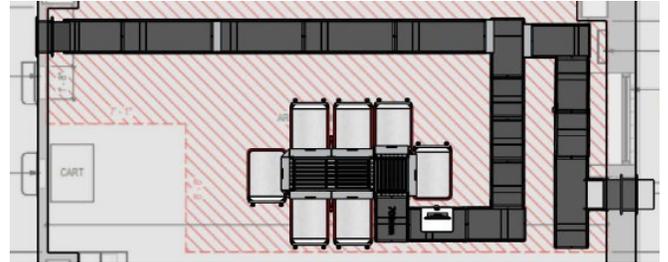
### Layout 1: flex AMH 9-bin with bulkSeparator

This system makes the most of your space and connects the interior and exterior book drops to provide an extremely efficient bulk item separation system. flex AMH bulkSeparator gives back staff time by separating and sorting items according to ILS feedback. Staff can also induct items into the flex AMH at the staff station (using barcode or RFID) or at the autofeeder section where patrons induct items.



Layout 2: flex AMH 7-bin with bulkSeparator

This compact system makes good use of the current space, with all the benefits of the 9-bin for a more economical price.





## flex AMH™

Create the perfect return and sorting solution that is configured to fit your space and budget. We simplify the materials handling process, so you can evolve your service and deliver the best overall library experience for your community. Touchscreen and drop-and-go patron inductions available.



Completely customized for you  
Our fully modular design allows us to create any type of solution to fit your specific space.



RFID and barcode-based  
There is no need to convert your collection to a specific format in order to start taking advantages of efficient return & sorting processes at your library.



## flex AMH™ bulkSeparator™

**Share the gift of time with multi-item patron returns.** The flex AMH™ bulkSeparator™ is the ultimate in drop-and-go convenience. Once items are placed in a standard patron return shoot, all items are separated, sorted and placed into the proper return bin – reducing the time it takes to return items to the shelves.



**Accurate sorting**  
Allows staff to return items to the shelves easier and faster. Choose from an unlimited number of rules and exceptions for your sorting criteria.



**Real-time monitoring**  
Remotely monitor the system with flexVisualizer™, providing quick information and an instant virtual view of the configured AMH system.



**Completely customized for you**  
Our fully modular design means your flex AMH™ solution fits your workflows and specific space.



**Multiple-item induction**  
Saves patrons time by allowing them to deposit a stack of items at once instead of one at a time.



## flex bookDrop™ RFID

The flex bookDrop™ is an exterior multi-item return that **increases circulation and improves productivity for libraries.** With its real-time check-in feature and easy-to-use interface, customers and staff can be sure items are instantly checked in upon return. The system also automatically continues to function and retain information if the network or integrated library system goes offline.



Items are instantly checked in and removed from customer's record upon return

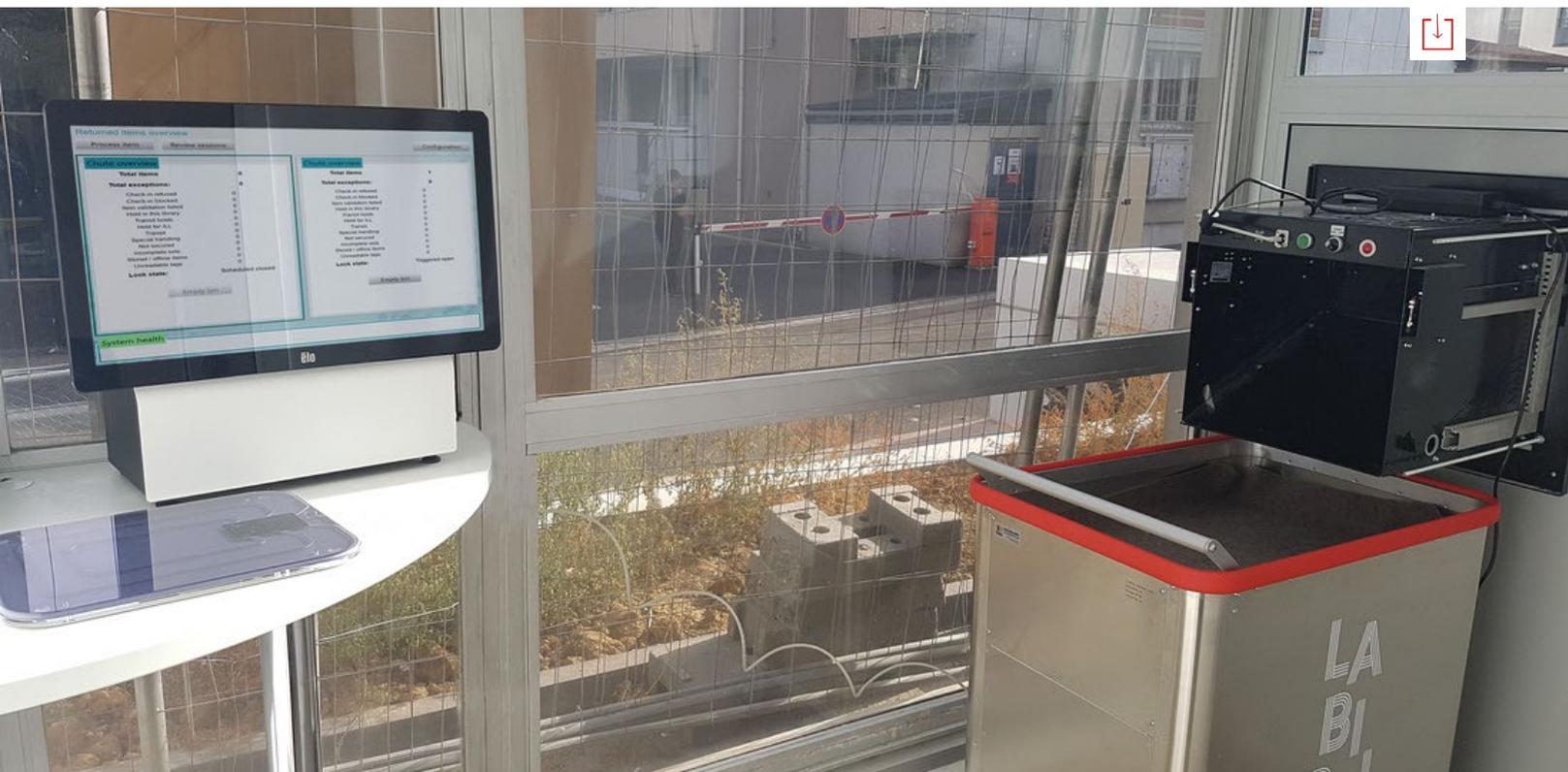
Can be implemented into a wide range of architectural models



Extended Faceplate, no lock



Standard Faceplate, manual or electrical



- **A height-adjustable staff induction with a barcode scanner and RFID reader.**

Our recommended solution does not require staff members to induct items at a single point in the system. The library staff will be able to set items at multiple points along the conveyance eliminating the need for a height adjustable induction point.

Bibliotheca will work with APL on the workflow for barcode items, which includes adding a library-provided barcode scanner to the PC of the staff station computer to scan any items, print hold slips, etc.

- **Description of bin system based on the recommendation of the Vendor. Include options for 7 and 9 bins. Include options for spring-loaded bins and bins that use electric power to raise the bin floor.**

We've included options for 7 and 9 bin flex AMH configurations. Please see the flex AMH layouts on pages 8 and 9.

Each bin can easily pull away from the docking station, allowing staff to smoothly glide them around the workroom. All bins have two rear swivel casters for ease of movement.

The spring-loaded base also provides a sponge-like reflex, gently protecting items from being damaged as they are sorted into the proper location. This means that all items drop a minimal height into the bin and are less likely to be damaged without limiting bin capacity. In addition, as items are removed, the bottom of the bin rises, reducing the necessity for staff members to reach. Spring tension can be adjusted to meet the needs of the library.

We take into consideration your space and requirements when creating layouts and suggesting bin types. Our return bins promote wellness with floors that raise materials to a comfortable height for staff members, resulting in less bending and repetitive motion.

The flex AMH autoBin is a height-adjustable electric bin that allows simple and efficient transportation of books in libraries. The flex AMH autoBin features two fixed casters at the front and two steering casters, each with a total lock at the rear.

- **Allows staff to choose between two or more sorting strategies depending on need.**

During the initial installation of the new flex AMH™ system, Bibliotheca will work with your staff to configure up to seven sort criteria, based on an unlimited number of sort rules and sort exceptions, which can be turned on or off on the fly by staff. The library can determine what conditions will determine if the item should be sent to the exceptions bin, such as, items with Holds on them, non-RFID tagged items, multi-part sets that are missing an RFID tagged item, lost items, and many more. In most cases the library can determine if they want these items being sent to an exceptions bin to be checked-in or remain in their current checked-out status.



- Ability to send notifications via email when the AMH is not functioning as expected or a bin is full.

**Streamline your workflow and increase visibility into your whole system** with libraryConnect™ link. Cloud-based libraryConnect LINK central management allows you to monitor connected Bibliotheca equipment and gain insight so you can do more with your data. This powerful tool allows you to remotely manage and configure library equipment and aggregate data from all of your Bibliotheca products. The user-friendly dashboard provides at-a-glance health status of equipment, while the configuration tools allow you to apply workflow changes, customize appearance and easily compile graphical reports across all devices from one central hub.



Make data-driven decisions by compiling data from all devices.



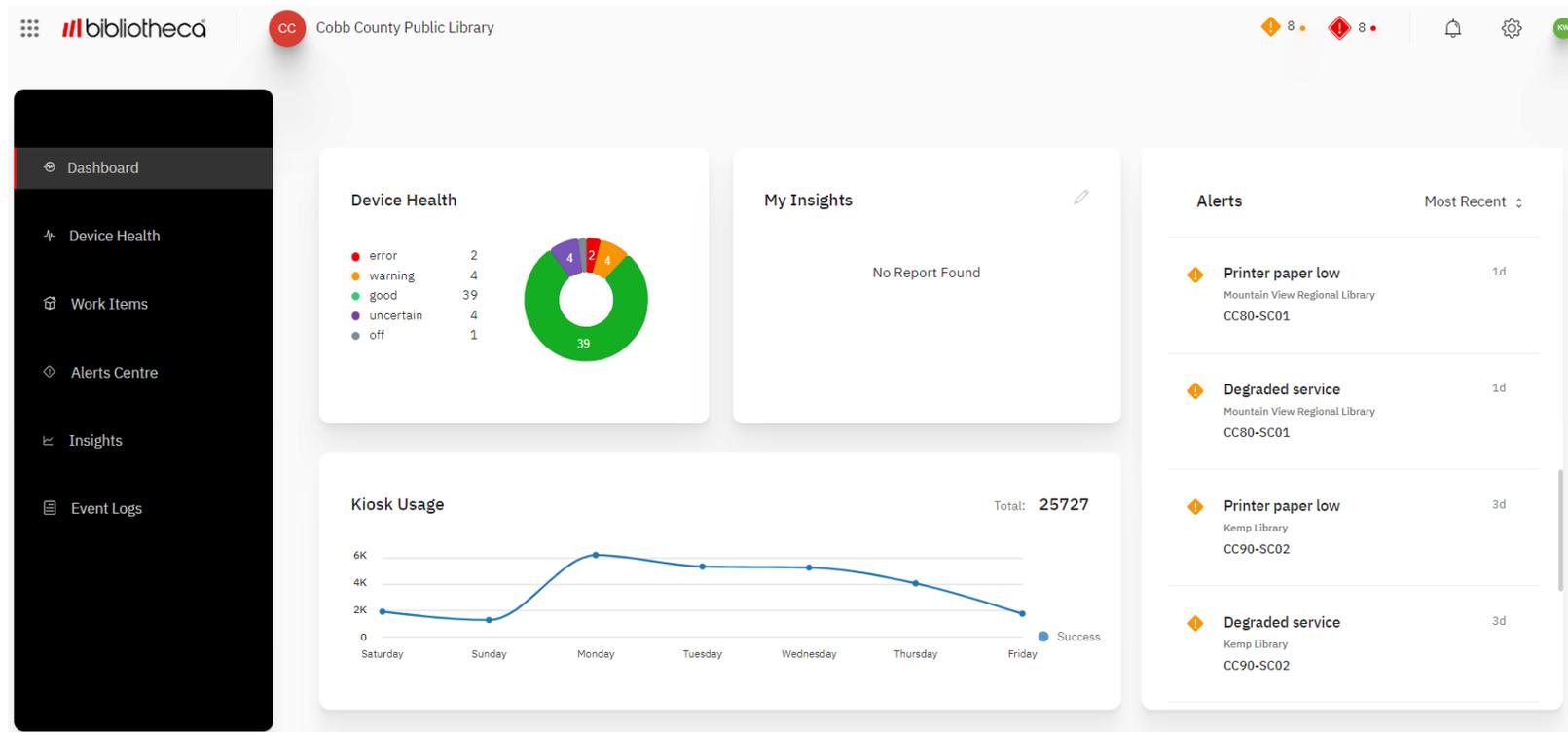
Replicate software configurations across multiple devices, branches, or an entire system.



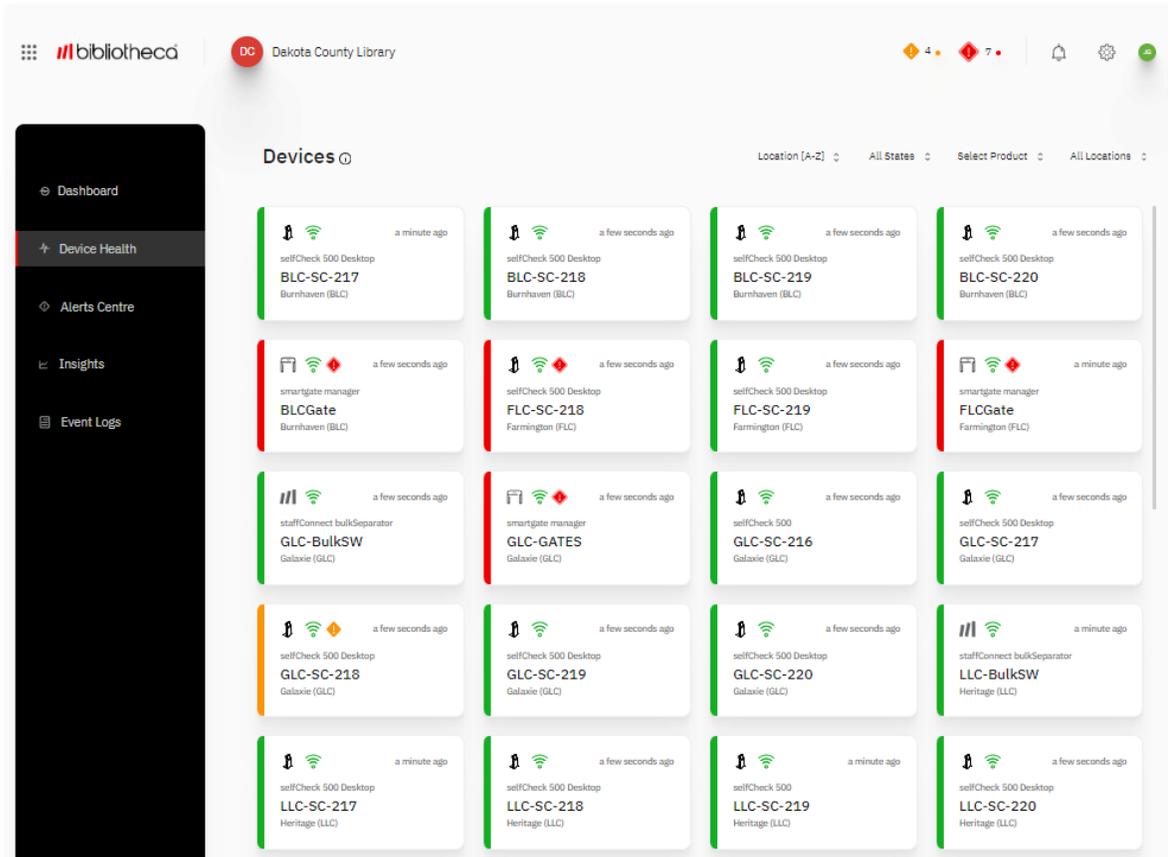
System alerts with email and instant SMS messaging when equipment needs attention.



Easily track and diagnose problems. Access the online customer support portal and submit help desk cases and track status.



libraryConnect link is our central management solution that allows you to view system health and status of connected devices.



quickConnect™ AMH works seamlessly with libraryConnect™ LINK, delivering valuable analytics and reporting from flex AMH™ systems located in multiple branches.

Other benefits for library staff include:

- View real-time updates from any location with ease
- Configure and manage flex AMH™
- Pull monthly reports for data-driven analysis

Staff can be alerted via email or text. Alerts are available for the following statuses:

- Feeder not ready
- Return not ready
- Bin Missorted
- Bin not available
- Return bin full
- Bin Blocked
- Bin capacity threshold
- Bin Missorted / Full
- Bin Mismatch
- Bin Missorted
- Capacity (% is set at installation)
- Device out of service
- AMH connection lost

Below: Sorting Layout tab displays the current state of all bins in the sorting line.



- **System provided transaction logs and detailed statistics reporting.**

With our central management web portal, libraryConnect LINK, your staff can create consolidated reports and make data-driven decisions based on usage trends.

Easily view detailed information on flex AMH™ transactions and bin sorting options. The Bin Sorting report allows the user to view how many items have been returned to each specific return bin, during a configured date range and separated into configured time intervals – 5 minutes, Hours, Daily, Monthly and Yearly.

Reports are available in table or graph format, or both. Reports can then be exported into a variety of document formats: XML file with report data, PDF, MHTML (web archive), Excel, TIFF file, and Word. If you need a csv file, simply export it into Excel and save it as a csv file.

- **Ability to separate stacked items.**

With the flex AMH bulkSeparator™, libraries can offer a quick, simple drop-and-go return solution, an experience familiar to users. With the natural use of gravity and vibration, the bulkSeparator efficiently separates items for accurate processing. Lastly, free staff from manual processing labor for more meaningful tasks in the library.

- **Specify the separation accuracy for the proposed layout(s).**

Check-in Accuracy means that at least 99.5% of items with working RFID tags which are deposited in the bulkSeparator will be read and checked in by one of the embedded RFID antenna in the system.

Sorting Accuracy means that at least 99.8% of items that are separated into a bin from the bulkSeparator for further sorting will be checked in and sorted into the correct bin, based on the RFID tag located on each such item.

## General and Technical Requirements

Please indicate whether the proposed solution includes the following features/functionality:

- **Interoperability with SirsiDynix Symphony via SIP2 or API connectivity.**

Yes. flex AMH software supports LMS/ILS protocols SIP2 and NCIP and is data model independent.

- **Ability to print hold and transit slips at the staff induction without the item needing to be sorted into a bin.**

Yes. Printing of hold slips for RFID items is available. The flex AMH with bulkSeparator comes with a holds slip printer. Barcode items can be processed through a barcode scanner attached to the staff station. In this workflow barcode items are visibly identified and taken to the staff station at the AMH and processed.

- **Ability to add length for additional bins in the future.**

Yes. Completely customized for you, our fully modular design allows us to create any type of solution to fit your specific space. bibliotheca's fully modular design allows us to create any type of solution to fit your current space and offers you the flexibility to easily add additional modules (conveyors, return units, sortation tables and bins) in the future. We designed flex AMH™ and flex bookDrop™ specifically to meet the needs of growing library systems. Adding on in the future will be cost-effective and efficient.

Here is just one of many examples of the flexibility of our flex AMH™ solution's modular qualities:

According to Richmond Hill Public Library, Dianne McLeod, Manager of Technologies – Digital Services: “The flex AMH was delivered Monday morning, and by 4:30 in the afternoon the entire 17-bin system was assembled and installed,” said Dianne McLeod, Manager of Technologies – Digital Services. “After it was set up, we realized that we needed to move it away from the wall a few inches to allow for more flexible movement of the bins. It took only an hour for the system to be dismantled, moved and put back together. It was a bit like watching Legos being fitted together.”

We've built a better AMH solution with 1/3 fewer parts than other systems, making the flex™ AMH quieter, quick to install and easy to maintain and expand.

- **Use of remotely accessible cameras by Vendor used in the proposed solution.**

Yes. We would be happy to discuss with APL where and how to provide cameras to view the system remotely. One cost-effective suggestion is for the library to source a separate camera system for a good price.

- **The operating system and other applications included are updated by Vendor and serviced at no cost to APL.**

Yes. Service and maintenance agreements cover hardware and software solutions developed and manufactured by Bibliotheca. PC operating systems (OS) fall outside Bibliotheca service and maintenance agreements as OS functions are driven by Microsoft.

Bibliotheca will support the operating system for the life of the system if the operating system manufacturer supports it and the library is on an active service and maintenance agreement. If the operating system is no longer supported by Microsoft, Bibliotheca will work with the library to upgrade the OS for a fee.

To avoid compromising security policies, we recommend the installation of the customer's anti-virus software on the relevant PCs. Please note: Bibliotheca is not responsible for maintaining or updating the operating system or applying customer-specific applications such as anti-virus, as these sit on the customer network.

- **Description of how adjustments are made to the sorting software and System.**

Due to the complexity of the flex AMH system's internal software we strongly recommend that the staff does not access configuration software, but instead contact Bibliotheca for assistance. Bibliotheca's internal remote help desk team will be able to remote into the system using VSA Remote Client or Team Viewer. We can configure and control from our site.

- **The AMH system must be compatible with the ISO/IEC 15693 and ISO/IEC 18000-3 Mode 1 standard and with the NISO standard ISO-28560-2 tag data format.**

Yes. Bibliotheca's solutions lead the industry when it comes to quality and reliability. Our equipment reads most standard tag types that meet ISO 15693, ISO 18000-3-A (NXP SLI, SLIx, SLIx2). Understood. All Bibliotheca products have supported the ISO 28560-2 data model since its inception and adoption back in 2012. The majority of Bibliotheca's global customer base, 30,000 libraries, use this data model.

- **AMH equipment must be UL listed, OSHA certified.**

The flex AMH system components are UL certified.

Certification rules are very clear and not open to interpretation: the "whole" finished product must be tested and passed for compliance. With this in mind, please be wary of complex AMH systems on the market that claim to be UL certified for the whole system. It may be that individual components are certified (just as ours are), but the whole system may not be – especially if the design has been customized to your requirements.

If the library would like the system certified in place, there is an additional cost.

- **The proposed system must not interfere with the other equipment, automated library system clients, or PCs that may be nearby.**

The proposed flex AMH system will not interfere with your other library equipment.

## Project Plan

**Detail the Vendor’s anticipated project plan. Include design, manufacture, delivery, installation, testing, and training.**

Bibliotheca will take a consultative approach to working on this project and listen to your needs. We are accustomed to working across City departments and keeping all stakeholders informed throughout the implementation process.

We understand the unique challenges the Addison Public Library faces. Bibliotheca provides personalized analysis of customer workflows and comprehensive solutions that scale as libraries grow and look to technology to effectively perform at peak levels of output and safety. We understand that gaining efficiencies and implementing a solution that makes the library a safe place to access crucial resources is of utmost importance.

After the project is awarded and a contract agreement is signed, a meeting is scheduled with your sales and project implementation teams. The purpose of the meeting is for your Bibliotheca project manager to learn more about your current environment, business model, workflow and the goals you want to achieve as well as offer consultation and guidance tailored to your project.

At this initial meeting, we will:

- Confirm products, quantities and services
- Discuss the high-level goals that need to be achieved to make your project a success and define the project acceptance criteria
- Discuss the escalation and change management process, status reporting and meeting frequency

Task 1	Initial Meeting
	<p>After the project is awarded and a contract agreement is signed, a meeting is scheduled with the library and your Bibliotheca sales and project implementation teams. The purpose of the meeting is for your Bibliotheca project manager to learn more about your current environment, business model, workflow and the goals you want to achieve in this project as well as offer consultation and guidance tailored to your project. At this initial meeting, we will:</p> <ul style="list-style-type: none"> <li>▪ Confirm AMH system design, quantities and services</li> <li>▪ Discuss the high-level goals that need to be achieved to make your project a success and define the project acceptance criteria</li> <li>▪ Discuss the escalation and change management process, status reporting and meeting frequency</li> </ul>
<p><b>Output 1</b></p>	<p>System design discussed and goals agreed upon. Escalation and change management process are established. Introduction to project implementation process and team.</p>
Task 2	Project Kick-off
	<p>After the initial meeting, your project is ready to move into the next phase: project kick-off! Project kick-off with project manager and Library:</p> <ul style="list-style-type: none"> <li>▪ Your Bibliotheca project manager will schedule a project kick-off meeting and establish a regular communication cadence.</li> </ul>

	<ul style="list-style-type: none"> <li>The Library will provide a designated point of contact and back-up contact for Bibliotheca to work with throughout the duration of the project. We commit to open communication between the Library and the Bibliotheca team.</li> </ul>
<b>Output 2</b>	System design confirmed and communication channels established. Library completes AMH Pre-Installation Questionnaire and Checklist Form.
<b>Task 3</b>	<b>Project Plan</b>
	The Library and Bibliotheca will discuss the Project Plan, the project timeline and will schedule the site survey. There may be multiple meetings to define the Project Plan, depending on the size and complexity of the project. Priorities, branch hours, contacts, customer responsibilities, Bibliotheca responsibilities and site preparation are all included in the Project Plan.
<b>Output 3</b>	Project Plan and Deliverables Schedule are confirmed. All parties review and approve the Project Plan and Deliverables Schedule.
<b>Task 4</b>	<b>Delivery of Equipment and Software Installation</b>
	We'll arrange delivery of equipment and will schedule the complete installation with minimal disruption to your library. All installation activities will be scheduled and coordinated with your approval.
<b>Output 4</b>	Equipment is delivered, uncrated and packaging is removed. Equipment is moved into place and configured. Software is configured to meet the Library's goals.
<b>Task 5</b>	<b>Equipment and Software Training</b>
	Initial AMH training is included with the installation of the AMH system. Training takes place immediately after implementation and is customized to fit the unique needs of your project.
<b>Output 5</b>	Training on product detail and product configuration decisions are delivered on the library's own equipment.
<b>Task 6</b>	<b>Verification testing</b>
	Software and hardware will be tested and approved by our installation team. The installation team checks system connectivity, software configuration and tests products with your ILS. In order to ensure all goals have been successfully achieved, it is important that you also perform testing.
<b>Output 6</b>	System configurations are updated as needed.
<b>Task 7</b>	<b>Pre-closure meeting</b>
	As the project nears completion, your Bibliotheca project manager will schedule a pre-closure meeting to ensure that all goals have been completed to the satisfaction of the Library.

<b>Output 7</b>	List of outstanding issues will be addressed.
<b>Task 8</b>	<b>Project closure</b>
	After all project implementation activities have been successfully achieved, we will send the project closure document to you, which is then signed and returned to Bibliotheca. Additionally, after the completion of the project you'll receive a survey to assess your satisfaction with this project. We encourage you to provide your feedback to help us improve our process.
<b>Output 8</b>	Project Closure document is signed by the Library signaling acceptance of the system. The system is now ready to go live for patrons.

When your project is complete, Bibliotheca will still be here to serve and support you throughout the life of your equipment.

Your success is paramount to us! We provide an efficient and smooth project implementation process that is designed to ensure your project goals are met.

### Installation Responsibilities

Activities	Bibliotheca	Library
<b>General</b>		
Project kick-off meeting	✓	✓
Day-to-day operational responsibility and accountability	✓	
Establish communication channels and agree on reporting procedures, including reporting frequency	✓	✓
Produce and update project plan to include all steps	✓	
Review and agree on installation plan, including change control	✓	✓
Exception planning/risk identification and assessment	✓	✓
Provide documentation (patron guides and manuals)	✓	
<b>Solution Set-Up</b>		
Arrange installation of power and network access points for solutions and conduits as defined by the site survey (if site survey purchased)		✓
Construction/electrical considerations, hole drilling, wall cut outs, etc.		✓
Procurement of SIP2 licenses		✓

Gather information to establish software configurations, kiosk configuration, confirming RFID tag data model	✓	✓
Provide IT staff with appropriate credentials to assist in the installation and testing of the equipment		✓
Confirm sign-off for installation of implemented solutions	✓	✓
Supervise configuration of software solutions	✓	
<b>Delivery and Installation</b>		
Arrange delivery of equipment	✓	
Resource coordination/mobilization	✓	

### Timeline

Bibliotheca can have APL's new flex AMH installed in June 2025, depending upon timing of receipt of order. This timeline will be adjusted to fit your specific project goals.

Phase	Timeline
Project Kick-off	1 week after contract executed
Delivery of Equipment	Depending upon products selected and customer schedule.
Capturing configuration information	Ongoing
Equipment and software Installation	Upon equipment delivery. Installed according to a mutually agreed upon schedule.
Hardware and Software Training (if purchased)	Upon completion of installation
Acceptance Testing	Upon completion of installation
Pre-closure meeting	Upon completion of installation and training
Project Closure	Upon completion of all project implementation activities

## Training

**Please describe Library staff training offered by the Vendor. Please include whether the training is virtual or on-site. Describe all documentation and how it is accessible to Library staff.**

Initial training is included with the installation of the AMH system. Training takes place immediately after implementation, is on-site, and is customized to fit the unique needs of your project. All training takes place on your equipment, which will be configured to the library's specific needs.

Typical content delivered during the training program:

- Staff induction workflow
- Induction sensors and best practices
- Exit sensors and ability to track materials in the system
- Emergency stops
- Reset button process
- Error acknowledgement process
- Power control practices
- Bin sensors
- Cleaning procedures
- Software interface
- Backdating process
- Printer receipt

Documentation is provided free of charge in electronic and print formats for all products and for each release of software and/or hardware. Extensive how-to videos, tips, manuals and user guides are all available in one easy-to-access place – Bibliotheca's libraryConnect.com portal. All manuals feature clear, instructional images and step-by-step guidelines.

Our training courses are inclusive of all training levels, though we do offer additional self-guided training via our [www.libraryconnect.com](http://www.libraryconnect.com) selfHelp portal.

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open+ ▾

[Self-service](#) ▾  
uniFi+

[Return and Sorting](#) ▾  
Staff Tools ▾

[Security Detection Systems](#) ▾  
Central Management ▾

[Library Supplies](#) ▾

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Return and Sorting

## Return and Sorting

Use the links below to access all the content you need for our flex AMH products and solutions.

## Pricing

Please provide detailed pricing for the removal of current AMH and the design, manufacture, delivery, and installation of the proposed solution. This should include shipping charges, training fees, and any other nonrecurring costs.

Pricing plans should include purchase and leasing options for the required hardware. Pricing plans should include maintenance options.

Guarantees and warranties should be stated in writing and submitted as part of the proposal. The Vendor shall warrant that the system will meet the reliability and performance requirements set forth in the proposal and will continue to do so if the system remains under vendor maintenance.

We have provided the best value solutions for Addison Public Library. Please contact us with any questions.

Layout 1: flex AMH 9-bin with bulkSeparator	Price
<p>Includes:</p> <ul style="list-style-type: none"> <li>(2) two patron inductions               <ul style="list-style-type: none"> <li>▪ Interior flex bookDrop 510, manual lock, non-RFID, flat front</li> <li>▪ Exterior flex bookDrop 510, no lock, non-RFID, drive-up front</li> </ul> </li> <li>(1) one staff station</li> <li>(1) one holds printer</li> <li>(2) two bulkSeparator modules</li> <li>(9) nine bins</li> </ul> <p>Conveyance</p> <p>Drawing: Addison_9-Bin_Bulk_HF_RevL1-K1</p>	
System price	\$189,663.43
Annual Software License	Included
Installation	Included
Training Services (on-site, upon installation)	Included
Warranty (Year 1)	Included
Shipping	\$22,352.94
<b>Total</b>	<b>\$212,016.37</b>

### Layout 1: Support and Maintenance

To fully ensure that the City of Irving continues to focus on its priority initiatives, we provide **full-service support and maintenance**, which includes:

- Remote software support to ensure that issues can be resolved quickly
- Field technician to go on site
- Repair and parts replacement
- Bug fixes / patches

Year 1	Year 2	Year 3	Year 4	Year 5
Warranty	\$7,899.00	\$8,135.97	\$8,380.05	\$8,631.45

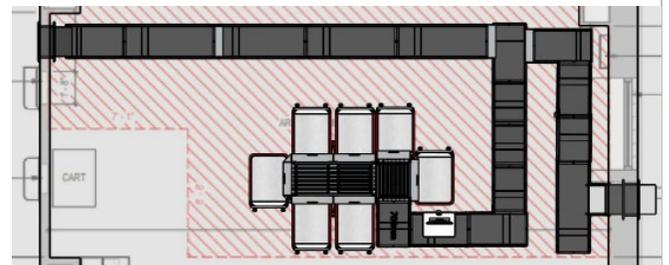
### Layout 2: flex AMH 7-bin with bulkSeparator

Price

Includes:

- (2) two patron inductions
  - Interior flex bookDrop 510, manual lock, non-RFID, flat front
  - Exterior flex bookDrop 510, no lock, non-RFID, drive-up front

- (1) one staff station
- (1) one holds printer
- (2) two bulkSeparator modules
- (7) seven bins
- Conveyance



Drawing: Addison\_7-Bin\_Bulk\_HF\_RevN1

System Price	\$173,559.43
Annual Software License	Included
Installation	Included
Training Services (on-site, upon installation)	Included
Warranty (Year 1)	Included
Shipping	\$20,000.00
<b>Total</b>	<b>\$193,559.81</b>

### Layout 2: Support and Maintenance

To fully ensure that the City of Irving continues to focus on its priority initiatives, we provide **full-service support and maintenance**, which includes:

- Remote software support to ensure that issues can be resolved quickly
- Field technician to go on site
- Repair and parts replacement
- Bug fixes / patches

Year 1	Year 2	Year 3	Year 4	Year 5
Warranty	\$7,899.00	\$8,135.97	\$8,380.05	\$8,631.45

Our comprehensive support plan includes local on-site technicians who come prepared. Bibliotheca's technician for Addison Public Library is located nearby and has provided service for several years. We do not fly out a person from the home office, and we do not charge for travel, hotels and meals.

We would also like to offer a 2% discount if you pay upfront for 2 years after warranty. If you purchase 3 years after warranty upfront, we can offer a 5% discount.

Removal of the current system: \$3,842.45

**AMH Pricing Terms:**

- Support and maintenance pricing is subject to change based on final quantities and product configuration.
- flex AMH™ payment terms: 50% invoiced on order placement; 40% invoiced upon shipment; 10% invoiced at delivery, NET 30.
- System returns for AMH systems are not available as this is a custom solution.
- Due to delays with global supply chains and shipping, delivery lead times are subject to change.

## Lease Pricing

Leasing is a budget-friendly solution that allows libraries to save cash and preserve their capital budget. Normalize your budget and eliminate surprises with the same, regular payment throughout the term of the payment plan. Support and maintenance, parts and shipping, and Bibliotheca software upgrades are included.

Layout 1: flex AMH 9-bin with bulkSeparator	Quantity
<b>flexAMH</b> (2) two patron inductions <ul style="list-style-type: none"> <li>▪ Interior flex bookDrop 510, manual lock, non-RFID, flat front</li> <li>▪ Exterior flex bookDrop 510, no lock, non-RFID, drive-up front</li> </ul> (1) one staff station (1) one holds printer (2) two bulkSeparator modules (9) nine bins Conveyance	1
<b>AMH Training</b>	Included
<b>Installation Services</b>	Included
<b>Customer Support</b>	Included
<b>Support and Maintenance for all solutions</b>	Included
<b>Shipping and Administration</b>	Included

**Proposed lease pricing:** This table lists the price for a finance plan by year.

Year	Description	Annual Fee
1	Solutions Listed Above	\$56,648.29
2	Solutions Listed Above	\$56,648.29
3	Solutions Listed Above	\$56,648.29
4	Solutions Listed Above	\$56,648.29
5	Solutions Listed Above	\$56,648.29
<b>TOTAL</b>		<b>\$283,241.45</b>

Layout 2: flex AMH 7-bin with bulkSeparator	Quantity
<b>flexAMH</b> (2) two patron inductions <ul style="list-style-type: none"> <li>▪ Interior flex bookDrop 510, manual lock, non-RFID, flat front</li> <li>▪ Exterior flex bookDrop 510, no lock, non-RFID, drive-up front</li> </ul> (1) one staff station (1) one holds printer (2) two bulkSeparator modules (7) seven bins Conveyance	1
<b>AMH Training</b>	Included
<b>Installation Services</b>	Included
<b>Customer Support</b>	Included
<b>Support and Maintenance for all solutions</b>	Included
<b>Shipping and Administration</b>	Included

**Proposed lease pricing:** This table lists the price for a finance plan by year.

Year	Description	Annual Fee
1	Solutions Listed Above	\$52,715.00
2	Solutions Listed Above	\$52,715.00
3	Solutions Listed Above	\$52,715.00
4	Solutions Listed Above	\$52,715.00
5	Solutions Listed Above	\$52,715.00
<b>TOTAL</b>		<b>\$263,575.00</b>

**Note:**

Above pricing is estimated based on today's interest rate. When your library is ready to move forward, a formal contract and final pricing based on the rate at that time will be supplied by De Lage Landen Financial (DLL). The financial approval process will be done through DLL, a Bibliotheca partner.

Lease pricing is estimated and will be confirmed once final configurations and quantities are decided. The library has the option to provide a down payment to lower annual term payments.

At the end of the 5-year finance agreement, your library can begin a new 5-year finance agreement and replace the equipment with Bibliotheca solutions available at that time. Another option is to move to a standard annual service agreement with Bibliotheca.

## Comparison: Lease, Traditional Purchase and Prepaid Support

Compare the purchasing options and find the best option for Addison Public Library’s budget. Here are some of the drivers for choosing a purchasing vehicle. Bibliotheca offers more flexibility, and we appreciate the opportunity to discuss these opportunities with the evaluation team.

Budget Normalization	Traditional Purchase	Capital Surplus
Lowest Upfront Investment	Procurement Friendly	Lowest Overall Cost
Budget Normalization	BuyBoard Compatible	Operational Cost Reduction
Obsolescence Protection	Moderate Upfront Investment	Highest Upfront Investment

## Financial Information

### Demonstration of the financial strength and stability of the Vendor.

Bibliotheca is a large, stable company that has served the library community for more than 55 years. Our global support for libraries and history of innovation confirms our long-term commitment to libraries.

- We have partnered with 30,000 unique libraries, in more than 70 countries, helping them evolve their services and connect with their communities.
- Operating performance is one of the strongest in the industry.
- Financial results are audited annually, and we continue to receive clean audit opinions.
- Solid credit report, no liens or judgments, and a low financial stress score.

### State if the Vendor is presently negotiating a sale, acquisition, or merger that would alter the Vendor’s existing structure.

Bibliotheca is not negotiating a sale, acquisition, or merger.

### Any other information that demonstrates the Vendor’s experience, ability, and capacity to produce the required outcomes in the RFP.

Analyzing library trends and listening to our customers allows us to continue providing relevant solutions. Regular account meetings give customers a platform to feed ideas into our enhancement process. We compile valuable feedback at annual forums and user group sessions, where customers share ideas and library experiences and preview new software releases.

Bibliotheca invests heavily in research and design. We’ve increased the rate of software releases that include regular feature upgrades as well as new features. These releases are available to all customers with solutions on a service agreement.

Bibliotheca employs many team members with a Masters in Library Sciences who have worked in libraries. This esteemed group of employees have practical experience that informs how we build our products.

Bibliotheca has 55+ years of experience providing products and services to libraries. In 1992, Bibliotheca (formerly 3M Library Systems) began marketing self-checkout systems to libraries, and

we quickly recognized that it could be difficult for these types of devices to communicate with integrated library systems (ILS) due to unique communication protocols. We knew that a lack of compatibility could hurt libraries, so we developed SIP to facilitate communication between devices and your ILS. Rather than make this a proprietary standard, we made it available for free to all vendors and then did the same with SIP2. Later, we allowed NISO to use SIP2 as the basis for the NCIP standard.

Since the launch of our first SelfCheck™ system, we have worked with all major ILS vendors to ensure the continued compatibility of our products with their systems.

We began full commercialization of RFID products for libraries in 1999. Since then, we have installed RFID systems at thousands of libraries around the world, including many libraries in your area. Our efforts in research, design and human factors engineering have been awarded several patents for this pioneering work.

Our extensive experience with RFID has enabled us to continuously improve our offerings for libraries and as a result we have some of the best performing, and most reliable systems on the market.

We led the push to provide recommended reads right at the selfCheck and partnered with NoveList to provide the first recommendation software onboard a selfCheck using proprietary algorithms to capture a patron's "likes" instead of just suggesting books by the same author. Bibliotheca and NoveList®, a division of EBSCO Information Services (EBSCO), are proud to announce a new exclusive agreement that makes the expertly curated recommendations from NoveList available at checkout only on Bibliotheca's self-service solutions.

## Parts Availability

To ensure ready availability of components, parts, and supplies, all major elements of the system must be warehoused in the U.S.A., or the Vendor must demonstrate the ability to have parts available within 24 hours of request.

Bibliothecca's warehouse for parts is conveniently located in Louisville, Kentucky, USA, which allows us to offer one-day shipping to anywhere in the continental USA.



## Maintenance and Support

**APL prefers that Vendor support be available during most Library open hours with a response time of four hours or less for critical hardware and software issues. APL prefers to contact Vendors via telephone or web/email-based ticketing system for support requests.**

Understood. As APL is a current valued Bibliotheca customer, you will continue to receive the same quality, responsive remote support that you have become accustomed to. Library staff can continue to contact Bibliotheca via telephone or web/email-based ticketing system.

**Please describe ongoing maintenance and support offered by the Vendor, including availability of telephone or web/email-based support and support response times. Describe any preventative maintenance plans for the proposed solution that the Vendor recommends including recommended APL staff cleaning and maintenance tasks.**

Bibliotheca has the most comprehensive support team serving libraries. Our unsurpassed talent and scale mean that we can accomplish more together.

- Largest network of on-site support technicians – 80+ strong
- Broad geographic coverage ensures you have a local expert on-site when needed
- Deep bench of remote support technicians and product experts – 40+ strong
- Many in-house product experts and on-site technicians have been working with Bibliotheca solutions for 10+ years

**Skilled.** Our techs know libraries, and they know your equipment. Bibliotheca on-site and remote support technicians are required to complete weeks of training for each product before being certified to work on it. In addition, techs are required to take customer satisfaction service excellence and safety training prior to completing onsite services. We do not send general computer repair people (aka “smarthands”) to service our products.

**Local.** We have local on-site technicians who come prepared. Bibliotheca’s technicians for the Addison Public Library are located in Dallas. We do not fly out a person from the home office, and we do not charge for travel, hotels and meals.

Bibliotheca’s warehouse for parts is conveniently located in Louisville, Kentucky, USA, which allows us to offer one day shipping to anywhere in the continental USA.

**Transparent.** Proactive support starts with the Customer Center support portal where we keep you in the loop on all requests.

Bibliotheca's comprehensive service plan	
<p><b>24/7 self-guided learning.</b>  <a href="http://www.libraryconnect.com">www.libraryconnect.com</a> helps you keep your library running smoothly.</p> <ul style="list-style-type: none"> <li>▪ Tips and training materials</li> <li>▪ How-to videos</li> <li>▪ Manuals and user guides</li> </ul>	<p><b>24/7 help desk support.</b>            Connect with a support technician when you need it most. We have extended hours and improved response time.</p>
<p><b>Customer Center support portal.</b> <a href="http://www.bibliotheca.com/helpdesk">www.bibliotheca.com/helpdesk</a> is your dashboard for support.</p> <ul style="list-style-type: none"> <li>▪ Improved case management</li> <li>▪ Easily open, edit and close support cases</li> <li>▪ View current system status and historical cases</li> <li>▪ Share information between your library and Bibliotheca</li> </ul>	
<p><b>Responsive on-site help.</b> So you can get back to more important things.</p> <ul style="list-style-type: none"> <li>▪ If an issue requires on-site assistance, our technicians are dispatched to service your equipment</li> <li>▪ Parts are included, and technicians arrive in vehicles stocked with parts</li> <li>▪ Time to first response: 4 business hours</li> <li>▪ Time for on-site response: 8 business hours contingent on geography-specific call-out schedule</li> <li>▪ On-site support hours are Monday – Friday during standard business hours, less holidays</li> </ul>	

### Cleaning and maintenance for library staff

The flex AMH sorter was designed with simplicity in mind. Staff maintenance consists of keeping the unit and optical sensors clean. The unit should always be kept clean and tidy. It is essential that the area around the unit is kept clear of obstructions.

The power should always be isolated during cleaning so that moving parts are disabled. This can be done by using the emergency stop.

Extra care should be taken when cleaning electronic components, moving parts (such as motors and magnets) and around power supply and network cables. Also, ensure that dust is not blown into electronics or moving parts during cleaning.

All belts should be cleaned regularly using a slightly damp micro-fiber cloth. Dust that builds between the rollers and the sorters should be removed using either a fine brush or a compressed air bottle.

Receipt paper will need to be replaced intermittently.

There is no other maintenance to complete – leave the rest to Bibliotheca's remote support and on-site technicians.

## Warranty and Service Requirements

APL expects to call one toll-free telephone number to obtain all support including software and hardware service for all elements of the system and all transaction assistance with the payment systems.

- **Does the Vendor directly provide all hardware and software support for all items proposed? If not, who provides the service?**

Bibliotheca's authorized nationwide on-site service is provided through exclusive agreement with DecisionOne. Our partners for 20 years, Bibliotheca trains technicians and dispatches them to your library.

- **How many full-time support technicians are available in the Midwest (US)?**

Bibliotheca has 11 manufacturer-trained on-site technical located in the Midwest. This broad geographic coverage ensures you have a local expert on-site when needed.

**The Vendor must provide an all-inclusive 12-month extended warranty on equipment, software, and components. A maintenance / service contract must be offered and are subject to negotiation by the Library.**

Yes.

**The Vendor must offer a 12-month 100% money-back performance guarantee on all equipment purchased and covered by a 12-month extended warranty or service agreement.**

The custom flex AMH solution we propose for APL cannot be returned as it is a customer system build specifically to fit the space. The Bibliotheca cannot provide a money-back performance guarantee, however, we will work with APL to ensure that all project goals are met.

**Software patches and service pack releases must be supplied at no additional charge to the Library while under maintenance.**

Yes.

**Feature updates and new software versions must be included at no additional charge while under maintenance.**

Yes.

**Service technicians must be fully trained, factory authorized, and certified by the manufacturer to perform service on the machine.**

Yes.

- Largest network of on-site support technicians – 80+ strong
- Deep bench of remote support technicians and product experts – 40+ strong
- Many in-house product experts and on-site technicians have been working with Bibliotheca solutions for 10+ years

## References

Vendors shall submit a list of at least three references for whom they have done work similar to that described in the scope of this RFP. Information provided for each client must include the following:

- Client's name
- Brief explanation of what the contract covered
- Size of the library
- Contact person
- Title
- Address
- Phone number
- E-mail address

Failure to provide the above information may result in the Vendor being disqualified and its proposal not considered. APL reserves the right to contact all references to obtain, without limitation, information regardless of the Vendor's performance on the listed jobs.

### Algonquin Area Public Library District

Algonquin replaced its 3M AMH with a new flex AMH.  
35,000 sq ft serving 40,000 residents. Circulation 900,000 items annually.  
Belinda Husak, Assistant Director  
2600 Harnish Drive, Algonquin, IL 60102  
847-458-6060  
bhusak@aapld.org

### Aurora Public Library District

After building the Santori branch, after a few years the library realized they needed large sortation system to handle the intake. The resulting flex AMH has a bulk induction as well as a walk-up patron return.  
97,000 sq ft serving around 200,000 residents. Circulation 1,600,000 items annually.  
Heather Sturm, Director of Neighborhood Services  
Yiota Piraino, Senior Manager of Circulation  
101 S. River St., Aurora, IL 60506  
630-264-4117  
hsturm@aurorapubliclibrary.org  
yiota@aurorapubliclibrary.org

### Wilmette Public Library

Wilmette needed a sortation system to keep up with intake and speed up the return process.  
70,000 sq ft serving around 65,000 residents. Circulation 735,000 items annually.  
Patricia DeVuono, Shelving Manager at Wilmette Public  
Wilmette Ave., Wilmette, IL 60091  
847-256-5025  
pdevuono@wilmettelibrary.info

## Anything not covered

**Please use this area to describe any services and/or products not already mentioned in the proposal that may be of interest to APL.**

Bibliotheca provides a turnkey system for APL:

- Bibliotheca's recommended solutions are the newest generation, and they are easier to maintain, so you'll enjoy reliable performance from the start.
- We do not charge extra for installation and project management – we are here to support you throughout the project and after.
- Included in our comprehensive support and maintenance plan are factory-trained on-site technicians. We are the only vendor to provide this level of service.
- More experience with leasing and can offer attractive pricing, if you choose this option.
- Actively working toward a sustainable future and not just compliance to government-prescribed guidelines. We have worked with global leaders in industrial design, electro-mechanical engineering and materials science to build our platform for sustainable, recyclable and carbon-neutral products.
- Focus on the long-term: Your investment in Bibliotheca solutions means your products will have an extended lifespan and will integrate with our ecosystem of solutions now and in the future.

## Vendor requirements

The selected Vendor will have a proven track record of working collaboratively with public libraries, an ability to provide a high level of customer service, project management skills, and considerable expertise in RFID technologies. Vendor must pay its employees the applicable prevailing wage rate for DuPage County Illinois, in accord with the requirements of the ILLINOIS PREVAILING WAGE ACT, 820 ILCS 130; and also be compliant with:

- The PUBLIC WORKS EMPLOYMENT DISCRIMINATION ACT, 775 ILCS 10/0.01; and
- The ILLINOIS HUMAN RIGHTS ACT, 775 ILCS 5/1-101; and
- The EMPLOYMENT OF ILLINOIS WORKERS ON PUBLIC WORKS ACT, 30 ILCS 570; and
- ARTICLE 33E. PUBLIC CONTRACTS, 720 ILCS 5/33E-1, 5/33E-3, 5/33E-4, 5/33E-7, 5/33E-8 – Interference with Public Contracting – Proposal Rigging and Rotating Kickbacks-Bribery; and
- DIVISION 42.1 PUBLIC CONTRACTS 65 ILCS 5/11-42.1-1 Delinquent Taxpayers

Understood. Bibliotheca has served APL for 15 years and we comply with applicable state laws.



**AUTOMATED MATERIALS HANDLING (AMH) SYSTEM AND RELATED  
INSTALLATION, TRAINING, AND SUPPORT SERVICES  
FOR  
ADDISON PUBLIC LIBRARY**

**Prepared For:**  
Brooke Sievers  
Assistant Director  
Addison Public Library

**Prepared By:**  
Peton Nielsen  
Regional Sales Manager  
678-218-6652 ext 7  
[peton.nielsen@envisionware.com](mailto:peton.nielsen@envisionware.com)

**October 15, 2024**  
**Request for Proposal**

**ENVISIONWARE®**  
Enriching Public Library Service Inside and Out

October 15, 2024

Ms. Brooke Sievers  
Assistant Director  
Addison Public Library  
4 Friendship Plaza  
Addison, IL 60101

Dear Ms. Sievers:

Thank you for inviting us to participate in your request for proposal for your Automated Materials Handling System project. Together with Lyngsoe Systems, we have designed an industry-leading system that delivers the latest in technologies and options for seamless integration as desired by the library.

EnvisionWare has been delivering self-service solutions to public libraries for twenty-five years and comprehensive RFID-enabled circulation solutions since 2006. In 2017, EnvisionWare and Lyngsoe entered into a new partnership in which EnvisionWare would represent Lyngsoe systems in North America. This combined the best AMH engineering and manufacturing firm with the public library industry's best RFID and customer service organization. The result is an unparalleled partnership capable of delivering the quietest, fastest, and most serviceable AMH solutions supported by the most competent and dedicated support organizations.

The partnership of EnvisionWare and Lyngsoe Systems is the most qualified organization to design, manufacture, install, test, maintain, and support the automated materials handling system proposed in this response. Lyngsoe Systems has hundreds of library sorting systems in the US, many with multiple installations, including some of North America's largest and most demanding library systems. In fact, large library systems are using Lyngsoe sorters to sort up to 12,000 items per hour.

***Key points of our proposal:***

- > The proposed sorter is quiet, making deployment in a staff or even public area acceptable. Where some sorters cause staff to become startled or distracted when the sorter operates, this system will not interfere with normal staff duties.
- > The solution is precision-engineered and delivers optimal reliability and performance at near flawless accuracy rates.
- > Gentle handling- some legacy designs may use sweep technology which may be prone to damaging periodicals or paperback volumes. The proposed solution uses a means of transport that has been specifically designed to manage all types of library materials, even periodicals, without damage.
- > The sorter is environmentally friendly -- modules only use power when moving an item. This system consumes the lowest power of any sorter available.
- > The system delivers all of the following features:
  - Barcode and RFID-enabled check-in and multi-bin sorting capacity



- Real-time integration with the Library's Symphony ILS.
- Comprehensive reporting capabilities.
- Significant productivity gains through reduction in key labor-intensive workflow processes, enhanced customer service, and reduced incidents of staff repetitive motion injuries.
- A system that is optimized for use in the library environment in the space allocated to it, with the ability to be easily and quickly expanded.
- Allows staff to access AMH software remotely to troubleshoot if necessary

The Lyngsoe and EnvisionWare teams have closely read and understand the desired functionality for the Automated Material Handling System for the Addison Public Library. This proposal meets and exceeds the critical requirements as identified by APL.

I am committed to delivering the very best solution to fit the library's needs. You are welcome to contact me at any time at 678-218-6652 ext 7 or [peton.nielsen@envisionware.com](mailto:peton.nielsen@envisionware.com)

From all of us at EnvisionWare, thank you for considering our proposal for Addison Public Library.

Warm regards,

*Peton Nielsen*

Peton Nielsen  
Regional Sales Manager  
EnvisionWare, Inc.

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## EXECUTIVE SUMMARY FOR ADDISON PUBLIC LIBRARY

**Describe the system being proposed and any unique attributes that make your company different or unique.**

In 2017, EnvisionWare and Lyngsoe entered into a new partnership in which EnvisionWare would represent Lyngsoe systems in North America. This combined the best AMH engineering and manufacturing firm with the public library industry's best RFID and customer service organization. The result is an unparalleled partnership capable of delivering the quietest, fastest, and most serviceable AMH solutions supported by the most competent and dedicated support organizations.

### **Proposed System**

In partnership with Lyngsoe, EnvisionWare is proposing a turnkey automated materials handling system for the Addison Public Library.

### **Staff Induction**

The Ergo Staff automates and optimizes material processing for library staff. The staff induction quickly becomes the workhorse of the library's circulation room by rapidly and efficiently checking in branch transfers, new material, and any items that need to be sorted and returned to shelf.

With the capacity of up to 2000+ items per hour; library staff will not have to perform time-consuming and repetitive check-in processes; library materials will be on the shelf quicker and back into the hands of STDL's patrons.

Library staff will interface with the staff induction via a user-friendly touch screen with a graphical interface. RFID tags or optional barcodes are read quickly and communicated with STDL's Integrated Library System, RFID security is enabled, backdating and hold slip printing can all happen automatically, and check-in statistics can be monitored remotely. The Ergo Staff work surface is height adjustable between 32" and 38", ensuring an ergonomic work environment standing or sitting.

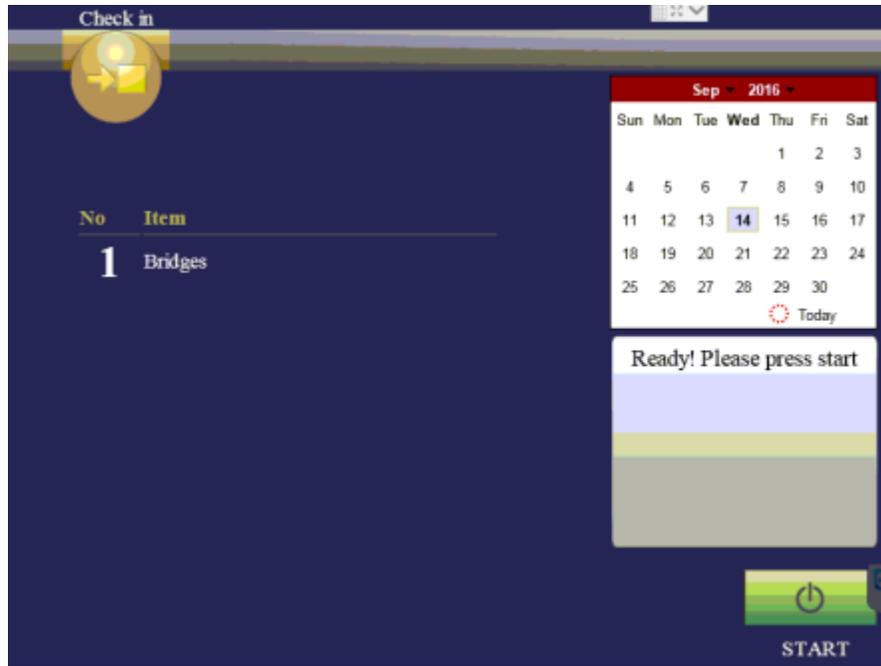


*Ergo Staff™ 1200 Staff Induction*

### **Ergo Staff FUNCTIONAL DESCRIPTION**

The machine function is as follows:

- The default language in the staff screen is English, but other languages are available and can be retrieved via the configuration menu.
- The staff member initiates use of the machine by either pressing the start button on the conveyor or the start button on the touchscreen
- The staff member places an item on the belt. Once the RFIDtag or the barcode is read, the belt will automatically induce the item onto the SortMate™ AMHsystem for sorting.



Staff Induction Screen

- The item ID is read from the barcode or RFID tag; the item is checked in with the ILS and the material protection (EM optional) is activated before the item is sent to the sorter.



Check in confirmations

- Once the machine is ready for the next item, the belt will stop, and the screen will display a “ready next item” message.
- The above procedure must be repeated until all items have been processed.
- When all items have been returned, the user finishes the procedure by pressing “Stop” on the screen.

### **BISR (Bulk Item Separator and Intelligent Return System)**

Included in the proposed system is Bulk Item Separator & Intelligent Return system (BISR) with interface to a standard style book return. The **BISR** compact singulation module is elegant in its simplicity, which results in lower maintenance and higher efficiency for the return and check in of library materials. In addition, this module effectively recirculates double reads (detection of more than one item at a time) so that staff intervention and space is greatly reduced, and accuracy is greatly increased.

Key components of the BISR:

- > Allows patrons to insert items in bulk – drop and go.
- > Compact, modular system design
- > Automates transport and sortation of all singulated returned items
- > Sortation and introduction of new and/or re-labelled items
- > Automatic “Holds” or “Exceptions” receipt printing

This module is specifically designed for multiple-item returns. Most offerings of a de-shingler eventually have the library putting a sign that says "One item at a time" because they end up sending a large percentage of library items to the exceptions bin for staff to hand separate and reprocess. Our bulk induction has a recycling feature that separates items up to 3 times should they be grouped up at the RFID identification position. If it detects multiple items, they are sent back into the hopper for reprocessing automatically – no staff intervention needed. This saves not only staff time, but also truly offers a bulk induction, not one that is just bulk induction capable (but works better one at a time). Lyngsoe offers the most complete performance for items processed the 1st time with no staff interaction needed.

### **Backdating**

To enable backdating, simply select a date from the on-screen calendar and all items will be processed utilizing the selected date.

### **Offline mode**

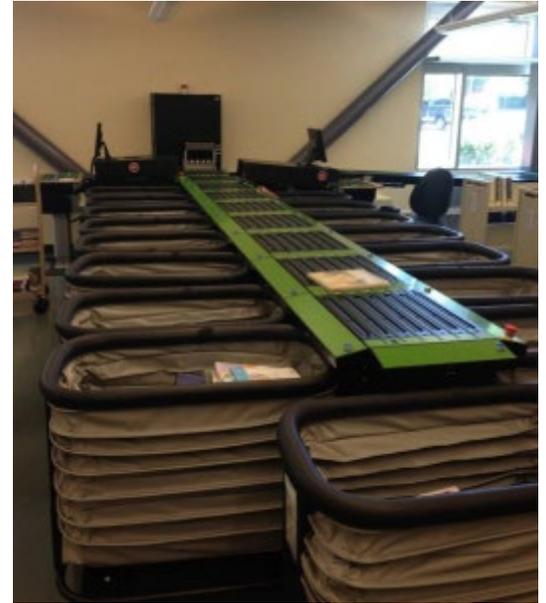
If the connection between machine and library network is down the staff induction will be out of order until the library network is reconnected.

**Description of the Sorter**

Lyngsoe’s Sort Mate is a high-speed sorting system that is the brawn behind the proposed Automated Material Handling system. This sorter has been specifically designed for libraries and is the ideal solution for sorting a vast array of library materials. Items checked in using a patron or ErgoStaff™ staff return station are electronically tracked throughout the length of the sorter and sent to the proper discharge location.

Sensors throughout the system assure that library material is accurately sent to the proper destination. Lyngsoe has optimized the system controls so that items never stop on the sorter while other items are diverting, which allows for continuous flow from the induction stations, higher throughputs, and longer life expectancy for the drive components.

The low profile and whisper-quiet operation will blend into the library’s circulation room. The sorter features transport belts for item stability and unsurpassed durability. Between the transport belts are electrically actuated pop-up rollers that divert items to sort destinations on either side.



 <p><b>Technical Specifications – Sort Mate™</b></p>	
<b>Sorting capacity:</b>	2,500 material units per hour
<b>Material dimensions:</b>	Max: 400 x 300 x 100 mm (L x W x H) 15.8 x 11.8 x 4 inches (L x W x H)  Min: 100 x 100 x 5mm (L x W x H) 2.6 x 2.6 x .1 inches (L x W x H)
<b>Weight</b>	Max weight: 5 kg Min weight:30 g
<b>Material types that can be processed in the system:</b>	Books, CD-ROMs, books with enclosures, talking books, video tapes, cassette tapes. Book-like material units containing cassette tapes / CDs.
<b>Requirements for materials:</b>	The bottom side of the item must be flat.

 <b>Technical Specifications – Sort Mate™</b>	
<b>Floor level:</b>	The floor where the sorting system is installed must not vary more than +/- 5 mm.

**Sorter Design**



*SortMate™ components*

The sorter is a linear belt sorter consisting of a straight conveying section on which each piece of library material is transported. The conveying section consists of six (6) parallel belts conveying the material to the correct discharge. The round belts on the sorter provide reliable transport of soft materials such as newspapers, magazines, books without hard cover, etc. At each sorting system discharge, pop-up transverse rollers (diverters) are mounted which lift electrically when items pass over them. When the item is lifted, the rollers roll right or left, directing the items into the book carts placed on either side of the sorting system.

**Function**

The sorting system works as follows:

- The patron inducts one item at a time into the check-in station.
- The material ID is read from either the barcode or RFID tag on the item being returned and is checked with the information in the ILS.
- If the material is accepted by the ILS, a “location” or classification for the material is returned to the sorter.

- The material is automatically conveyed into the sorting system towards the correct discharge.
- When the material reaches the correct discharge, it is automatically lifted by the transverse rollers, which then puts the item in the correct bin at one of the sorting system sides.
- The patron continues this process until all their items are returned.

## VENDOR INFORMATION FOR ADDISON PUBLIC LIBRARY

### Company Information

Vendors shall provide information that documents their firm’s experience and capacity to produce the required outcomes. A vendor is defined as the company, entity, or partnership that is submitting a proposal under this RFP, not individual companies in a partnership or joint venture.

This information shall include:

**Form of ownership.**

EnvisionWare is part of Volaris, a group within Constellation Software, a publicly traded company.

**The number of years the Vendor has been in business under its current name.**

EnvisionWare filed status as a Georgia corporation on October 29, 1998, and has a more than twenty-five year history of successfully serving public libraries.

**Corporations shall provide a Certificate of Good Standing from the Secretary of State, or equivalent documentation, showing the company is fully compliant with its filing requirements and is in good standing with the state in which it is incorporated.**



GEORGIA  
CORPORATIONS DIVISION

GEORGIA SECRETARY OF STATE  
BRAD RAFFENSPERGER

[HOME](#)

**BUSINESS SEARCH**

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**BUSINESS INFORMATION**

Business Name: <b>ENVISIONWARE, INC.</b>	Control Number: <b>K839910</b>
Business Type: <b>Domestic Profit Corporation</b>	Business Status: <b>Active/Compliance</b>
Business Purpose: <b>NONE</b>	
Principal Office Address: <b>3820 Mansell Rd, Suite 350, Alpharetta, GA, 30022, USA</b>	Date of Formation / Registration Date: <b>10/29/1998</b>
State of Formation: <b>Georgia</b>	Last Annual Registration Year: <b>2024</b>

---

**REGISTERED AGENT INFORMATION**

Registered Agent Name: <b>C T Corporation System</b>
Physical Address: <b>289 S. Culver Street, Lawrenceville, GA, 30046, USA</b>
County: <b>Gwinnett</b>

---

**OFFICER INFORMATION**

Name	Title	Business Address
Brian Beattie	Secretary	3820 Mansell Rd, Suite 350, ALPHARETTA, GA, 30022, USA
Mark Miller	CEO	3820 Mansell Rd, Ste 350, Alpharetta, GA, 30022, USA
Seann Maheson	CFO	3820 Mansell Rd, Ste 350, Alpharetta, GA, 30022, USA

Office of the Georgia Secretary of State Attn: 2 MLK, Jr. Dr., Suite 313, Floyd West Tower Atlanta, GA 30334-1530, Phone: (404) 656-2817 Toll-free: (844) 753-7825, WEBSITE: <https://sos.ga.gov/>  
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**Describe the length and nature of the Vendor’s experience in providing the products and services requested in this RFP.**

With local headquarters and global reach, EnvisionWare and Lyngsoe Systems have created a partnership to provide public libraries with cutting-edge logistics, self-service, and library-efficiency solutions. Serving over 12,000 libraries since 1998, EnvisionWare is the largest provider of self-service applications for public libraries. In 2007, EnvisionWare implemented the largest RFID and AMH project in North America at the Las Vegas-Clark County Library District. 2018 has started the next phase for Las Vegas-Clark County and with the Lyngsoe Partnership, we will be dramatically improving the reliability, usability, and speed of their systems with a system-wide AMH upgrade. Sharing a common dedication to strong customer service and long-lasting customer relations, EnvisionWare and Lyngsoe made their partnership official in 2017.

Lyngsoe Systems is the global leader in designing and producing AMH solutions for libraries of all sizes. Specializing in custom tailored configurations based on the unique processes of each individual library, customer needs are at the core of every AMH installation. From single branch locations to large library systems requiring high-volume central sorters, each AMH system is designed with a deep understanding of current and future library processes.

EnvisionWare has been innovating and creating solutions for library self-service and efficiency for twenty years. From the beginning, the company committed to developing one new solution each year while maintaining, upgrading or rewriting existing applications. This commitment was designed so customers could grow with EnvisionWare over time.

Lyngsoe Systems is a Maryland-based corporation that operates as a subsidiary of Lyngsoe Systems A/S. The corporate headquarters of Lyngsoe Systems (est. 1952) are in Denmark. The HQ facility is comprised of research & development, RFID test center, sales, hosting center, project and service facilities. As one of the world’s leading library automation providers, Lyngsoe is home to world class software developers and systems integrators of logistics solutions for a wide range of complex automated materials handling (AMH) environments. With more than 2,700 installations in over 60 countries, the Lyngsoe team has demonstrated extensive experience in customer process knowledge, solution design, software development, integration, service and maintenance. Along with complete project management and consultancy services in regional and global implementations. Lyngsoe Systems has implemented tailor-made solutions for airports/airlines, manufacturing/supply chain and postal/logistics organizations. Each of these industries share a common denominator of facing extensive logistical challenges – and every company that Lyngsoe Systems has worked with was provided with a complete turnkey solution. These experiences have provided the organization with insight on how to approach each unique logistical challenge across different industries, which has been carried over and implemented in libraries. The first Lyngsoe library system was installed in 1995 in the Aarhus (Denmark) library, since then, they have installed over 350 systems worldwide (over 300 in North America).

Similar to EnvisionWare’s commitment to grow with their customers, Lyngsoe has developed a relationship-based consultation process that aids in the creation of new products and systems that stay ahead of the ever-changing library environment. The two companies share an understanding of delivering the best solutions to all types of libraries – regardless of size. This common goal has led to the

development of evolving solutions in self-service, AMH, and Intelligent Material Management (IMMS). With a focus on innovation, the Companies are not only creating the best ergonomic solutions for today; we are creating systems that will constantly evolve and adapt with libraries around the globe.

**Key points of EnvisionWare's proposal:**

- > The proposed system is quiet, making deployment in staff or even public areas acceptable.
- > A critical measure of a new sorter implementation is accuracy. The solution is precision-engineered and delivers optimal reliability and performance at near flawless accuracy rates.
- > The sorter is environmentally friendly -- modules only use power when moving an item. This system consumes the lowest power of any sorter available.
- > The system delivers all of the following features:
  - RFID-enabled check-in and multi-bin sorting capacity.
  - Real-time integration with the Library's ILS.
  - A customer-friendly user interface.
  - Comprehensive reporting capabilities.
  - Significant productivity gains through reduction in key labor-intensive workflow processes, enhanced customer service, and reduced incidents of staff repetitive motion injuries.
  - A system that is optimized for use in the library environment in the space allocated to it, with the ability to be easily and quickly expanded.
  - Allows staff to access AMH software remotely to troubleshoot if necessary

The Lyngsoe and Envisionware teams have closely read and understand the desired functionality for the Automated Material Handling System for the Addison Public Library. This proposal meets and exceeds the critical requirements as identified by the library.

**Names of all partners or investors and how long each has been in existence.**

EnvisionWare is part of Volaris, a group within Constellation Software, a publicly traded company.

## RESPONSE TO SPECIFICATIONS FOR ADDISON PUBLIC LIBRARY

### General and Technical Requirements

Please indicate whether the proposed solution includes the following features/functionality:

**Interoperability with SirsiDynix Symphony via SIP2 or API connectivity.**

Compliant. The system will communicate with the ILS via a SIP2 connection.

**Ability to print hold and transit slips at the staff induction without the item needing to be sorted into a bin.**

Compliant.

**Ability to add length for additional bins in the future.**

Compliant. The AMH system is completely modular, and system components can be added at any time. Additional patron returns, staff inductions, and additional sort points can be added so long as space allows. A new sorter module can be installed and configured in a matter of hours, minimizing downtime and effects to staff. The variety of destination types can be changed or added. Options include the bins, tote locations, self-stacking shelving carts, and sort destinations with powered leveling capability.

The library can contact their EnvisionWare Sales Consultant for advice and pricing for expansion or changes.

**Use of remotely accessible cameras by Vendor used in the proposed solution.**

Lyngsoe can utilize cameras for ongoing support of complicated systems.

**The operating system and other applications included are updated by Vendor and serviced at no cost to APL.**

Any operating system upgrades are managed by Windows updates. These adopt the same conventions as any other Windows desktop system. This means that the library can determine how and when updates are scheduled or manually applied.

Software updates and new feature releases are included as part of ongoing maintenance and support. Upgrades will be done remotely and on an "As needed" basis. They will be scheduled with the library to avoid interrupting daily workflows. During the implementation phase of the project, Lyngsoe will establish a point-to-point VPN connection to support the installations and support the systems as they are running production.

**Description of how adjustments are made to the sorting software and System.**

Configuration of the Sort Mate™ sorting matrix is very easy to accomplish, and minor changes can be made in a matter of seconds. All configuration settings are menu driven and are activated on the sorter by a button press.

**The AMH system must be compatible with the ISO/IEC 15693 and ISO/IEC 18000-3**

**Mode 1 standard and with the NISO standard ISO-28560-2 tag data format.**

Compliant. EnvisionWare supports these open standards:

- ISO-28560-2
- ISO-28560-3
- Danish Data Model

And the following PROPRIETARY data models:

- 3M (multiple models)
- Bibliotheca (multiple models)
- Checkpoint ISO
- ITG (multiple models)
- Libramation
- PV Supa
- ST LogiTrack
- Tech Logic (multiple models)
- VTLS
- ID Prefix Remap model

**AMH equipment must be UL listed, OSHA certified.**

Lyngsoe Systems designs and produces equipment that meet or exceed the standards set by both UL and OSHA. The only way to obtain a UL listing for your system configuration would be to perform an onsite inspection by a UL technician; this would add approximately \$10,000 to the proposed cost. OSHA does not certify equipment, but issues guidelines for worker safety and ergonomics for those workstations. We comply with those guidelines.

**The proposed system must not interfere with the other equipment, automated library system clients, or PCs that may be nearby.**

Compliant.

## **Project Plan**

**Detail the Vendor’s anticipated project plan. Include design, manufacture, delivery, installation, testing, and training.**

An AMH project begins with an introductory call in which all library staff and the AMH technical staff are introduced. If part of a larger RFID project, the orientation to the Customer Center will be provided as part of that introduction, otherwise, support will provide the orientation for a stand-alone AMH project.

The Lyngsoe Project Manager will introduce the process in detail and outline each of the steps from engineering site assessment to a release to the factory for production of the system. Every step is carefully managed to ensure the optimal outcome.

Once the installation date is agreed upon, the Lyngsoe Project Manager will inform the library project manager about the steps involved in deployment. A Lyngsoe field engineer will be onsite to receive the equipment and place it in the sorting area. Once the equipment is properly assembled and wired, a commissioning process begins in which the software is loaded and optimized for the Library's ILS and library requirements.

Next an acceptance process ensues in which the system is thoroughly exercised through repetitive tests to ensure optimal performance and adherence to the sorting rules established during planning.

Library staff is provided with operational and basic service training. Upon acceptance of the system, the project transitions to Support.

More comprehensive details are delivered as part of the collaborative planning process.

If removal of an existing system has been ordered, the Project Manager will make the appropriate accommodations for removal of the system just prior to moving the new system into place, after which he will coordinate the responsible disposal of the old system.

## Training

**Please describe Library staff training offered by the Vendor. Please include whether the training is virtual or on-site. Describe all documentation and how it is accessible to Library staff.**

EnvisionWare offers packages that will ensure all customer operators and maintenance personnel have the skills needed to efficiently keep the system in optimal running order. An annual maintenance and operators training is recommended each year to help with any ongoing customer questions.

The EnvisionWare installation team will train library staff, onsite, in three different training sessions: Operator Training, Maintenance Training, and Administrator Training. The level of administrative and support training can be as extensive or as minimalistic as desired by the library.

There is no limit to the number of participants. Any staff training required will be performed as each new system is installed.

### Training Topics:

#### > OPERATOR TRAINING

- Parts Identification Starting/Stopping Sorter
- Emergency Stops
- Patron use of Library Mates
- Staff use of Library Mates and Staff Induction
- Status of Chutes

- Resetting system errors
- > **SUPERVISOR TRAINING**
  - WEB Interface
  - Troubleshooting
  - Critical vs. non-critical issues
  - Intro to MyLyngsoe.com
  - Ordering Replacements for Spare Parts Inventory
- > **MAINTENANCE TRAINING**
  - Overall Review
  - Emergency services Maintenance contracts System upgrades Training
  - Warranty administration

In addition to the above training topics, training selected staff members during sorting system delivery ensures that after installation library staff will be able to make the following adjustments on their own:

- Backdating at the staff induction
- Edit the sorting table of which locations to be sorted into which discharges
- View returns and sorting statistics from the system
- Choose alternative sorting tables, if an alternative or finer sorting is required
- Set up special chutes
- Change display text on patron screen, or receipts

The library will have access to mylyngsoe.com, a portal containing all AMH documentation as well as the EnvisionWare Customer Center where online Knowledge Base articles and videos may be provided for ease of service and routine operator guidance. All documentation is downloadable.

## Financial Information

### **Demonstration of the financial strength and stability of the Vendor.**

EnvisionWare is part of Volaris, a group within Constellation Software, a publicly traded company. Financials for Constellation are available at <https://www.csisoftware.com/category/stat-filings>.

EnvisionWare has been profitably operating for over twenty-five years.

### **State if the Vendor is presently negotiating a sale, acquisition, or merger that would alter the Vendor's existing structure.**

EnvisionWare is not presently negotiating a sale, acquisition, or merger that would alter the existing structure.

**Any other information that demonstrates the Vendor’s experience, ability, and capacity to produce the required outcomes in the RFP.**

If Addison Public Library wishes to see a BISR in action, we recommend visiting Racine Public Library.

### **Parts Availability**

**To ensure ready availability of components, parts, and supplies, all major elements of the system must be warehoused in the U.S.A., or the Vendor must demonstrate the ability to have parts available within 24 hours of request.**

Commonly required spare parts for the proposed sorter will be stocked at the library. Lyngsoe maintains a comprehensive inventory of parts in Frederick, Maryland. EnvisionWare maintains an inventory of spare parts in Las Vegas.

### **Maintenance and Support**

**APL prefers that Vendor support be available during most Library open hours with a response time of four hours or less for critical hardware and software issues. APL prefers to contact Vendors via telephone or web/email-based ticketing system for support requests.**

Details about the Service Level Agreement are provided in the [Sample Agreement](https://system.envisionware.com/customer_agreement) (system.envisionware.com/customer\_agreement).

**Please describe ongoing maintenance and support offered by the Vendor, including availability of telephone or web/email-based support and support response times.**

Customers may access support services via multiple methods shown below. Support may request a remote diagnostic session in which case the library would activate the remote access and have the ability to monitor the remote session. A record is kept of all activities including the names of individuals involved, date of engagements, activities and results. Support access methods are:

#### **Customer Center – Online Portal/Email**

The EnvisionWare Customer Center is a comprehensive self-service portal into the library’s customer relationship. Billing, maintenance records, project status, knowledge base, enhancements, support cases, library marketing kits and more services are available from the online system. To log a support case, log into the Customer Center and select Contact Support. A form opens to facilitate entry of information about the issue. The person entering the Case will receive an email confirmation. Support will engage by email and telephone until a resolution is achieved. Support cases can be linked to enhancement and defect Issues. Customers can view linked Issues from a choice on the menu.

#### **Toll Free Telephone**

The library can call EnvisionWare Support toll free from 8:30am to 7:00pm Eastern Time US. 95% of all incoming calls are answered directly by a technician. The Service Level Agreement defines the maximum time for a response. LIVE telephone support is available 24x7.

## LiveChat

From any computer, log into LiveChat from the Customer Center to discuss a support issue with a support technician during standard business hours. Diagnostic logs are stored on local systems according to system settings. Logs are uploaded via CloudConnect by the library per incident.

Diagnostic sessions use TeamViewer for remote access to applications. Software can be diagnosed and supported remotely. EnvisionWare has a nationwide network of field technicians that can be onsite within 4 hours to remedy hardware issues beyond the scope of library support.

## **Describe any preventative maintenance plans for the proposed solution that the Vendor recommends including recommended APL staff cleaning and maintenance tasks.**

The library will be trained and will be expected to perform routine maintenance on the AMH system. Routine preventative tasks consist mostly of light housekeeping tasks like dusting and inspection. Most hardware repairs are very basic in nature, and since the library is provided with a comprehensive spare parts package to be stored on site and a complete tool kit to maintain the sorter, most repairs can be quickly completed by staff. If a repair cannot be completed by staff, a factory trained technician will be dispatched according to the service agreement.

The proposed sorter will last for a very long time if properly maintained. Primarily, the system should be inspected and cleaned as needed. Depending on system usage and the operating conditions, this could be weekly, bi-weekly, or monthly. During the annual preventative maintenance/service visit, the visiting field technician will work closely with staff to recommend whether a proper schedule is being followed, or if more or less work is required to properly maintain the system.

Planned service visits to the Site(s) are part of good preventive maintenance practice.

The included annual preventative maintenance (PM) visit will give the system an excellent foundation to last for many years. Each visit will last approximately 8 hours including time spent with staff answering questions as well as delivering refresher training sessions. PM visits can be scheduled at times most ideal to the library. Sorter downtime should be anticipated to assure a proper equipment audit.

Parts changed during the PM visit will be covered under maintenance and replenished as used.

## **Warranty and Service Requirements**

### **APL expects to call one toll-free telephone number to obtain all support including software and hardware service for all elements of the system and all transaction assistance with the payment systems.**

Compliant. The [Sample Agreement](#) defines the SLAs for Platinum support. At any hour APL staff can call 888-409-0888 to speak directly with a technician. 90% of all incoming calls are answered live. Onsite service will be dispatched within 4 hours of determining a site visit is required. The maximum time to remedy a major outage is 48 hours but this would be an extreme situation. Generally speaking, EnvisionWare resolves the majority of cases on the first event.

### **Does the Vendor directly provide all hardware and software support for all items**

**proposed? If not, who provides the service?**

Yes. APL can contact EnvisionWare for any needs or issues. EnvisionWare will engage Lyngsoe engineers as needed. Lyngsoe engineers will be dispatched for required onsite services. In situations where it is more expedient and efficient to work directly with a Lyngsoe engineer this model is seamlessly delivered. EnvisionWare ensures that all communication is managed in a manner that provides clear ownership, optimal efficiency, and the appropriate resource to remedy an issue.

**How many full-time support technicians are available in the Midwest (US)?**

EnvisionWare has ten full-time support technicians available in the United States. Lyngsoe has 8 technicians available in the United States. With the volume of Lyngsoe installations in the northern Illinois and southern Wisconsin region, the nearest field technician could be anywhere from 2 hours away to 10 minutes away from Addison. If a technician is desperately needed, realistically, we can be there within minutes and/or hours.

**The Vendor must provide an all-inclusive 12-month extended warranty on equipment, software, and components. A maintenance / service contract must be offered and are subject to negotiation by the library.**

Compliant. The warranty is provided in the [EnvisionWare End User License Agreement](https://system.envisionware.com/eula) (system.envisionware.com/eula). The [Sample Agreement](https://system.envisionware.com/customer_agreement) (system.envisionware.com/customer\_agreement) provides details on maintenance and service.

**The Vendor must offer a 12-month 100% money-back performance guarantee on all equipment purchased and covered by a 12-month extended warranty or service agreement.**

Compliant. The warranty is provided in the [EnvisionWare End User License Agreement](https://system.envisionware.com/eula) (system.envisionware.com/eula).

**Software patches and service pack releases must be supplied at no additional charge to the Library while under maintenance.**

Compliant. Customers under maintenance are licensed to download all hotfixes, service packs, and new feature releases at customer convenience. All updates are cumulative, which means that a library can skip an update if the release does not include a required capability. All subsequent releases will include prior updates.

**Feature updates and new software versions must be included at no additional charge while under maintenance.**

Compliant. Customers under maintenance are licensed to download all hotfixes, service packs, and new feature releases at customer convenience. All updates are cumulative, which means that a library can skip an update if the release does not include a required capability. All subsequent releases will include prior updates.

**Service technicians must be fully trained, factory authorized, and certified by the manufacturer to perform service on the machine.**

Compliant. All service technicians are fully trained, factory authorized and certified by the manufacturer to perform service on the system.

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**PRICING FOR**  
**ADDISON PUBLIC LIBRARY**

**Please provide detailed pricing for the removal of current AMH and the design, manufacture, delivery, and installation of the proposed solution. This should include shipping charges, training fees, and any other nonrecurring costs.**

**Pricing plans should include purchase and leasing options for the required hardware.**

EnvisionWare is happy to provide leasing options for the proposed system. For more information, Peton Nielsen can be contacted.

**Pricing plans should include maintenance options.**

Compliant.

**Guarantees and warranties should be stated in writing and submitted as part of the proposal.**

Guarantees and warranties are provided in the [EnvisionWare End User License Agreement](https://system.envisionware.com/eula) (system.envisionware.com/eula).

**The Vendor shall warrant that the system will meet the reliability and performance requirements set forth in the proposal and will continue to do so if the system remains under vendor maintenance.**

Compliant.

**Bill To**

Addison Public Library  
 2 Friendship Plaza  
 Addison IL 60101  
 United States

<b>TOTAL</b>	<b>\$305,822.00</b>
	Quote Expires: 12/21/2024

Federal EIN	Currency	Terms	Sales Rep
58-2424595	US Dollar	* 5 0 % D e p   B a l - 3 0   Services-Accept	Nielsen, Peton

Quotation Title	Memo
AMH   Replace current sortation - RFP Proposal	



Qty	Item / Description	Ship To	Unit Price	Amount
1	<p><b>SOI-AMH-2K Forecast</b>            AMH Gen2000 Sorting System:            Lyngsoe Dwg: B26248-000-2-0            Library/Branch:</p> <p>Sortation System – Interior / Exterior System (7-bin)</p> <ul style="list-style-type: none"> <li>· Qty (1) Ergo Staff™ ES1200 Staff induction check in station (RFID Top scan barcode Hybrid) with touchscreen interface, height adjustable work surface, backdating</li> <li>· Qty (1) Hold Slip Printer</li> <li>· Qty (1) BISR Bulk induction with Intelligent Recirculation (RFID) with interface to standard style book return</li> <li>· Qty (1) Sort Mate™ SM2000 High-Speed Sorter with 7-destinations</li> <li>· Qty (1) LSC – Lyngsoe Sort Controller advanced software</li> <li>· Qty (6) Sort Trolley destinations with chute full capability</li> <li>· Qty (1) Sort Trolley destination exceptions bin with chute full capability</li> <li>· System Delivery and Set up (non-union)</li> <li>· Shipping</li> <li>· Parts Warranty (Standard 12 month)</li> <li>· Hotline (24/7) (Standard 12 month)</li> <li>· Spare Parts (on-site kit)</li> </ul> <p>Sort Bins</p> <ul style="list-style-type: none"> <li>· Qty (7) Sort Trolleys™ Medium</li> </ul>		\$305,572.00	\$305,572.00
1	<p><b>AMH-2K PS</b>            AMH Gen2000 Project Management</p>		\$250.00	\$250.00



# Quotation

US-89707

9/22/2024

<b>Subtotal</b>	\$305,822.00
<b>Discount</b>	
<b>Freight</b>	\$0.00
<b>Tax</b>	\$0.00
<b>PST-CA</b>	

Freight charges are estimated; actual charges will be billed.

Send your purchase order or email confirmation to:

**EMAIL :** [orders@envisionware.com](mailto:orders@envisionware.com) | **FAX :** +1 678.382.6501

Use of EnvisionWare, Inc. Products is subject to the terms and conditions in the end user license agreement found at: <http://system.envisionware.com/terms>. By signing this quote or issuing a purchase order, you indicate your approval of EnvisionWare's terms and conditions.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

<b>Total</b>	<b>\$305,822.00</b>
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FE Technologies  
RFID your way



Addison Public Library

AMH System and Related Installation, Training, and Support  
Services

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## Cover Letter

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Dear Brooke Sievers,

We at FE Technologies are thrilled to present a comprehensive solution that not only meets but exceeds the expectations outlined in your RFP. We understand the importance of efficient materials handling, especially during your construction phase, and are confident that our innovative solutions will provide significant benefits to Addison Public Library and other SWAN locations.

### Meeting Your Needs and Beyond

Your RFP calls for a 7-9 Bin Automated Materials Handling (AMH) unit to streamline the processing of materials. While fulfilling this requirement is a great start, we believe in going the extra mile. Our proposal includes the industry's only semi-automated return solutions, designed to enhance your operations during the construction phase.

### Introducing Sort Assistant

Our Sort Assistant software offers a revolutionary approach to materials processing. The Sort Assistant allows you to process materials up to five times faster than traditional methods, significantly improving efficiency. Many of our library clients describe the Sort Assistant as "life-changing," and we are confident your staff will share this sentiment once they experience its benefits.

### Comprehensive Solution for Construction Phase

Our proposal includes everything necessary to maximize efficiency during your construction phase. The Sort Assistant software will streamline the returns process, saving countless hours of staff time each week. For example, the McKinney Public Library in Texas reported saving up to 52 hours per week at one branch, processing an annual circulation of over 400,000 items. Used in conjunction with our RFID-enabled Check-In Bin and Live Scanning Wand rest assured your construction will not be a heavy burden for your check-in processing.

### Key Features of Our Proposal

- **Bookmatic Sorter:** Our AMH system simplifies the circulation process, ensuring materials reach their intended destinations efficiently. With an extensive number of sort destinations and criteria, staff can limit touches and improve overall efficiency.
- **Small Footprint:** Our Bookmatic sorter tables are available in two sizes (25.59" and 19.68"), offering a smaller footprint than standard legacy systems. This design increases possible destinations while saving valuable space in your work area.
- **Service and Support:** Our US-based technical support team is highly experienced and reliable; ensuring ongoing service and support you can trust.

**Proven Track Record**

With over 2,600 sites installed to date, FE Technologies has a proven track record of delivering AMH projects on time and to specifications. We are confident that we are the ideal partner for Addison Public Library's AMH refresh project, ready to embrace the future with a range of innovations that will propel your library forward.

Thank you for considering FE Technologies. We look forward to the opportunity to work with you and provide a solution that will significantly enhance your library's operations.

Sincerely,

A handwritten signature in black ink, appearing to be 'S. Gage', with a long horizontal line extending to the right.

Scotty Gage

VP of Sales North America  
Ph: 888-278-1824

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## Company Information & Executive Summary

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Invengo American Corp, DBA FE Technologies, is privately owned company, owned by Invengo International.

We have been providing library RFID products and services since our incorporation in 2008 and we are now one of the fastest growing library RFID suppliers in North America.

FE Technologies is proud to boast some 2600 sites installed to date with our innovative range of library RFID products.

FE Technologies employs some 45 staff with offices in:

- Dallas, Texas
- Geelong, Australia
- Singapore
- Marseilles, France

FE Technologies has over 16 years' experience in the installation and ongoing support and maintenance of library automated materials handling solutions.

Based in Texas, our team is dedicated to helping libraries achieve the very best interaction with their communities, patrons and staff by providing innovative RFID products that have been designed in conjunction with Public Libraries.

Our products are designed to improve circulation, enhance the patron user experience to encourage return visits, and to allow staff to provide the best service to patrons without being tied to menial tasks.

Our offering of the Bookmatic Sorter brings a superior sorting solution with the largest range of bin options allowing the library to streamline your materials handling processes and minimize manual handling. The Bookmatic Sorters feature state-of-the-art engineering designed for busy public libraries and some truly clever space-saving initiatives. Our Sorters have many advantages including superior user experience for both patrons and staff, and excellent adherence to the strictest safety guidelines.

We are proposing a returns and sorting system designed specifically for the Addison Public Library which includes:

- The innovative and technologically advanced FE Technologies Bookmatic Sorter, fast, accurate, and efficient
- Choose between 7-9 ergonomic electronic bins or budget-friendly spring bins.
- Internal and external patron inductions designed to allow multiple item returns for equitable access to the whole community

- A Staff Return system that's speedy, accurate and easy to use
- The innovative FE Technologies Singulator which buffers and separates multiple returned items and feeds them onto the sorter component one at a time.
- A range of Intelligent Returns solutions to allow the library to continue the fast and efficient processing of returns during the construction phase of the project for the months that the library will be in between AMH solutions.

And you can rest assured your project will be delivered by our experienced Project Management Team and supported ongoing with our local team of Technical Support Officers delivering FE Technologies renowned 1-hour Work Ticket response time.

We look forward to working with the Addison Public Library to deliver a truly innovative returns and sorting solution for all the phases of the proposed project.

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## Description of Proposed Solution

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**Internal, book-drop style patron induction with sufficient aperture to accept most oversized books. The induction should not have a screen or receipt printer. The induction needs to accept multiple items at once.**

The proposed internal book drops will enable patrons to return multiple items simultaneously. These items will be placed onto a conveyor, which will then feed into the Singulator. The Singulator will separate the items and feed them one by one into the Sorter. The Singulator is described as follows:

Many libraries now request the ability to return multiple items at once, a function that many sorters previously lacked, requiring patrons to deposit items one by one to ensure accurate sorting. A great solution is the inclusion of return chutes that allow patrons to return multiple items simultaneously, combined with an FE Technologies Singulator. There is also a provision for staff to return multiple items from the staff side.

FE Technologies has developed a solution that effectively desingles, or separates, multiple returns so they can be fed into the sorter module one at a time. This allows patrons to enjoy the convenience of multiple item returns, reducing queues associated with single-item inlets, which is crucial for libraries with high circulation volumes. The FE Technologies Singulator features components engineered to gently separate items, including:

- **Buffer** – Manages sudden large volumes of items and controls the rate at which they are fed onto the Singulator.
- **Angled conveyor** – An incline with rubber grips and Perspex “fingers” to gently separate items.
- **Sensors** - Detect how many items are passing by each point, ensuring items are fed one at a time into the sorting module where they are sorted into the appropriate bins according to the sort matrix.
- **Reintroduction unit** – a gravity fed system that re-feeds any items not successfully separated back into the buffer to start the process again, ensuring all items are separated.



This product eliminates the need for an extra bin to handle non-separated items and does not require staff intervention for emptying the bin or manually separating items. It also has a small footprint for such a feature-rich device.

**External, book-drop style patron induction with sufficient aperture to accept most oversized books. The induction should not have a screen or receipt printer. The induction needs to accept multiple items at once and function during inclement weather (e.g., rain, snow, ice, wind).**

The Proposed External Bookdrop is designed for outdoor use, accommodating for drive- returns. It allows patrons to return multiple items simultaneously from their vehicles, which are then fed onto a conveyor, into the Singulator, and finally into the automatic Sorter. Constructed from stainless steel, the External Bookdrop is built to be robust and withstand various weather conditions and water ingress. Its opening is specifically designed to minimize the insertion of non-library or foreign items.



Drive Up Book Drop



Internal Book Drop

**A height-adjustable staff induction with a barcode scanner and RFID reader.**

### Bookmatic Staff Induction

We understand that being a part of a consortium where libraries have not converted to RFID creates some challenges. The main challenge is how you process returns from libraries that are not tagged. The height-adjustable staff induction is the perfect answer. The Bookmatic Staff Induction is designed for library staff to efficiently handle the check-in, sorting, and transportation of library items.

Using the Staff Induction for returning items is quick, does not disrupt the patron return process, and may help reduce repetitive strain injuries among staff. It is particularly useful for processing items from other branches, returns through chutes (book drops), or service desks.



The unit is height-adjustable, allowing for ergonomic operation whether the user is standing or seated, regardless of their height, build, or disability status. The height is displayed to the user, enabling precise adjustments each time.

There are many possible configurations of an Inlet, but a basic configuration of an Inlet has:

- A PC for the Patron facing GUI and communication with ILS and machinery.
- An RFID-reader and antenna for reading RFID-tags.
- A touch screen for displaying and interacting with the GUI.
- A motor to drive belts that convey items forward in the sorter.
- Sensors to detect the location of returned items.
- Sensors to automatically start the check-in session (if the software is configured to do so).
- A barcode scanner.

## Destacker

The innovative Destacker allows staff operating the Sorter to quickly build a stack of items and let the Destacker automatically feed the items one at a time onto the FE Technologies Staff Induction Unit (described below). This allows the staff to perform other functions, which is useful in busy periods or periods with limited staff on site. With a push of a button, the shelf of the Destacker goes to the low position to allow staff to build a stack of items to be sorted. When activated, the Destacker utilizes photo eyes and the connection to the Staff induction Unit to automatically feed the items one at a time onto the staff induction where the check-in to the ILS is taking place. The Destacker can be disconnected to allow staff to feed the Staff Induction Unit directly to allow for a higher sorting rate.

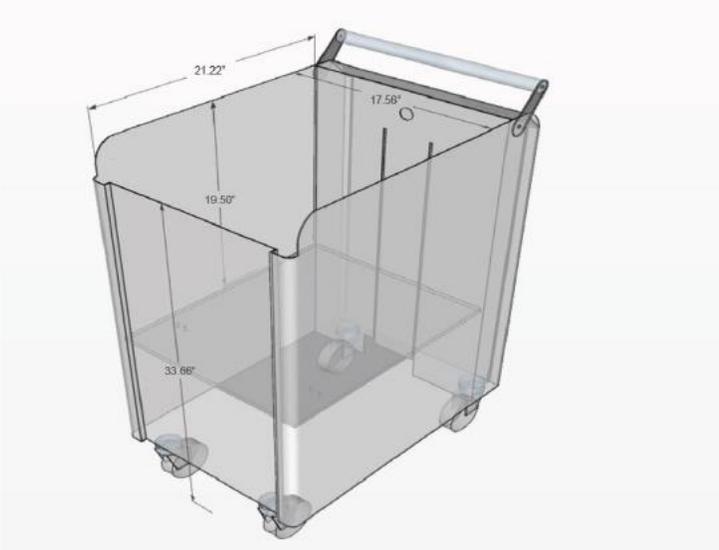


**Description of bin system based on the recommendation of the Vendor. Include options for 7 and 9 bins. Include options for spring-loaded bins and bins that use electric power to raise the bin floor.**

## Electric Bin

The automatic AMH return bin features a motorized, battery-powered internal base that adjusts its height using sensors. This electronic height adjustment mechanism ensures items are safely transitioned into the bin. Built-in sensors maximize the bin's capacity by lowering the base as items enter and raising it when items are removed. For safety, all electronics are securely housed within metal covers.

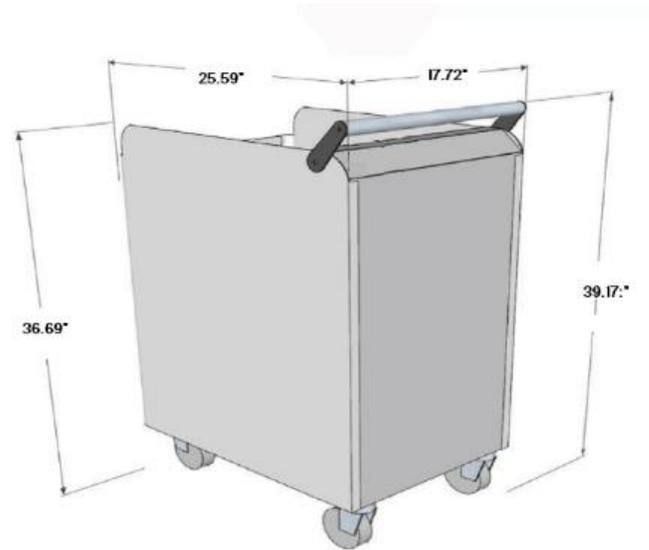
The dimensions are shown below:



### Spring Bin (optional)

This premium, spring-loaded bin offers excellent value. Its innovative design features a base that lowers as it fills and raises as items are removed, minimizing the need for library staff to bend and lift frequently.

The dimensions are shown at right:



**Allows staff to choose between two or more sorting strategies depending on need.**

Different sorting strategies can be activated either manually on the machine or via the admin platform. In addition, libraries can store a calendar in which times can be configured so that a range of sorting strategies can be in place depending on the day of the week, time, holidays or other conditions.

New Calendar

Name

Description

Events

ID	Name
----	------

Device

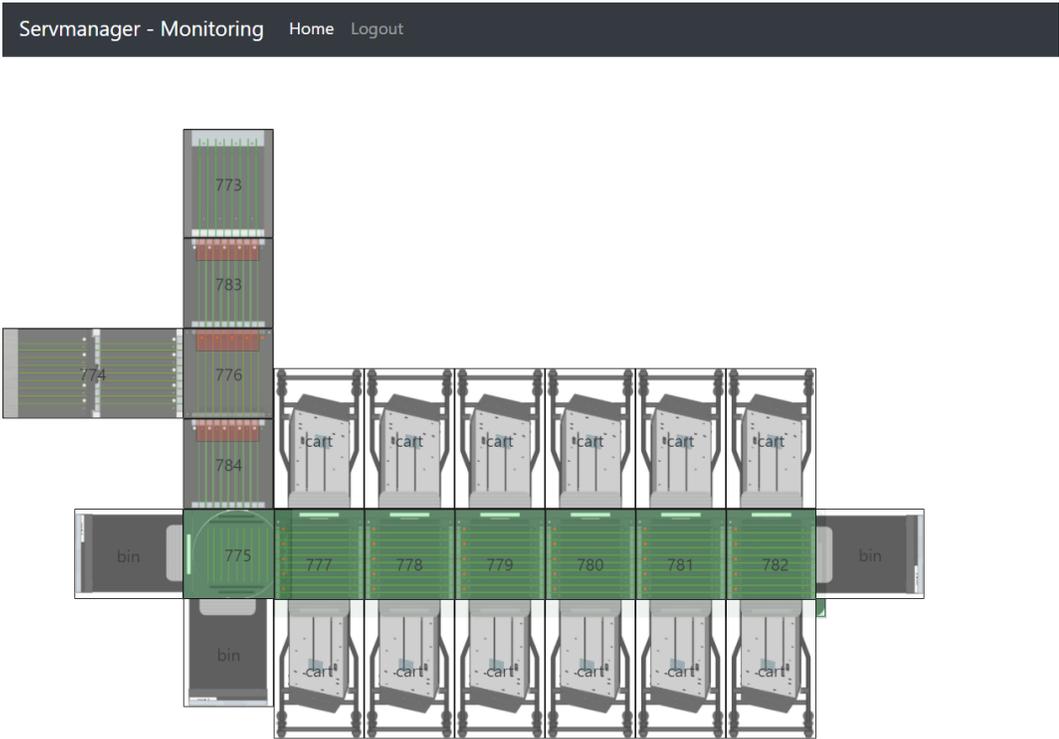
ID	Name	Product	Behaviour
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Doors

**Ability to send notifications via email when the AMH is not functioning as expected or a bin is full.**

Via the Sorter Software (and via email alerts), staff can view alarms and alerts, device status (bins full, offline etc.)

The sorting system is monitored via software or the admin platform. All modules of the system including their status are displayed. This view can either be accessed via admin platform or displayed via local monitor.



**System provided transaction logs and detailed statistics reporting.**

Via the Sorter Software, staff can view statistics on inventory per bin, alarms and alerts, item traffic per hour/day, hold items, exceptions, and device status (bins full, offline etc)

Category	ID	Name	Unit	Count	Status	Errors
Home	434	MOD_19	Bookmatic S Module	K krs	0	offline Danger error!
	435	MOD_20	Bookmatic S Module	K krs	1	online
Statistics	436	MOD_21	Bookmatic S Module	K krs	65	error Warning error!
Alarms	437	MOD_22	Bookmatic S Module	K krs	1	online
	438	MOD_23	Bookmatic S Module	K krs	1	online
Inventory	439	MOD_24	Bookmatic S Module	K krs	1	online
	440	MOD_25	Bookmatic S Module	K krs	1	online
Reservations	441	MOD_26	Bookmatic S Module	K krs	1	online
Access Control	442	MOD_27	Bookmatic S Module	K krs	1	online
	443	MOD_28	Bookmatic S Module	K krs	1	online
Device / Status	444	C KOLA 14	Kolakuljetin jyrkkiin asennuskulmiin	1 - K krs	0	offline Danger error!

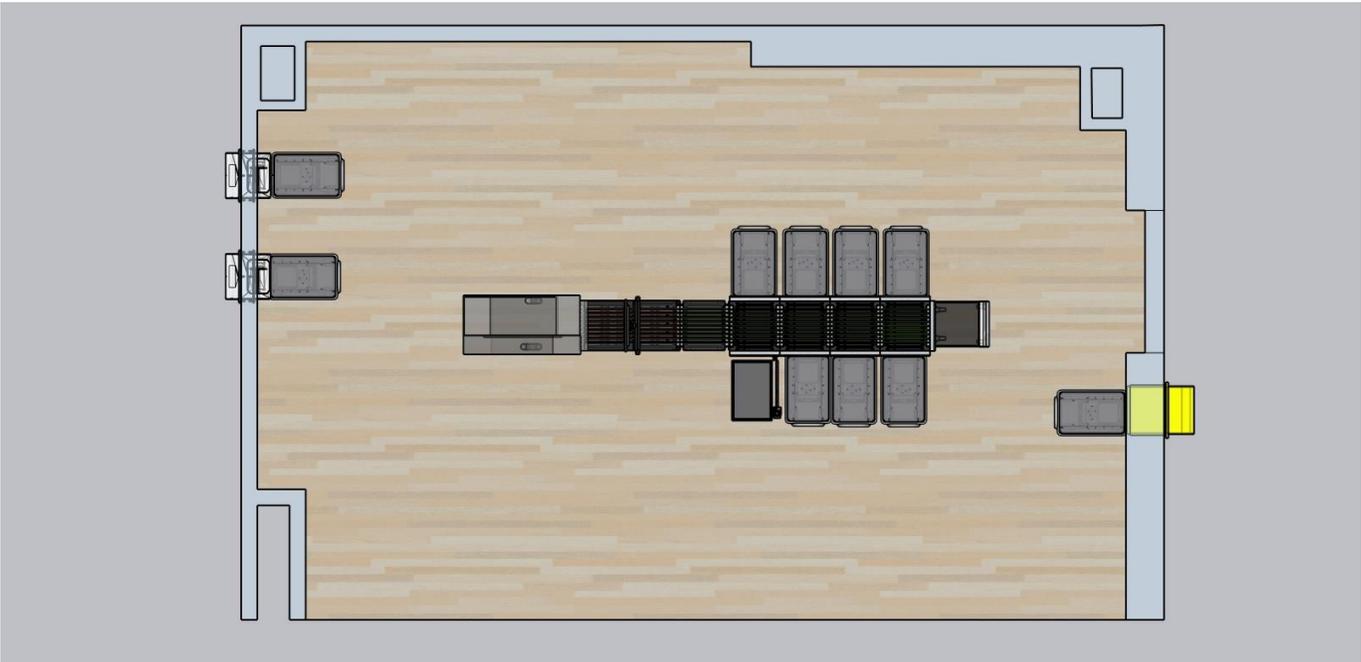
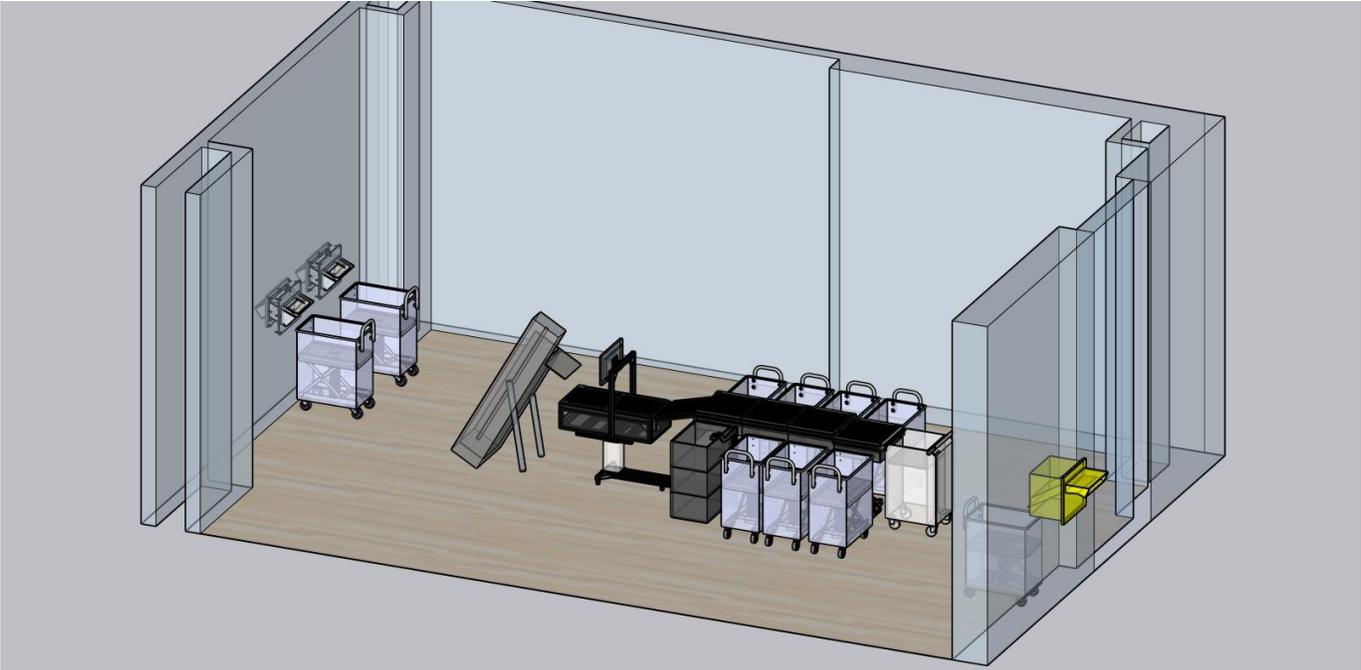
**Ability to separate stacked items. Specify the separation accuracy for the proposed layout(s).**

The FE technologies Singulator is used to separate items. The Singular has been described in detail above. It is highly accurate, with a reintroduction unit which is a gravity fed system that re-feeds any items not successfully separated back into the system to start the process again, ensuring all items are separated and no staff intervention is needed.

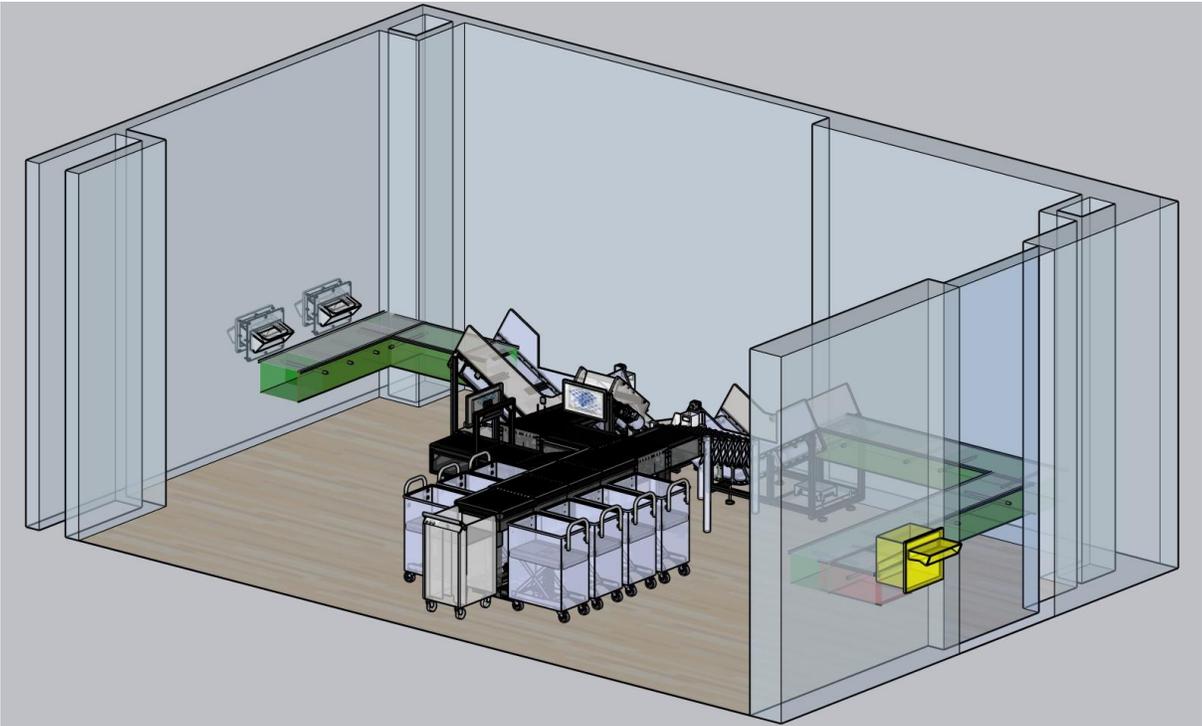
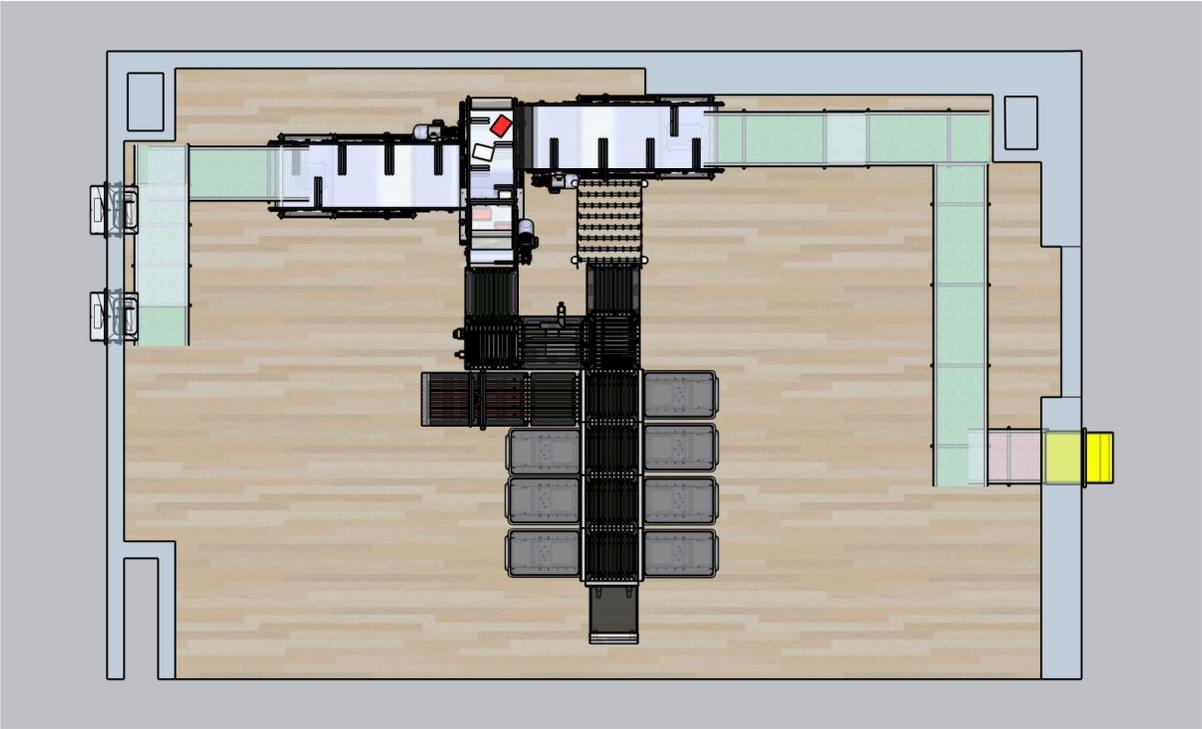
# AMH Drawings

FE Technologies is pleased to present the following concept drawings for the Library’s consideration. Note that our solution is flexible and modular. We can adjust the layout and configuration according to the library’s requirements.

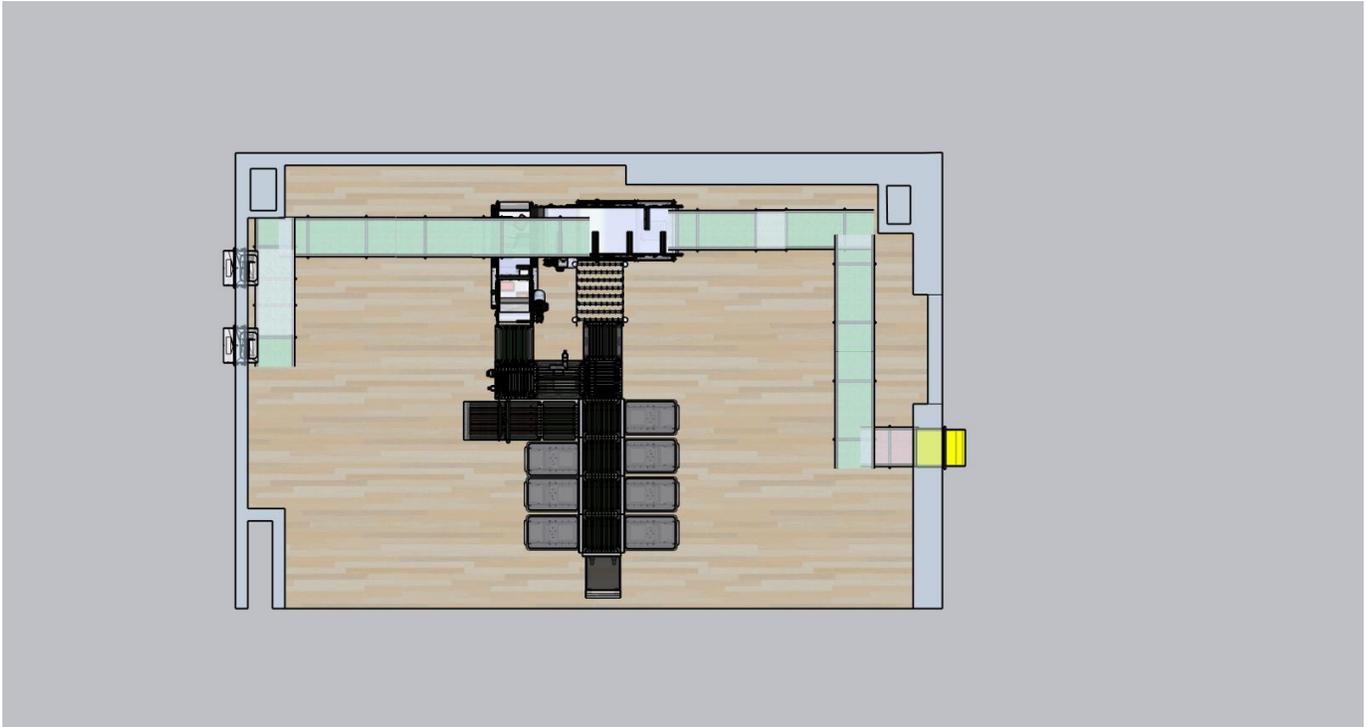
Option 1



Option 2



Option 3



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## General and Technical Requirements

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**Interoperability with SirsiDynix Symphony via SIP2 or API connectivity.**

The FE Technologies Bookmatic AMH system communicates with the ILS via SIP2. We are compatible with the ILS Symphony.

FE Technologies is an accredited SirsiDynix partner, and we have worked with SirsiDynix and their ILSs over many years with a large range of libraries who use these ILSs. Our strong partnership with SirsiDynix, along with access to the ILS sandbox for testing and development, ensures that our systems are fully compatible and optimized for your library's needs.

## **Ability to print hold and transit slips at the staff induction without the item needing to be sorted into a bin.**

At FE Technologies, we understand the importance of efficient and streamlined processes in libraries. That is why we highly recommend the use of our Stacking Carts or Sort Assistant for the printing of hold slips. They both provide fast and efficient solutions for staff to quickly process holds and get them in the hands of the customers. With many holds coming in from other SWAN libraires both tagged and not tagged, processing can become cumbersome. We want to give you options that help you create new processes that fit your needs. Our proposed AMH allows for printing hold and transit slips on the AMH if that is the solution that best fits your needs.

### **Stacking Cart Solution**

When using the Stacking Cart on the AMHS, RFID tagged items on hold will be sorted to the cart. The cart is taken to a designated print station. This enables librarians to quickly access the cart and retrieve the hold slips in a systematic manner instead of a stop and go process on the AMHS.

The hold slips are printed in the same order as the items on the stacking cart, further enhancing efficiency and accuracy. This means that librarians can effortlessly retrieve the first hold slip from the printer, apply it to the corresponding item, and continue the process seamlessly. The printer is set to print the next slip once the previous slip is removed.



FE Technologies' AMH Stacking Cart is expertly designed to seamlessly receive items from an automated sorting system. Once filled, the cart can tilt to a horizontal position, enabling library staff to easily reshelve items with optimal visibility. Equipped with advanced electronics, sensors, and a reliable Lithium-Ion power system, the Stacking Cart can perform flawlessly either docked at the sorter or among the shelves. With the press of a button, the cart effortlessly transforms into a shelving cart, minimizing manual handling during the reshelving process. This innovative and battery-operated solution ensures quick and efficient reshelving.

## Sort Assistant Solution

When using Sort Assistant staff can place multiple items on the reader and process the RFID tagged holds quickly and efficiently. Any non-tagged items can be scanned with a barcode scanner and a slip printed.

The Sort Assistant has revolutionized the sorting process for hundreds of libraries, transforming returns rooms without the expense and large footprint of an automatic sorter. The Sort Assistant software operates on a local PC with the Circulation Assistant reader pad. Libraries can use their own printer and barcode scanner, or these can be provided by FE Technologies if needed.

This unique Library RFID product significantly reduces the time required for returns and sorting in a returns room, without the need for an automated materials handling solution. **McKinney Public Library** reported that the **Sort Assistant was 5X faster** than their previous method of checking in one item at a time on their old staff stations. They found the Sort Assistant so effective at one branch that they added another at their other branch to help clear the exceptions bin of their sorter. The Sort Assistant enables library staff to process multiple items in the returns room in a single step.

The Sort Assistant features a sophisticated color-based destination sort interface that also handles all exceptions in a single process. It should not be confused with a standard staff station pad offered by other vendors, which simply allows the check-in of tagged items. The Sort Assistant is a unique product that excels in fine-level sorting. Multiple returned items are placed on the Sort Assistant's RFID pad, and the system displays the sort criteria for each item via color-coded bars.

You can configure the Sort Assistant to sort by any SIP2 call from the ILS making it the most flexible sorting tool on the market. The various sort criteria include the following:

- To be shelved in this library
- Return to another destination (with destination details and optional transit slip)
- On Hold for a patron in this library (with on optional hold receipt printing)
- Sort by Call Number
- Sort by collection code
- Sort by Dewey Classification
- Sort by location code
- Sort by media type
- Sort by SIP2 screen message

Returns			
FET0025	Everything You Ever Wanted to Know		
AVIN004	The \$100 Startup	Return to HASTINGS	
AVIN002	Good To Great	Return to FLAXMERE	
AVIN003	7 Habits Of Highly Effective People	Return to HAVELOCK	
AVIN001	The Art of War - Sun Tzu	On hold Paula Murdoch HDC001	
FET0022	Dreaming of the Bones BOOK	On hold Mya Robertson 10001	

### **Ability to add length for additional bins in the future.**

With a small footprint and a highly modular design, components such as transport tables and additional sorting destinations in the form of bins or totes (or a mixture of these) can be added at any time and with minimal interruption and downtime.

FE Technologies leverages programmable logic features, such as the Load Sharing Unit (LSU) on each sort table, offering several advantages over a single PLC-controlled sorter:

- **Simplified Expansion:** Adding extra sort tables with LSUs only requires software changes, unlike the reprogramming needed for a single PLC system.
- **Hardware Flexibility:** Expanding a sorter with LSUs does not necessitate hardware upgrades, whereas a centralized PLC system might need a larger PLC for expansion.
- **Ease of Software Management:** The software for LSUs is less complex and easier to modify compared to that of a centralized PLC.
- 

### **Use of remotely accessible cameras by Vendor used in the proposed solution.**

Our innovative sorter webcam provides real-time visibility into your sorting system's behavior. By leveraging this technology, we can observe and analyze the sorter's operations remotely, ensuring optimal performance and addressing any potential concerns proactively. The use of the webcam is controlled by the library, it is not enabled unless the library gives permission for its use.

### **The operating system and other applications included are updated by Vendor and serviced at no cost to APL.**

Our development cycle is based on Agile Systems – it is a continuous cycle of improvement that relies on customer feedback and ideas, as well as quality assurance testing in the lab and onsite. We perform monthly “sprints” which include software improvements, and we release a new software version every 6-8 weeks. This is provided to all our customers on the Warranty and Support Agreement free of charge. Version releases may contain a combination of new features, new products, bug fixes and enhancements. The release notes are published via our Technical Support Portal Website and are also available directly from FE Technologies.

### **Description of how adjustments are made to the sorting software and System.**

FE Technologies Bookmatic Sorter lets staff create multiple sorting strategies, which can then be put into place as needed or they can be scheduled via a calendar application. The system can be configured with a sort table that includes transit destinations allocated to each bin, with exception items being automatically sent to an exception bin, for example.

The system can be reconfigured by easily changing the number of physical sorting tables. The sorting

schemes can be quickly and easily changed. There is also a calendar option to allows staff to change the sorting algorithm based on time of day, day of the week, holidays or other conditions.

In terms of physical expansion, the system is highly modular and with a small footprint compared to our competitors, so the library has the option to add additional bins as new sorting destinations in the future; and with minimal software updating/reconfiguration required.

### **Configuration of the sorting matrix**

SIP2 and NCIP-based sorting strategies are separated by different tabs in the settings interface. Using a matrix similar to SIP2, the NCIP sorting rules are defined using string patterns. The parameters for each sort target are listed in the table. Depending on the requirements, there is the option to choose whether a certain string must appear or not appear. Multiple sorting strategies can be defined and selected from the admin screen. This is possible either locally or remotely via the admin platform with just a few clicks.

As soon as a return has been accepted by the ILS, the sorting matrix is checked, and the final sorting target is calculated. Each sort target has a row in the sort matrix. Several different criteria can be defined for each series. These criteria are based on the data that can be transmitted via the NCIP interface. In addition, it is possible to assign one or more fallback targets to each sorting target in case the original destination is not available or is full. When all conditions are fixed, the sorting destination is set, and the item is transported to its destination.

### **Access to sorting criteria/strategies and their configuration.**

We offer you three ways to access and change the sorting criteria.

1. Via Sorter software on the Sorter itself

Bin Nro.	OK	Alert	CT	AQ	AF	CL	CK	CS	CR	AJ	Tag	CV
35,36,37	1	z	*	*	*	*	*	*	*	*	*	*
9	1	*	h00???:*	*	*	*	*	*	*	*	*	*
9	1	*	+:	*	*	*	*	*	*	*	*	*
36,33,35	1	*	*	*	*	*	*	+BESTSE	h00al+h00r	*	*	*
3	1	*	*	*	*	*	*	+BESTSE	h00al+h00r	*	*	*
18	1	*	*	*	*	*	*	*	h00uo	*	*	*
25	1	*	*	*	*	*	*	*	h00yo	*	*	*
28	1	*	*	*	*	*	006	*	h00al	*	*	*
28	1	*	*	*	*	*	006	+=798.?	h0011	*	*	*
15	1	*	*	*	*	*	*	+SAATEEN	+h00	*	*	*
27	1	*	*	*	*	*	*	+=788.6	+h00	*	*	*
11	1	*	*	*	*	*	*	+=749.1	h00al	*	*	*
4,5	1	*	*	*	*	*	000	+=798.2	h00al+h00r	*	*	*
27	1	*	*	*	*	*	*	+=798.2	h0011	*	*	*
15	1	*	*	*	*	*	*	+NUORET	+h00	*	*	*
16	1	*	*	*	*	*	*	+LJUDB+	h00al	*	*	*

Max bin: 37  
 Reserve bin: 21  
 Reject bin: 3

CT = Destination Location  
 AQ = Permanent Location  
 AF = Screen Message  
 CR = Collection Code  
 AJ = Title Identifier  
 CS = Cell Number  
 CV = Alert Type  
 CK = Media Type  
 CL = Sort Bin  
 Barcode = 1  
 Tag = 2  
 Empty Tag = 3

2. By directly accessing and modifying the XML files in which the sorting criteria are stored.

ResSortMatrix	9.12.2021 15.01	XML Document	2 kt
SortMatrix	9.12.2021 15.01	XML Document	2 kt
SortMatrix2	9.12.2021 15.01	XML Document	2 kt
SortMatrixNcip	9.12.2021 15.01	XML Document	2 kt
SortMatrixNcip2	9.12.2021 15.01	XML Document	2 kt

3. Via the Admin Platform on the Sorter Software

Home | Settings | Statistics | Alarms | Inventory | Reservations | Access Control | Device / Status | Admin | Mika Vacker | Logout | Mikro-Väylä Oy | Mikro-Väylä Oy, Helsinki | English | Finnish | Swedish | Norwegian | Danish

Settings:  Sorter inlet1,  Sorter inlet2,  Sorter inlet3

Settings dropdown menu: SortMatrixNCIP, UserText, DeviceSettings, Receipt

Adding new sorting strategies – staff can implement a sorting strategy to commence at a particular time and continue for any number of hours or days.

New Event

Name: SortMatrix1      Calendar: Sorting rules weekdays

Comment: Sorting rule for weekdays

Whole Day Event

Day: 2021-12-20      Start: 08:00      End: 22:00

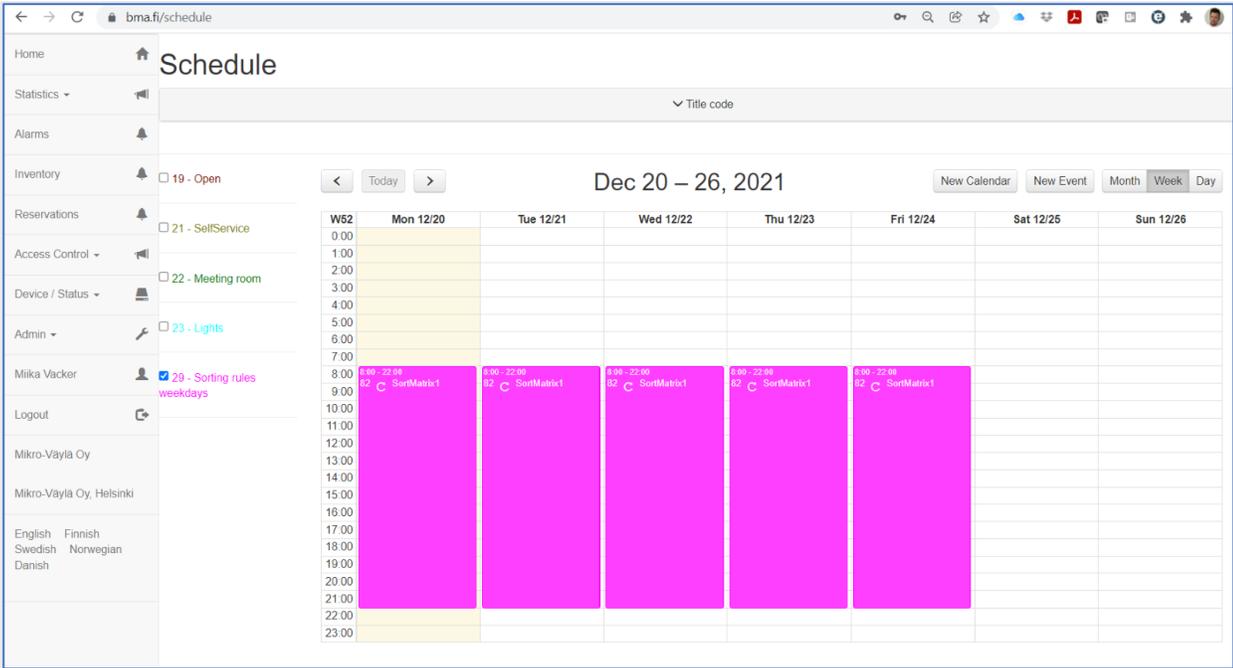
Repeat Event

Week: 1

Monday       Tuesday       Wednesday       Thursday  
 Friday       Saturday       Sunday

Save      Close

Set the calendar event for which the sorting strategy will be used. Staff can then select which sorting strategy to implement at any given time.



**The AMH system must be compatible with the ISO/IEC 15693 and ISO/IEC 18000-3 Mode 1 standard and with the NISO standard ISO-28560-2 tag data format.**

The proposed FE Technologies Bookmatic Sorter is compatible with these standards.

**AMH equipment must be UL listed, OSHA certified.**

Our solution complies with this requirement.

**The proposed system must not interfere with the other equipment, automated library system clients, or PCs that may be nearby.**

Our solution complies with this requirement.

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## Project Plan

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**Detail the Vendors anticipated project plan. Include design, manufacture, delivery, installation, testing, and training.**

### Overview

A well-executed roadmap by an experienced team significantly enhances the likelihood of a successful project. FE Technologies has documented each step of the journey that library staff will undergo to successfully refresh the AMH in their library. The installation process has been developed and refined based on experience of converting hundreds of library collections to RFID and installing over 60 individual sorters around the world of various sizes and complexity.

**We anticipate a delivery timeframe of 22 weeks from date of order.**

FE Technologies uses a specialized Project Management Team to implement each project that has direct access to the resources of our Support, Research and Development, Customer Service and Production Teams.

### The Project Management Team

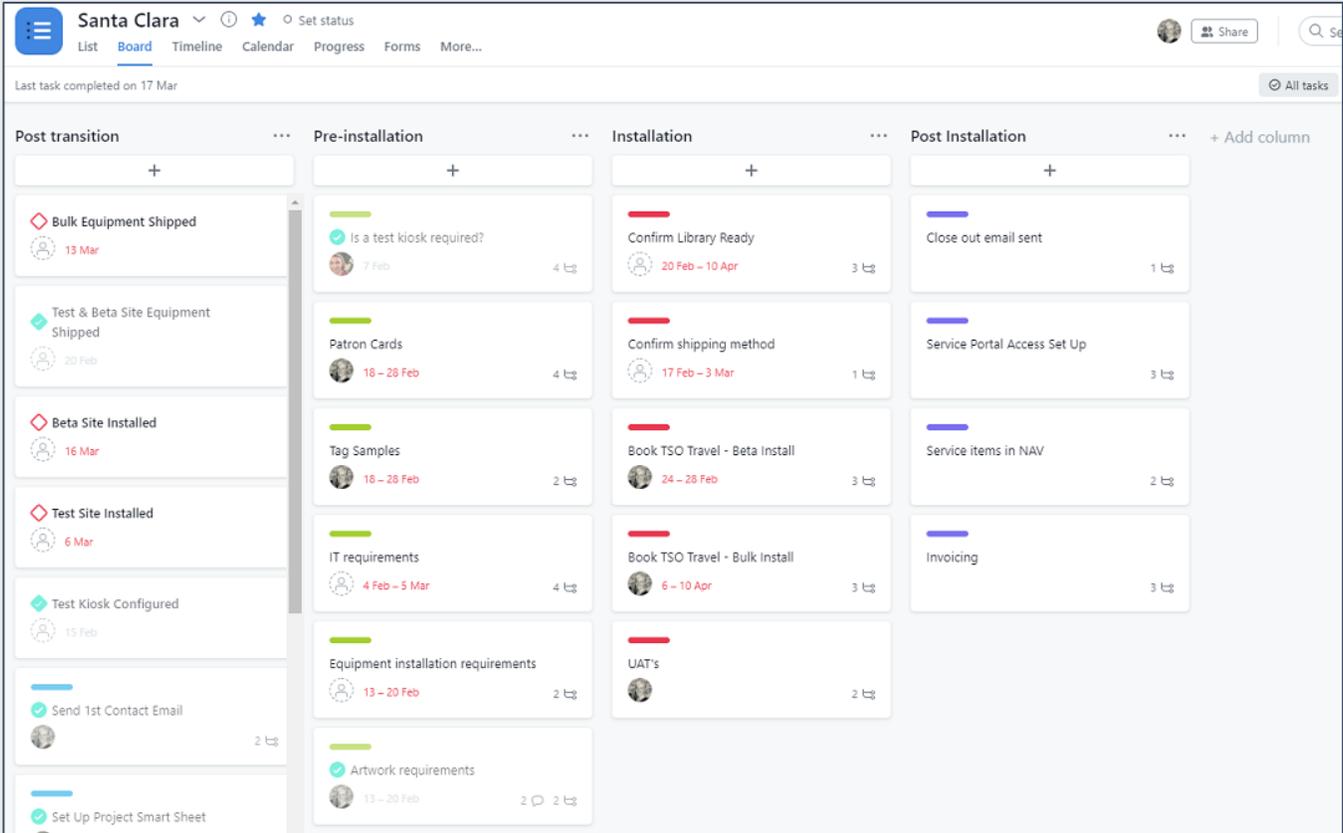
**Project Manager** - The Project Manager takes overall responsibility for ensuring that the library's expectations are met. The Project Manager is your immediate point of contact during the project. Besides chairing regular project meetings, the Project Manager will supervise onsite visits by Technical Support Officers to review the positioning of the RFID equipment and conducting the training.

**Projects Coordinator** - The Projects Coordinator will assist the Project Manager during the project and being office based all the time provides an extra communication point. Arranging the customization of the equipment, delivery, updating project minutes and coordinating travel arrangements are core to this role.

**Installation Team** - The Installation team is made up of our Technical Support Officers. The officers are available for installations, and they are responsible for installing and commissioning the RFID equipment on site. The installer is responsible for the software installation and integration with your Library Management System with SIP2. This work is done both remotely and on site depending on the size and complexity of the installation. Training will be performed on "live" equipment after installation has occurred.

**Experience of the Proposed Team** - Our proposed Team have worked together on over 1000 individual library installations as a team. The team have project-managed large and small sites, multi-branch sites and sites with various ILSs, and have worked with architects and new or partially complete libraries. There is virtually no installation scenario that the team have not handled in the past.

A Cloud-based project management tool lets our team keep up to date with the timelines for all parts of your project allowing them to always adhere to deadlines and to stay on track when it comes to collecting vital information and keeping libraries informed on the progress of their project. See screenshot below.

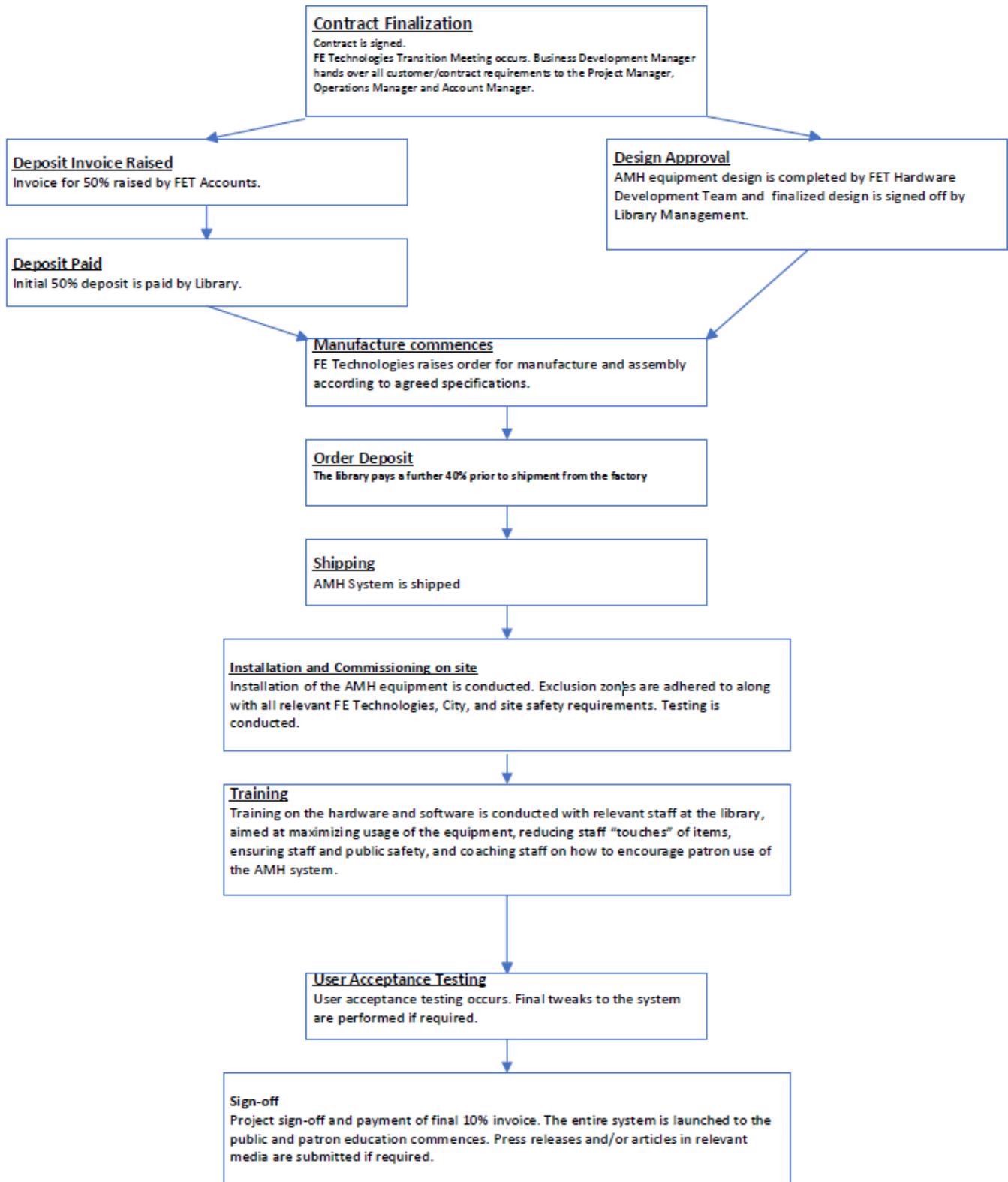


## The Process

Step	Description
Contract award	The final contract is signed, and a Transition Meeting is held. The Transition Meeting is a documented and formalized way for FE Technologies obtain the necessary information to commence the project. Key items include Branch and stack mapping and item file information for the tagging conversion project; AMH specifications such as number of sorting destinations and layouts; sharing of contact information and a handover of contract and customer information from FE Technologies' Business Development Manager to the Project Manager, Operations Manager and Account Manager.
Design Confirmation	Deposit invoice for 50% is raised and paid. Design of the AMH layout, sorting destinations and bin/tote/trolley type is finalized and signed off by Library Management.
Manufacture and assembly Shipment	Manufacture commences including assembly instructions according to the signed off specifications of the sorter componentry. A 40% deposit payment precedes shipment of the AMH system from the factor and the unit is shipped directly into site by our specialist freight company.
Installation	The Bookmatic Sorter is installed on site according to safety requirements and taking into consideration any exclusion zones relating to other RFID/electrical equipment. Testing and commissioning are performed, including testing SIP2 responses from the ILS to ensure the required sorting algorithms operate correctly for each sort destinations.
Training	Training on the sorter hardware and software is performed including the safe handling of materials focussing on minimizing item touches and repetitive handling, along with safety stops and sorter safety requirements. Sorter table and algorithm configuration training is provided to higher level managerial and/or IT staff also.
User Acceptance	A detailed user acceptance testing checklist lets the Library test out all required functionality to ensure the sorter is performing to its specifications. Finaly adjustments are made to the system if required at this point.
Project Sign-off	The project is finalized and signed off by the Library and the final invoice instalment of 10% is paid. The AMH is launched to the public and patron education on how to use the system commences. The new system is announced via press/media as required.

The process flow is shown below:

AMH System and Related Installation, Training, and Support Services



**Responsibilities and Scope**

In general FE Technologies will perform all installation and testing works that relate to the RFID equipment, and all maintenance and support work ongoing. The Library will need to give us building access and ensure that the appropriate power and data access is available. We also ask the library to complete a pre-installation checklist that includes some detail on your ILS and an item file. The table below defines the scope of the project in more detail.

The purpose of this table is to define those objectives that form part of the project, and those which may be assumed to form part of the objectives, but that fall outside of the scope for various reasons. The responsibilities of items falling outside of scope are not defined.

Within Project Scope	Responsible Party/s	Outside of Project Scope
Project Management	FE Technologies, Library	Functionality of ILS
Shipping and delivery of RFID equipment	FE Technologies	Functionality of previous vendor’s AMH equipment
Installation of AMH Equipment	FE Technologies	Architectural or major building modifications
Software integration with ILS	FE Technologies, Library	
Testing and acceptance	FE Technologies, Library	
Training	FE Technologies	
“Go Live” and launch	FE Technologies, Library	
Ongoing support and maintenance	FE Technologies	

### ***Minimizing Risk and Maximizing Acceptance***

On the first day a library goes live with AMH the library wants to maximize the acceptance of the new technology by both the library staff and the patrons. To minimize any last-minute changes to the system that cause stress and detract from maximizing the first day's experience FE Technologies provide two services during the installation process:

a) **Pre-Install Staging at FE Technologies**

The AMH solution is extensively tested a week before the go live date. This allows FE Technologies to test all the different components to find weaknesses in the system and business processes. It also allows the SIP2 to be set up ahead of time and to ensure any 'unfriendly' message from the ILS can either be corrected at the ILS or on the translation tables

b) **Placing an AMH Hardware Engineer on standby on Go Live Date**

In the event of there being any last-minute changes that were missed during the testing period we place an AMH Hardware Engineer member either onsite or on standby remotely (with remote visibility to the AMH system via live webcam feed) that allows us to make any changes as fast as possible to ensure the go live is a good experience.

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## Training

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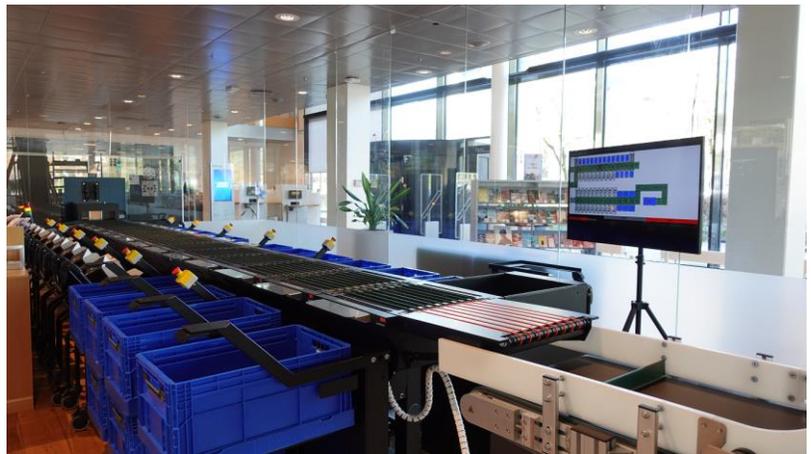
**Please describe Library staff training offered by the Vendor. Please include whether the training is virtual or on-site. Describe all documentation and how it is accessible to Library staff.**

### Training Summary

The FE Technologies trainer will conduct staff training sessions in group sizes that are convenient for the library, ensuring adequate staff coverage in other areas. If needed, training can be tailored to a “train the trainer” format, equipping key staff to train others.

We offer onsite, remote, or a combination of both training options, depending on the library’s requirements.

Detailed and easy to follow training manuals are provided for each product. These manuals are available for download in PDF format via our Support Portal. They include informative diagrams, screenshots, and photos, designed to help staff refer to them as needed when working with the new equipment.



Training is conducted after hardware installation using “live” equipment, providing staff with a real understanding of each product’s functions. This hands-on training is designed for staff at all levels and can also be interesting for non-library stakeholders who want an overview of the products. Staff will have the opportunity to use all equipment and explore various functions.

Change management is crucial for gaining staff buy-in on the new products. Questions are always encouraged, and the sessions are designed to be open, friendly, and unthreatening.

Two levels of training are conducted:

**Basic Sorter and Returns Equipment Training** – this session shows staff the basic functions of the AMH and its components and equips them with basic troubleshooting skills, and demonstrates maintenance requirements, safe handling of the bins and totes, the use of safety features such as the emergency stops, and how the alerts system functions, including bins full alerts so that staff at all levels can maintain the sorter when required.

**Technical Training and Sorting matrix** – This training is aimed at IT/technical staff and/or Managerial staff and deals with the software of the sorter, how to change the sort matrix and associated bin destinations and afterhours rules. The training also covers the available reports, alerts, error messages, and other configuration settings such as the provision of customer receipts and hold slips. This session also covers the training on the web-based Sorter Controller software which can be accessed from any mobile device.



FE Technologies is also on-hand after installation for assistance with all details of the software and in most instances can remote into the equipment to assist with any questions or problems.

# Pricing

Please provide detailed pricing for the removal of current AMH and the design, manufacture, delivery, and installation of the proposed solution. This should include shipping charges, training fees, and any other nonrecurring costs. Pricing plans should include purchase and leasing options for the required hardware. Pricing plans should include maintenance options. Guarantees and warranties should be stated in writing and submitted as part of the proposal. The Vendor shall warrant that the system will meet the reliability and performance requirements set forth in the proposal and will continue to do so if the system remains under vendor maintenance.

Option 1				
Component Group	Cost	Delivery	Install	Support
Sorter Tables, Staff Induction, 9 Spring Bins, Conveyors	\$ 68,222.00	\$ 2,600.00	\$ 3,110.00	\$ 6,140.00
Destacker	\$ 17,720.00	\$ 1,087.00	\$ 869.00	\$ 1,595.00
Extra Spring Bin	\$ 1,185.00	\$ 111.00	\$ 83.00	\$ 107.00
Extra Spring Bin	\$ 1,185.00	\$ 111.00	\$ 83.00	\$ 107.00
Extra Spring Bin	\$ 1,185.00	\$ 111.00	\$ 83.00	\$ 107.00
Internal Induction	\$ 1,758.00	\$ 50.00	\$ 400.00	\$ 155.00
Internal Induction	\$ 1,758.00	\$ 50.00	\$ 400.00	\$ 155.00
Drive Up Induction	\$ 1,435.00	\$ 120.00	\$ 400.00	\$ 129.00
<b>TOTAL</b>	<b>\$ 94,448.00</b>	<b>\$ 4,240.00</b>	<b>\$ 5,428.00</b>	<b>\$ 8,495.00</b>
Option 2				
Component Group	Cost	Delivery	Install	Support
Sorter Tables, Singulator, 8 Spring Bins, Conveyors	\$ 161,715.00	\$ 3,900.00	\$ 6,100.00	\$ 14,554.00
Extra Buffer for Singulator	\$ 16,720.00	\$ 1,087.00	\$ 869.00	\$ 1,505.00
Staff Inlet Height Adjustable L1000mm, with 22" monito	\$ 14,428.00	\$ 942.00	\$ 869.00	\$ 1,299.00
Internal Induction	\$ 1,758.00	\$ 50.00	\$ 400.00	\$ 155.00
Internal Induction	\$ 1,758.00	\$ 50.00	\$ 400.00	\$ 155.00
Drive Up Induction	\$ 1,435.00	\$ 120.00	\$ 400.00	\$ 129.00
<b>TOTAL</b>	<b>\$ 197,814.00</b>	<b>\$ 6,149.00</b>	<b>\$ 9,038.00</b>	<b>\$ 17,797.00</b>
Option 3				
Component Group	Cost	Delivery	Install	Support
Sorter Tables, Singulator, 8 Spring Bins, Conveyors	\$ 161,715.00	\$ 3,900.00	\$ 6,100.00	\$ 14,554.00
Staff Inlet Height Adjustable L1000mm, with 22" monito	\$ 14,428.00	\$ 942.00	\$ 869.00	\$ 1,299.00
Internal Induction	\$ 1,758.00	\$ 50.00	\$ 400.00	\$ 155.00
Internal Induction	\$ 1,758.00	\$ 50.00	\$ 400.00	\$ 155.00
Drive Up Induction	\$ 1,435.00	\$ 120.00	\$ 400.00	\$ 129.00
<b>TOTAL</b>	<b>\$ 181,094.00</b>	<b>\$ 5,062.00</b>	<b>\$ 8,169.00</b>	<b>\$ 16,292.00</b>
Add on Price from :				
		<b>Spring Bin</b>		
		Box Stacker with Dolly	Cost	Delivery
		Spring Bin	\$ 4,022.00	\$ 193.00
		White Stacking Cart plus charger	\$ -	\$ -
		AMH Bin Automatic B650E60 plus Charger	\$ 3,255.00	\$ 193.00
		Box Stand (Tote Shelf)	\$ 3,410.00	\$ 218.00
			\$ 288.00	\$ 25.00
			\$ -	\$ 72.00
			\$ -	\$ -
			\$ -	\$ 362.00
			\$ -	\$ -
			\$ 293.00	\$ -
			\$ 307.00	\$ -
			\$ 26.00	\$ -

Additional \$2500 for removal of current system.

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## Financial Information

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**Demonstration of the financial strength and stability of the Vendor. State if the Vendor is presently negotiating a sale, acquisition, or merger that would alter the Vendors existing structure. Any other information that demonstrates the Vendors experience, ability, and capacity to produce the required outcomes in the RFP.**

FE Technologies has been experiencing robust growth and consistent success in the library sector. Since entering the US market, our innovative and cost-effective RFID solutions have garnered significant interest, making us the fastest-growing library RFID supplier with over 2,600 installations to date. In just a few months, we have secured nearly a dozen contracts of various sizes in the US. Our financial health is strong, and we continue to expand into new geographical markets. We maintain a constantly evolving development pipeline and a list of new products. Our audited financial statements are available upon request.

FE Technologies is not currently in the process of or negotiating a sale, acquisition, or merger.

---

## Parts Availability

---

**To ensure ready availability of components, parts, and supplies, all major elements of the system must be warehoused in the U.S.A., or the Vendor must demonstrate the ability to have parts available within 24 hours of request.**

Parts are stored in our Texas warehouse, and we partner with Shyft Global for parts replacement and swap-out. Shyft, a Fortune 100 company, has extensive technical support resources and credentials. Their local technicians are factory-trained and certified on FE Technologies products. Shyft has offices nationwide and adheres to our service level agreements with all customers.

If a hardware problem is identified, FE Technologies will dispatch the necessary parts to the library. The cost of these replacement parts is covered under our Warranty and Support Agreement. A technician will be onsite within 24 hours of the library confirming receipt of the parts.



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## Maintenance and Support

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**APL prefers that Vendor support be available during most Library open hours with a response time of four hours or less for critical hardware and software issues. APL prefers to contact Vendors via telephone or web/email-based ticketing system for support requests. Please describe ongoing maintenance and support offered by the Vendor, including availability of telephone or web/email-based support and support response times. Describe any preventative maintenance plans for the proposed solution that the Vendor recommends including recommended APL staff cleaning and maintenance tasks.**

For library staff, we try to keep it simple. With each sorter, we supply a simple to use wand vacuum for staff to use for weekly cleaning of the sensors and that is where the library's job ends when it comes to preventative maintenance.

FE Technologies also schedules two preventative maintenance visits by our technicians each year. During these visits, a technician will do some further cleaning and testing to make sure that the sorter is in optimum condition.

FE Technologies offers two methods for logging support tickets:

1. Online via our web portal.
2. Through our dedicated toll-free call center.

Libraries can track their tickets through the online portal, giving them control and visibility over the status of their RFID equipment. Tickets logged online will be acknowledged within 1 hour, with a Support Technician either updating the ticket or contacting the customer directly.

### Remote Access

If the problem cannot be resolved via telephone, the Support Technician may need to access your FE Technologies RFID equipment via remote access. This is performed via a Team Viewer, or a Citrix token-based system, or we can perform this via any remote access system that the library prefers.

### Onsite support

Our Technical Support Officers, who are highly trained and experienced employees of FE Technologies, work closely with our Research and Development Team. Based in Texas, they are well-equipped to handle any issues. If a hardware problem is identified, FE Technologies will dispatch the necessary parts to the library. The cost of these replacement parts is covered under our Warranty and Support Agreement. A technician will be onsite within 24 hours of the library confirming receipt of the parts.

Parts are stored in our Texas warehouse, and we partner with Shyft Global for parts replacement and swap-out. Shyft, a Fortune 100 company, has extensive technical support resources and credentials.

Their local technicians are factory-trained and certified on FE Technologies products. Shyft has offices nationwide and adheres to our service level agreements with all customers.

### Support Portal

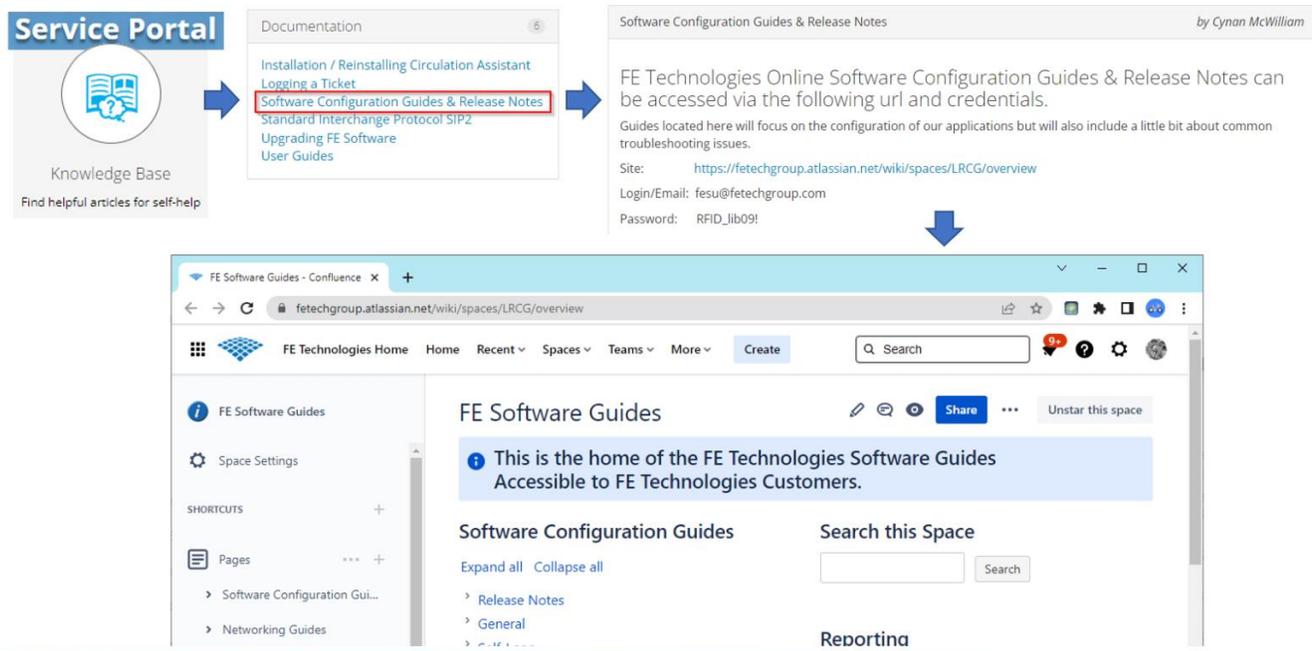
You can log support tickets via telephone, email, or our Support Portal. The portal provides access to a knowledge base with User Guides, quick fix tips, FAQs, and common queries. It features tiered access: Managers can view all branches, while staff can only view their own.

Email updates on your Work Ticket progress include a link to the portal, allowing you to stay informed and add comments if needed.

Our Online Portal offers:

- Tiered access for lodging tickets: Administrators see all branches; staff see their own.
- Problem severity classification.
- File uploads (screenshots, reports, images).
- Knowledge base with User Guides, issue resolution tips, and common issues.

Refer to the screenshot below:



### Reporting, Escalation and Customer Satisfaction

FE Technologies provides daily reports to all staff on current open work tickets, ensuring we stay informed about outstanding issues and affected customers. If there's a risk of not meeting our service level agreement, the Operations Manager can allocate additional staff resources. During busy times,

our Research and Development Team often assists due to their unparalleled expertise with our software.

We have a defined escalation path, allowing you to contact your Account Manager or the Operations Manager if a problem isn't resolved to your satisfaction. This process is audited for quality control.

Libraries can also monitor their work tickets by logging into the portal, where they can view open tickets, their status, and a history of closed tickets. See below:

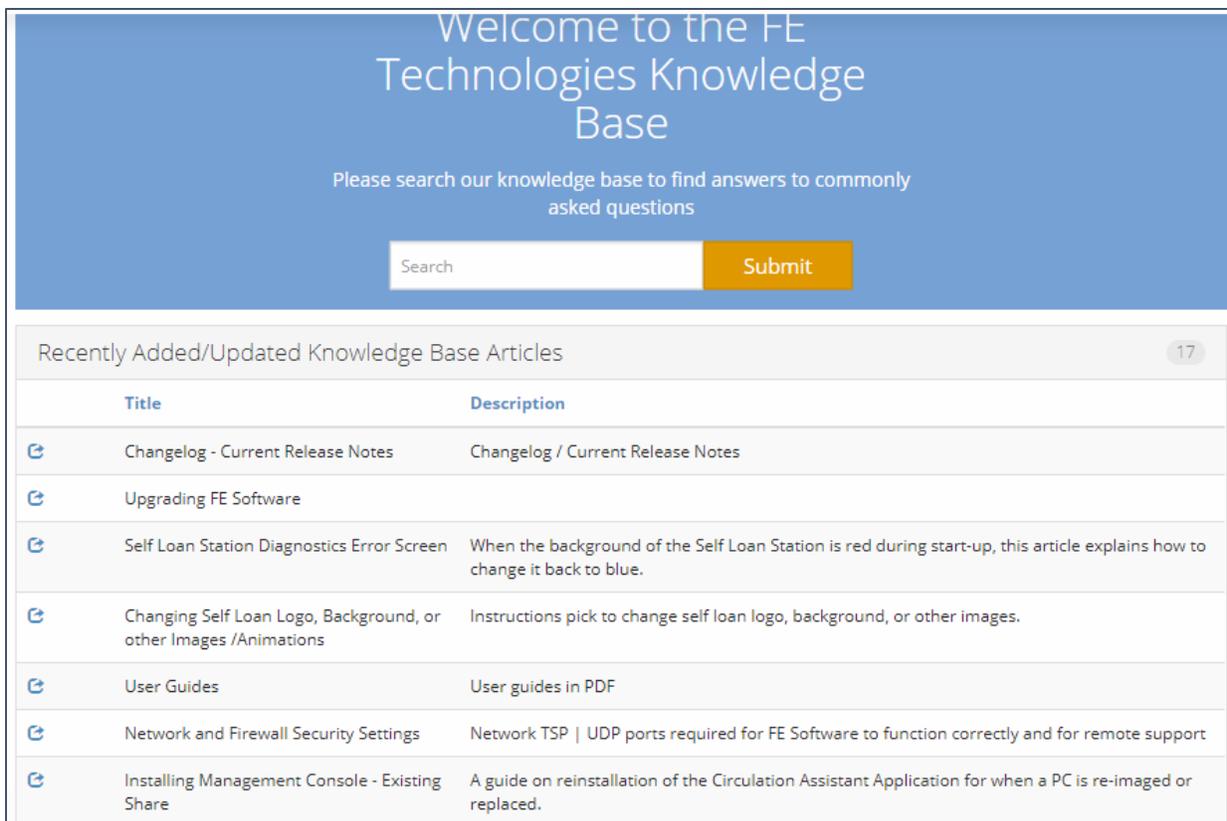
Open Tickets <span style="float: right;">3</span>				
Record ID	Location	Summary	Status	Last Modified
<a href="#">T22201</a>	FETECH	Survey Test Ticket	In Progress	7/24/2019 8:00 AM
<a href="#">T21308</a>	FETECH	Test Ticket for Reporting	On Hold - Waiting on Client	5/10/2019 5:02 AM
<a href="#">T20844</a>	FETECH	Tagging Trolley	In Progress - Parts in Transit	5/1/2019 9:46 AM

« < 1 > »

Waiting Confirmation / Recently Closed <span style="float: right;">33</span>
<a href="#">T22174 INSTALLATION - TAGGING TROLLEY</a>
<a href="#">T22371 Hard drive US-spares</a>
<a href="#">T21766 Trolleys not holding charge</a>
<a href="#">T22192 INSTALLATION - TAGGING TROLLEY</a>
<a href="#">T22072 Northern Beaches   Tag Encoding issue Warri...</a>
<a href="#">T21696 Lake Macquarie Demo Equipment</a>
<a href="#">T22007 MSU wand issue with rental unit</a>
<a href="#">T21968 TAGGING TROLLEY   Northern Beaches Glen S...</a>
<a href="#">T21451 Test</a>
<a href="#">T21142 MR102 dead on arrival</a>
<a href="#">T21740 Survey Test</a>
<a href="#">T21420 Test - Closed Waiting for Parts Status</a>
<a href="#">T21477 Test Ticket</a>
<a href="#">T21499 Attendees List Of American Library Associatio...</a>
<a href="#">T21336 Task Test Ticket</a>
<a href="#">T21412 Sunraysia Institute trolley set up</a>
<a href="#">T21405 RE: ALA 2019 - Attendees Info</a>

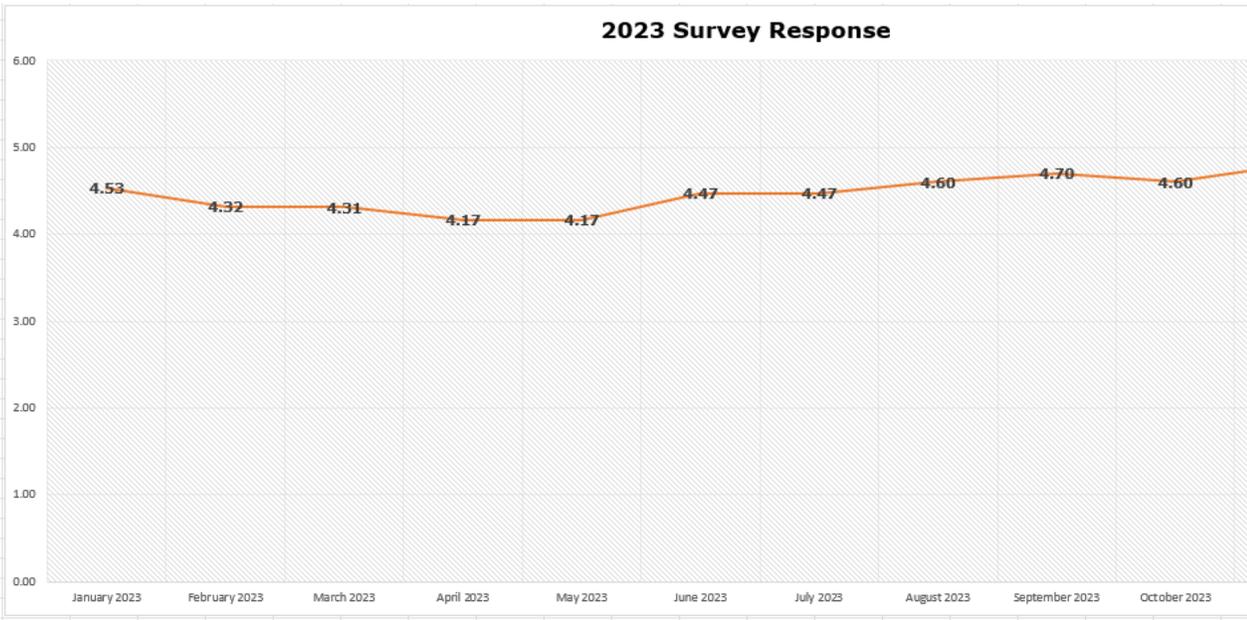
The Support Portal also services as a knowledge base for libraries, where User Guides and other useful documentation can be downloaded, free of charge. There are instructions for commonly performed software actions, along with diagrams and general SIP information. See below:

Ongoing we produce a weekly report of the results of our Customer Satisfaction Surveys, which all staff have access to, and positive results are a great source of pride for our whole organization. Our survey results from 2023 are as follows with 1 being poor and 5 being excellent:



Search

Recently Added/Updated Knowledge Base Articles <span>17</span>	
Title	Description
<a href="#">Changelog - Current Release Notes</a>	Changelog / Current Release Notes
<a href="#">Upgrading FE Software</a>	
<a href="#">Self Loan Station Diagnostics Error Screen</a>	When the background of the Self Loan Station is red during start-up, this article explains how to change it back to blue.
<a href="#">Changing Self Loan Logo, Background, or other Images /Animations</a>	Instructions pick to change self loan logo, background, or other images.
<a href="#">User Guides</a>	User guides in PDF
<a href="#">Network and Firewall Security Settings</a>	Network TSP   UDP ports required for FE Software to function correctly and for remote support
<a href="#">Installing Management Console - Existing Share</a>	A guide on reinstallation of the Circulation Assistant Application for when a PC is re-imaged or replaced.



And some recent customer comments on the survey:  
*“FE Tech has performed well above our other vendors in responding to and solving those not-so-easy issues. Thanks!”*  
*“Appreciate you guys, definitely on my favorite vendor list!!”*  
*“Thanks to Dan who spent time on calls with us and accurately diagnosed the problem.”*  
*“Excellent customer service received, and site visits were all attended as scheduled. Thanks!”*

The Management Team investigates any downward trends in response results to identify patterns, such as faulty parts, coverage or staffing issues, or software bugs. They quickly seek and implement resolutions. Survey results are shared company-wide and are a source of pride for all employees, who have a genuine vested interest in customer satisfaction. The Management Team is immediately notified of any negative responses, allowing them to promptly and personally address persistent customer issues.

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## Warranty and Service Requirements

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**APL expects to call one toll-free telephone number to obtain all support including software and hardware service for all elements of the system and all transaction assistance with the payment systems.**

Comply. FE Technologies' support number is a toll-free number.

**Does the Vendor directly provide all hardware and software support for all items proposed? If not, who provides the service?**

FE Technologies' own Technical Support team is based in Texas and responds to work tickets within 1 hour. The Team resolves 95% of Work Tickets via telephone and remote access.



If an onsite visit is needed for a repair or part replacement, we partner with Shyft Global Services to send a skilled technician to your location. This ensures seamless parts replacement, minimizing downtime and maintaining the smooth operation of your library security solutions. There are 5 Shyft technicians located in Chicago area)

**How many full-time support technicians are available in the Midwest (US)?**

FE Technologies employs 8 Technical Support Officers and we are supported in the Midwest for part replacement by Shyft, as described above.

**The Vendor must provide an all-inclusive 12-month extended warranty on equipment, software, and components. A maintenance / service contract must be offered and are subject to negotiation by the Library.**

FE Technologies provides a comprehensive warranty against defects in materials and workmanship for all FE Technologies Library RFID equipment. Should any equipment supplied as part of the Library RFID system develop a fault, FE Technologies or its contracted field service agent/s will repair or replace the equipment via remote access or onsite visit. The standard warranty period is for 12 months from the commencement date. There is no cost for the standard warranty. Extended warranty for the equipment is available for a period of 4 years following the standard warranty period (total warranty period being 5 years). For detailed information, please refer to Attachment A: Warranty and Support Agreement.

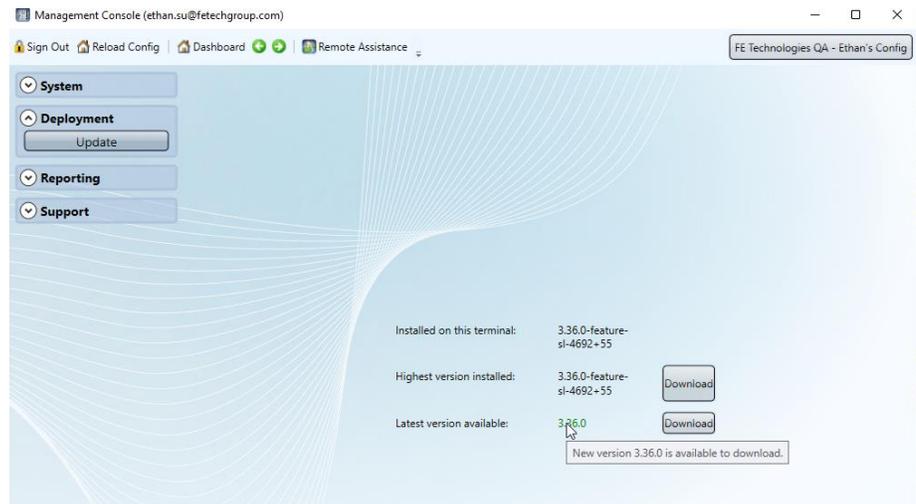
**The Vendor must offer a 12-month 100% money-back performance guarantee on all equipment purchased and covered by a 12-month extended warranty or service agreement.**

Our solution complies with this requirement. For detailed information, please refer to Attachment A: Warranty and Support Agreement.

**Software patches and service pack releases must be supplied at no additional charge to the Library while under maintenance.**

Our development cycle is based on Agile Systems – it is a continuous cycle of improvement that relies on customer feedback and ideas, as well as quality assurance testing in the lab and onsite. We perform monthly “sprints” which included software improvements, and we release a new software version every 6-8 weeks. This is provided to all our customers on the Warranty and Support Agreement free of charge. Version releases may contain a combination of new features, new products, bug fixes and enhancements. The release notes are published via our Technical Support Portal Website and are also available free of charge directly from FE Technologies.

Libraries can choose to upgrade to a new version release at any stage. New versions can be downloaded via the Management Console and either rolled out immediately or scheduled for roll out later/date. Rollouts can be limited to one, some or all the installed equipment. The Management Console has a feature that shows which version is running on each terminal and gives the option to download the latest version.



Note that upgrades are not compulsory, and FE Technologies supports all software version releases for a period of at least 2 years.

**Feature updates and new software versions must be included at no additional charge while under maintenance.**

All software updates and new features, enhancements, bug fixes etc are included as part of our maintenance

**Service technicians must be fully trained, factory authorized, and certified by the manufacturer to perform service on the machine.**

Our solution complies with this requirement.

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## References

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**Vendors shall submit a list of at least three references for whom they have done work similar to that described in the scope of this RFP. Information provided for each client must include the following:**

**Clients name   Brief explanation of what the contract covered   Size of the library   Contact person   Title   Address   Phone number   E-mail address**

FE Technologies is delighted to present the following customers as references for AMH installations:

**Siouxland Libraries**

200 N Dakota Ave, Sioux Falls SD 57104

Alysia Boysen | Senior Librarian for Technology

alysia.boysen@siouxfalls.gov

605.367.8702

ILS Polaris, multi-branch system with a circulation of 2 million. Products: 5 AMHS, Security Gates, Self-Checkouts, Circ Assistants, Sort Assistants and Live Scanning Wands

**Greenfield Public Library**

5310 W Layton Ave, Greenfield, WI 53220

Jennifer Einwalter | Library Director

jennifer.einwalter@greenfieldwi.us

(414) 321-9595 ext. 4103

ILS Sierra, part of the Milwaukee Federated Library System with a circulation of 300,600. Products: AMH, Security Gates, Circ Assistant, Sort Assistant

**Rockford Public Library**

215 N Wyman St, Rockford, IL 61101

Anthony Cortez | Director of Finance and IT

acortez@rockfordpubliclibrary.org

(815) 987-6612

ILS Symphony, multi-branch system with a circulation of 1.5 million. Products: 2 AMHS, Self Checkouts, Circ Assistants, Sort Assistants, Security Gates, Check In Bin

And in relation to the Check-in Bin, Live Scanning Wand and Sort Assistant products:

**Glenview Public Library**

1930 Glenview Rd, Glenview, IL 60025

Karen Kee | Material Services Director

kkee@glenviewpl.org

847.901.5932

ILS Polaris, part of Cooperative Computer Services with a circulation of 870,000. Products: Circ Assistants, Sort Assistant, Security Gates, Live Scanning Wand, Self-Checkouts, Tags, RFID Conversion

**Winnetka-Northfield Public Library District**

768 Oak St, Winnetka, IL 60093

Courtney Volny | Customer Relations Manager

cvolny@wnpld.org

(847) 446-7220 ex. 5251

ILS Polaris, 2 branch system with a circulation of 410,000. Products: Self-Checkouts, Check-in Bin, Live Scanning Wand and Sort Assistant

835 Hale Ave. N  
Oakdale, MN 55128  
(651) 747-0492  
[www.tech-logic.com](http://www.tech-logic.com)



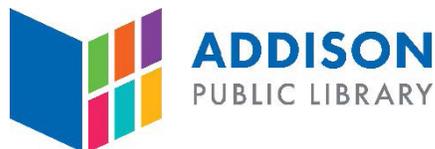
**Tech Logic**  
— *People First* —

# Addison Public Library

## Response to RFP:

Automated Materials Handling (AMH)  
System and Related Installation, Training,  
and Support Services

## Prepared For:



## Tech logic Contact:

Mike Heitzman

Senior Solution Specialist, Tech Logic

[bids@tech-logic.com](mailto:bids@tech-logic.com) | [mheitzman@tech-logic.com](mailto:mheitzman@tech-logic.com) | (651) 208-9504



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To Brook Sievers and the team at Addison Public Library:

Thank you for the opportunity to respond to this RFP regarding Addison Public Library's automated materials handling system. We would be happy to partner with Addison Public Library (APL) by providing a new automated materials handling solution to help streamline your circulation workflow.

Tech Logic Corporation is committed to APL's ongoing success with our totalAMH, and our 27 years of experience and insight into library RFID workflow are at your disposal for the long term. Our solutions are custom-built and transform library circulation workflows for both staff and patrons.

Our proposed AMH solution is based on simple, bulk induction and stacked-item separation workflows. In our response, we will further clarify our philosophy of "total AMH", which is grounded in the belief that the machine should bear the responsibility of both check-in and sorting, rather than relying on staff members to check-in items one at a time at a dedicated staff station or patrons to check in one-at-a-time at a drop. Our system allows patrons to quickly return their materials without waiting in line, and staff can induct multiple items at a time without manually checking each item in. Our drive-up drop features an extension for easier patron access.

We would welcome the opportunity to continue this conversation with you and ultimately partner with you on your mission to empower your library and your community. You may have noticed that most of the other companies in this market are foreign-owned, are part of a "portfolio" of technology holdings controlled by investment firms, or are components of complicated international conglomerates that have very little relationship (relatively speaking) to libraries here in the US. In contrast—Tech Logic designs, builds, and services our AMH systems out of our headquarters in Oakdale, Minnesota. We intentionally keep our AMH manufacturing and product support headquarters in Minnesota in order to protect the quality of our AMH systems and service.

If you would like to discuss or negotiate any element of this proposal, please let us know. We are eager to work with you and establish a long-term partnership. Mike Heitzman, Tech Logic's Senior Solution Specialist, is excited to work closely with Addison Public Library. He has a wealth of knowledge and experience, having worked directly with libraries around the world since 2001.

Thank you again for this opportunity. If you have any questions at all regarding Tech Logic's proposed solutions or services—or you just want to talk about RFID strategy—please contact us using the information shown below. We are very happy to assist.

Gary Kirk, President, Tech Logic  
bids@tech-logic.com  
gkirk@tech-logic.com  
(404) 451-8530

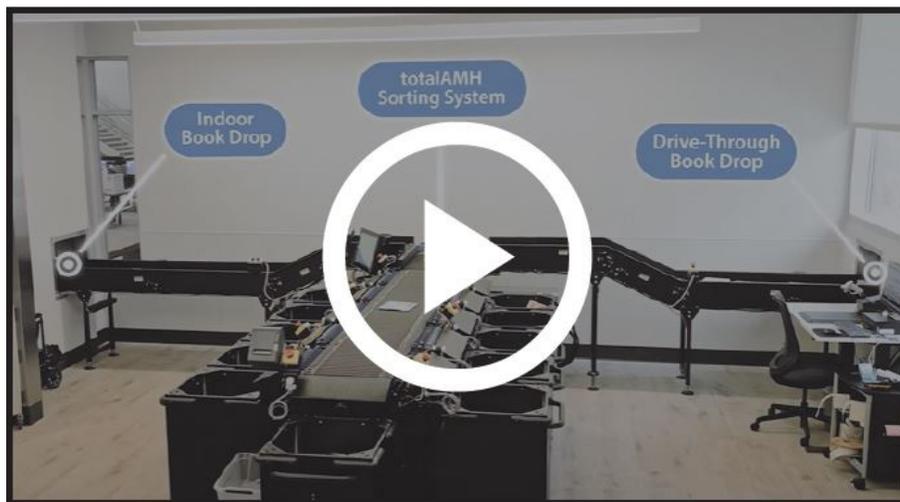
Mike Heitzman, Sr. Solutions Specialist, Tech Logic  
bids@tech-logic.com  
mheitzman@tech-logic.com  
(843) 870-8326



# Executive Summary

As an RFID workflow specialist working exclusively with libraries for over 25 years, Tech Logic will ensure that APL gains a powerful and permanent return on your investment. Our proposed AMH solution is based on simple, bulk induction and stacked-item separation workflows. Throughout this proposal, we detail why Tech Logic will implement true automation for the benefit of APL's staff and patrons.

We believe that the AMH machine should bear the responsibility of both check-in and sorting, rather than relying on staff members to check-in items one at a time at a dedicated staff station or patrons to check in one-at-a-time at a drop. Our system allows patrons to quickly return their materials without waiting in line, and staff can induct multiple items at a time without manually checking each item in. Our drive-up drop features an extension for easier patron access.



*This video showcases how Tech Logic's proven totalAMH design empowers staff and patrons with true automation at Round Rock Public Library (TX).*

With Tech Logic's totalAMH system, patrons and staff simply place handful-sized stacks of items into the system and then walk away. No manual check-in or singular-item processing is required. Immediately after handful-sized stacks of materials are returned by patrons or inducted by staff, the totalAMH system gently separates stacked items using an inclined and treaded belt and software-automated variance in belt speed. Then, the totalAMH system uses RFID technology that is built into the conveyance—as well as real-time connection to the library's ILS via SIP2—to identify items, update ILS data, print hold slips (if applicable), and sort the materials into corresponding bins—all based on the library's settings and sorting strategy.

We recognize APL's request for an adjustable staff station, however, we feel a more efficient workflow would be to let the machine determine if the item is unable to be checked in (barcode vs RFID). An item that is not able to be read is subsequently routed to the exceptions bin to be addressed by staff.



# Vendor Information

**Form of ownership:** Corporation

**The number of years the Vendor has been in business under its current name.**

We have operated as Tech Logic Corporation since our founding in 1997.

**Corporations shall provide a Certificate of Good Standing from the Secretary of State, or equivalent documentation, showing the company is fully compliant with its filing requirements and is in good standing with the state in which it is incorporated.**

Please find our certificate on page 45.

**Describe the length and nature of the Vendor's experience in providing the products and services requested in this RFP.**

Bob Rolfe (former director of the Hennepin County Library in Minnesota) co-founded Tech Logic in 1997 intending to reduce staff injury rates by automating the return and sorting process while maintaining a simple and seamless patron return experience. Under his leadership, we produced North America's first library-specific automated materials handling (AMH) system. To this day, our success is tied directly to the success of our library partners and with the library industry as a whole. Because Tech Logic works exclusively with libraries, we can fully commit to customizing each library's solution to fit their specific needs and goals. As the pioneer in library materials handling, Tech Logic has developed specifications and set standards for RFID and materials handling technology, including industry standards for vertical conveyance, high-efficiency multi-item book drops, staff induction, RFID processing, and AMH performance.

We want to note that interface-free induction of multi-item stacks, automatic separation of stacked items, and other automated workflows have been standard on our AMH systems for over 25 years. We know how to reliably and automatically separate items, so patrons and staff don't have to. We would encourage APL to contrast this with our competitors, who have only recently shifted from their one-at-a-time manual workflow using unproven systems.

The Tech Logic team designs, manufactures, and tests all of our AMH systems at our headquarters in Oakdale, MN. To ensure quality, we're devoted to keeping our entire manufacturing process at our Minnesota facility. This has been the case since our founding in 1997. Our systems are built to last and enjoy proactive servicing because of our first-year warranty and subsequent years' dedicated preventative maintenance and support. Rather than announcing an "end of life" for any of our totalAMH systems, we work very closely throughout each year with our libraries to keep totalAMH systems operational and up-to-date year after year. Typical totalAMH lifespans often exceed 15 years. Quality hardware components are our standard, and all of our totalAMH systems are built with an embedded industrial PC (front-panel rating of IP65) running Windows Enterprise LTSC for optimal long-term stability.

Our AMH customers have accomplished amazing things with their totalAMH systems! We've included example stories within this proposal, beginning on page 59.



**Names of all partners or investors and how long each has been in existence.**

In 2005, The Library Corporation (TLC) acquired Tech Logic. TLC has been a US-based and family-owned company (certified WBE) since its founding in 1974. For 50 years, TLC has provided solutions for all kinds of libraries—from single sites to the largest systems in the world.



*This video from ALA 2023 showcases the kind of collaboration we enjoy with our parent company, The Library Corporation (TLC)!*



# Response to Specifications

## Description of Proposed Solution

The proposed solution must include the following:

**Internal, book-drop style patron induction with sufficient aperture to accept most oversized books. The induction should not have a screen or receipt printer. The induction needs to accept multiple items at once.**

Yes. With Tech Logic's totalAMH system, each patron simply places handful-sized stacks of items into the system and then walks away. No manual check-in or singular-item processing is required.

Immediately after handful-sized stacks of materials are returned by patrons, the totalAMH system gently separates stacked items using an inclined and treaded belt and software-automated variance in belt speed. Then, the totalAMH system uses RFID technology that is built into the conveyance—as well as real-time connection to the library's ILS via SIP2—to identify items, update ILS data, print hold slips (if applicable), and sort the materials into corresponding bins—all based on the library's settings and sorting strategy.

**External, book-drop style patron induction with sufficient aperture to accept most oversized books. The induction should not have a screen or receipt printer. The induction needs to accept multiple items at once and function during inclement weather (e.g., rain, snow, ice, wind).**

Yes. The external induction point has a motion-activated upward-sliding door to protect the item return when not in use. Our returns use photoeyes to detect the presence of item(s) ready to induct and, upon detection, the return door will slide upward and the conveyance will begin to move. Exterior book drops include a speaker that, when a patron is detected, relays instructions based on system status, which the library can customize and configure. Patrons simply place handful-sized stacks of items into the return, and then walk away. No manual check-in or singular-item processing is required. Our drive-up drop also features an extension for easier patron access.

**A height-adjustable staff induction with a barcode scanner and RFID reader.**

With totalAMH, staff members place items on the staff induction conveyance and then walk away—letting the AMH system separate, check in, and sort items. We base our totalAMH system design on the belief that staff members should not have to check items in manually, processing each item one-at-a-time using an interface. For hold and transit slips, our system prints slips at a designated hold/transit bin so that staff can insert hold and transit slips at their convenience after the system separates, checks in, and sorts the items. We think this is more efficient than staff members frequently having to interrupt an already manual, one-at-a-time check-in process to insert hold and transit slips during induction.

In the case of SWAN member library items that are barcode only, the machine will determine that the item needs to be scanned by staff and will simply route to the exceptions bin.



**Description of bin system based on the recommendation of the Vendor. Include options for 7 and 9 bins. Include options for spring-loaded bins and bins that use electric power to raise the bin floor.**

Yes, Tech Logic is proposing four options for APL to consider: a 7-bin system with easyBINS, a 7-bin system with smartBINS, a 9-bin system with easyBINS, and a 9-bin system with smartBINS. For drawings of these proposed systems, please see pages 17-22. For pricing, please see pages 36-40.

Tech Logic's AMH systems work with various sorting containers—even those that aren't provided by Tech Logic. For APL, we recommend either our easyBIN (page 13) or our smartBIN (page 15).

**Allows staff to choose between two or more sorting strategies depending on need.**

Yes. The totalAMH system uses customizable sorting profiles to implement the library's sorting strategies. Sorting profiles are configured using ILS data/directives such as holds, transits, transit holds, collection code, call number, set information, and more. Libraries can create their own sort profiles and can also switch between them through a drop-down menu in order to adjust to changing strategies and tasks. The system can memorize up to 99 sort profiles at any given time!

**Ability to send notifications via email when the AMH is not functioning as expected or a bin is full.**

Yes. The library can configure email notifications for any or all of the following events: belt jams; full bins; SIP connection issue (after a configurable number of retries); induction issue.

The totalAMH system includes a comprehensive monitoring and management interface at the AMH location (or accessible remotely via Remote Desktop Login or another remote connection software in use by the library) from which users can access system performance statistics, monitor the status and real-time activity of each section of conveyance, see when bins are full, conduct troubleshooting, and make configurations based on library operations and sorting strategy.

**System provided transaction logs and detailed statistics reporting.**

Yes. The totalAMH system provides a system log report, transaction log, and exceptions log. The library can assess these statistics based on sort location to see which bins are filling up fastest. Statistical information is stored locally to the totalAMH PC, but can also be stored centrally using a network location. Tech Logic's totalAMH statistical reporting can be set up to auto export daily (up to 4 times per day), weekly, or monthly.

**Ability to separate stacked items. Specify the separation accuracy for the proposed layout(s).**

Yes. Immediately after handful-sized stacks of materials are inducted by patrons or staff, the totalAMH system gently separates stacked items using an inclined and treaded belt and software-automated variance in belt speed. Our totalAMH systems and their patron libraries have depended on automatic item stack separation for over 25 years. These experiences show very high levels of separation accuracy. In the rare case that items stick together, the system will detect both items and will still send a check-in message to the ILS for both items before sorting those items to the exceptions bin. Check-in accuracy for standard library items is 99% and check-in accuracy for CDs and DVDs is 97%.



# totalAMH

Automated Material Handling (AMH)  
Designed Exclusively for Libraries since 1997

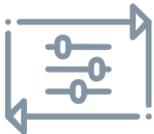


Tech Logic's totalAMH solutions are custom-built automated material handling (AMH) systems that are transforming library circulation workflows for both staff and patrons. Since 1997, Tech Logic's totalAMH designs have been constantly tested, refined, and proven in the library industry. With your new system, you should expect benefits like the following:



## EMPOWER YOUR PEOPLE

With totalAMH, patrons and staff simply induct handful-sized stacks of items into the system and then walk away. Our patron returns and staff induction systems reduce induction time and motion by 50-70% (as compared to a manual one-at-a-time induction workflow).



## STAY FLEXIBLE

Staff can easily monitor totalAMH system operations and make configurations accordingly. For example, staff can create as many different sorting strategies as they need and switch between them on the fly to address various library goals and scenarios.



## AUTOMATE FOR THE LONG TERM

Tech Logic's totalAMH systems are built to last, and our service team is dedicated to protecting your investment. We have been maintaining and supporting AMH systems since 1997. Some of those first systems are still serving their libraries today, having sorted tens of millions of items.



## OUR SYSTEMS ARE COMPLETELY CUSTOMIZABLE

We've installed small three-bin totalAMH systems, as well as 70-bin totalAMH central sorters. We've installed totalAMH systems with customized conveyance and configurations for multi-floor buildings and varying workflows. We would love to hear about your library design and goals. We'll work with you to create a customized totalAMH solution.

### AUTOMATED INDUCTION FOR PATRONS

With totalAMH, patrons simply induct handful-sized stacks of items into the return and then walk away. No tedious manual one-at-a-time scanning is required.

### AUTOMATED INDUCTION FOR STAFF

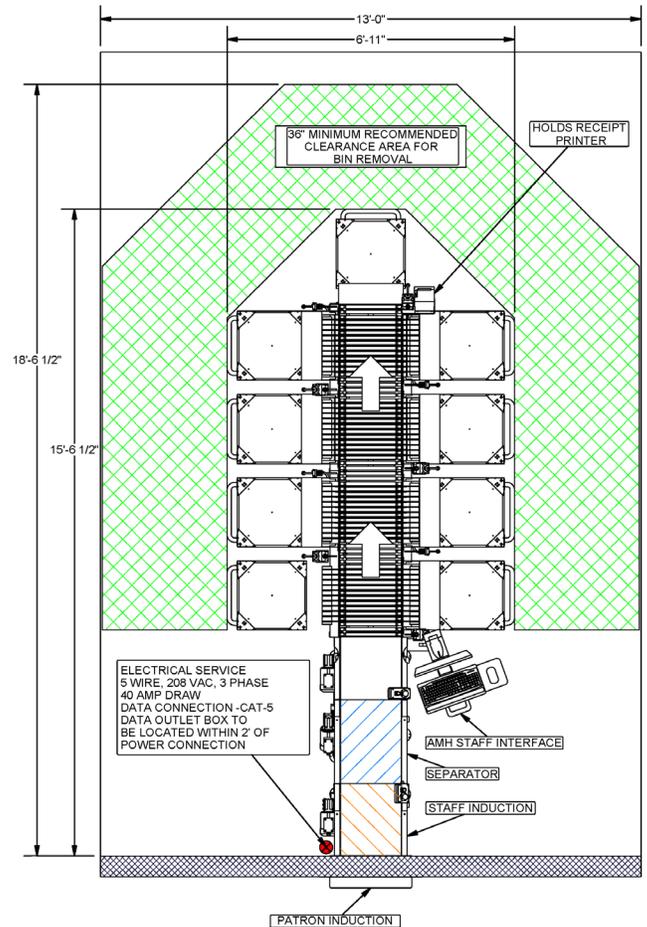
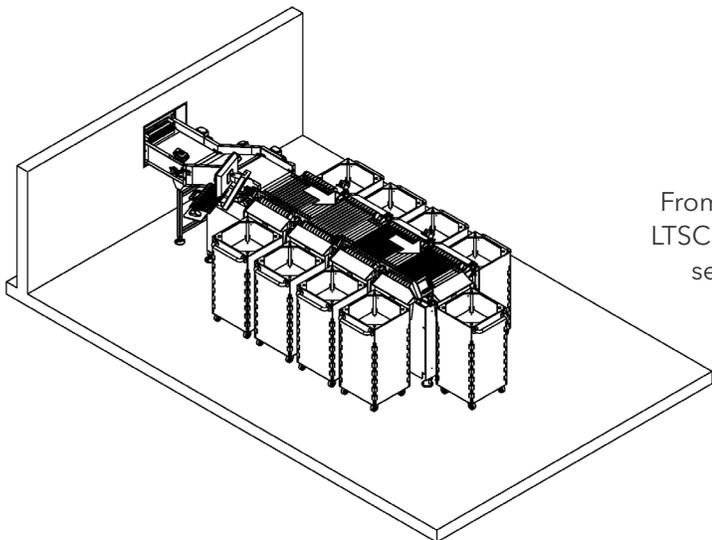
With totalAMH, staff simply induct handful-sized stacks of items onto the staff induction conveyance and then walk away. No tedious manual one-at-a-time scanning is required.

### AUTOMATIC MATERIALS SEPARATION

Unlike competitors, Tech Logic's stack separation design has been proven and refined in hundreds of libraries throughout the last 25+ years.

### AUTOMATIC CHECK-IN AND SORTING

Immediately after separation, totalAMH uses RFID and/or barcode technology to detect, identify, check-in, and sort each item based on connection to the library's circulation system and the library's sorting strategy.



### STREAMLINED CENTRAL MANAGEMENT

From the totalAMH system's central PC (IP65 Win10 Enterprise LTSC) staff can access statistics, monitor each conveyor section, see when containers are full, troubleshoot any errors, create and switch between sort strategies, and more.



## OUR EXCEPTION CONTAINER WORKS FOR YOU

Rather than forcing patrons or staff to interrupt item induction in order to deal with rejected items (e.g. damaged or missing RFID tag) our totalAMH system accepts these items and sorts them into a designated exceptions bin for investigation at a staff member's convenience.



totalAMH systems can work with a mix of various containers depending on the library's desired sorting strategies.

## BARCODE DETECTION (OPTIONAL)

Libraries deploy our totalAMH VISION system (shown below) if some or all of their items only use barcodes. This system detects each item's barcode from above or below the conveyance, no matter the item's orientation, using machine vision technology.



## FLEXIBLE SORTING CONTAINERS

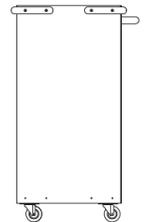
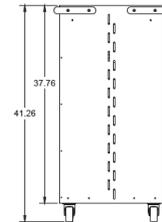
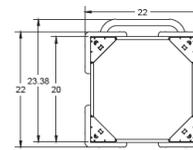
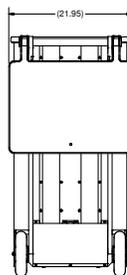
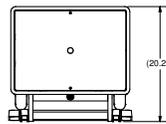
Tech Logic's easyBINS, smartBINS, totes, and tote carts serve as reliable and ergonomic tools to complete the totalAMH workflow.

Our totalAMH systems work with a variety of sorting containers—whether or not the containers are provided by Tech Logic.

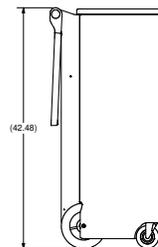
## AUTOMATED CONTAINERS (OPTIONAL)

Tech Logic's automated smartBIN containers (shown below) are designed for the best ergonomic experience. For efficient loading, unloading, and transport, smartBINS use oversized wheels and photo sensors that automatically adjust the bin floor when items are added or removed.

smartBIN dimensions (below)



easyBIN dimensions (above)





### BATCH TRANSIT (OPTIONAL)

Tech Logic's batchTRANSIT system can log a group of sorted items under one container's barcode so that, when that container travels from one destination to another, the container (and the items) are tracked in a database and staff have the option to process all of the items simultaneously with a single scan.

Also, with all of these items tracked within the batchTRANSIT database, staff can easily search for specific containers or items and can also obtain item transit statistics—all from any PC or tablet with access to the library network.

### AUTOMATIC ITEM INDUCTION (OPTIONAL)

Our totalAMH UNLOADER system (shown below) is ideal for high-volume operations, because it gently and automatically unloads full smartBINS onto the totalAMH system without a staff member having to touch any items.



*"Tech Logic was able to provide input during the design process regarding all the different components so the team could arrive at an efficient and effective solution for the Lenexa City Center Library."*

— Project Architect

### CUSTOMIZED CONVEYANCE (OPTIONAL)

Tech Logic's custom conveyance systems, designed specifically for library items, have set the standard in the library industry. Our patented and proven systems gently transport library items around corners, under floors or streets, to or from separate building levels, overhead via ceiling conveyance, and more.

### CALLING ALL LIBRARY DESIGNERS AND PLANNERS

Tech Logic's AMH portfolio is the most flexible in the industry because we prioritize collaboration and customization. It's never too early to connect with us about your automation project.





# easyBIN

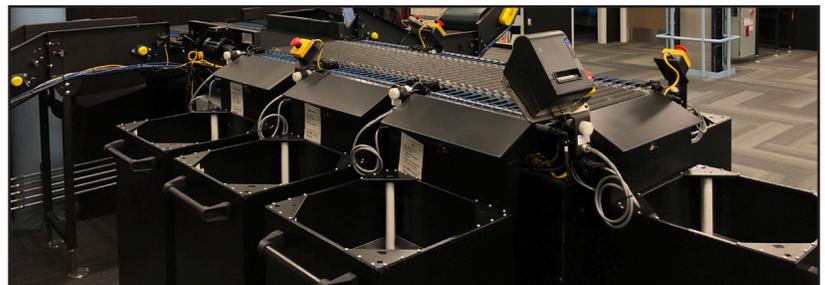
GENTLE, RELIABLE SORTING



Tech Logic's easyBIN, made with galvanized steel, is tough on the outside but gentle on items.

The easyBIN's padded float tray lowers as items are received and rises as items are removed, which keeps items near the top of the bin. This keeps items from falling too far upon induction and also helps to eliminate strain on the user's back and shoulders during retrieval.

Our easyBIN holds between 125 and 150 items (depending on item size) and comes with lockable wheels, ready for versatile use throughout the library's sorting operation.

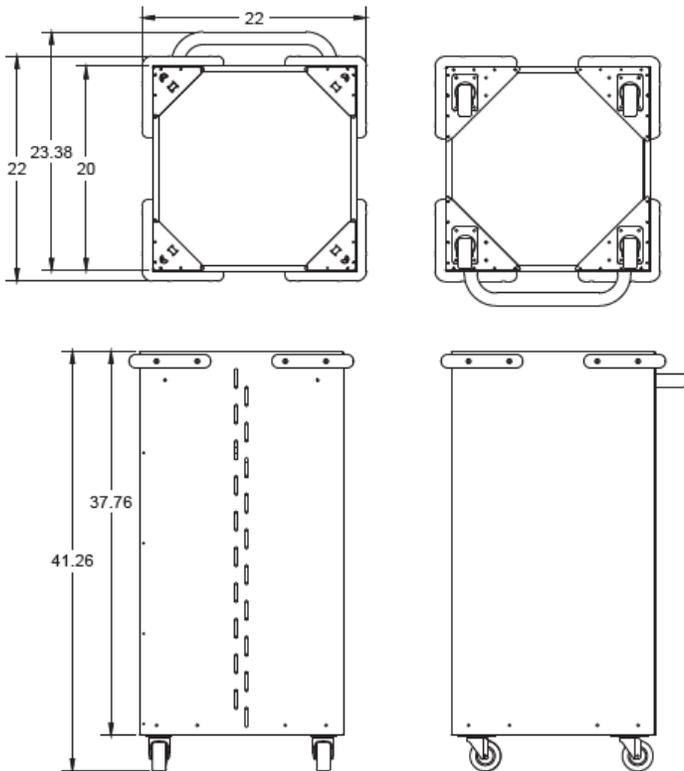
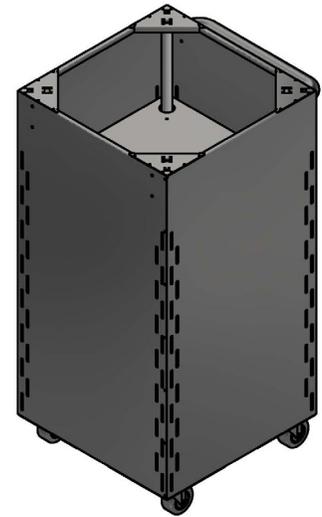


Tech Logic's totalAMH system works with a variety of containers—whether or not the containers are purchased through Tech Logic.



## easyBIN (totalAMH Sorting Container Option)

<b>Dimensions</b>	Please find dimensions, below.
<b>Item Capacity</b>	125-150 Items
<b>Floor Adjustment</b>	Padded, spring-loaded base for gentle loading and ergonomic unloading
<b>Wheels</b>	Four corner-located casters. Two swivellocking casters and two fixed casters. Nonmarring. Plate mounted. Ball bearing
<b>Construction</b>	Galvanized Steel. 14-gauge gusseted base, riveted seams with bottom access





# smartBIN

STREAMLINED SORTING AND TRANSIT

Tech Logic's automated smartBIN containers are designed for the best ergonomic experience.

For efficient loading, unloading, and transport, smartBINS use oversized wheels with locking brakes. Automated sensors adjust the bin floor when items are added or removed.



With optional lids and batteries (for powered automation while away from the sorting system) smartBINS are ready for branch and central sorting, transit operations, and other varied workflows across the library.

***Our totalAMH UNLOADER system (left) is ideal for high-volume operations,*** because it gently and automatically unloads full smartBINS onto the AMH system without a staff member having to touch any items.

Tech Logic's totalAMH system works with a variety of containers—whether or not the containers are purchased through Tech Logic.

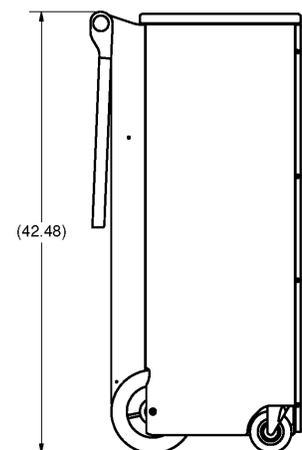
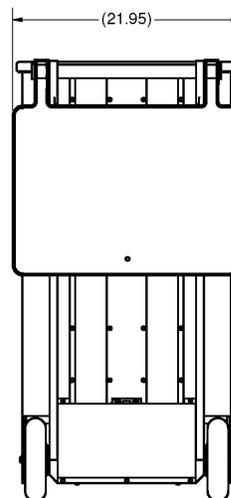
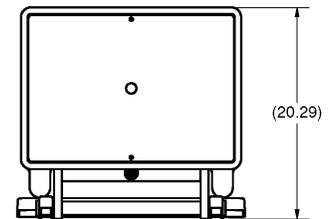
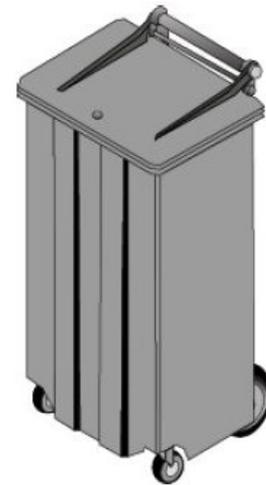


Check out Tech Logic's YouTube channel to see our smartBIN and totalAMH UNLOADER at work! [www.youtube.com/watch?v=M22XPoDCvZ0](https://www.youtube.com/watch?v=M22XPoDCvZ0)



## smartBIN (totalAMH Sorting Container Option)

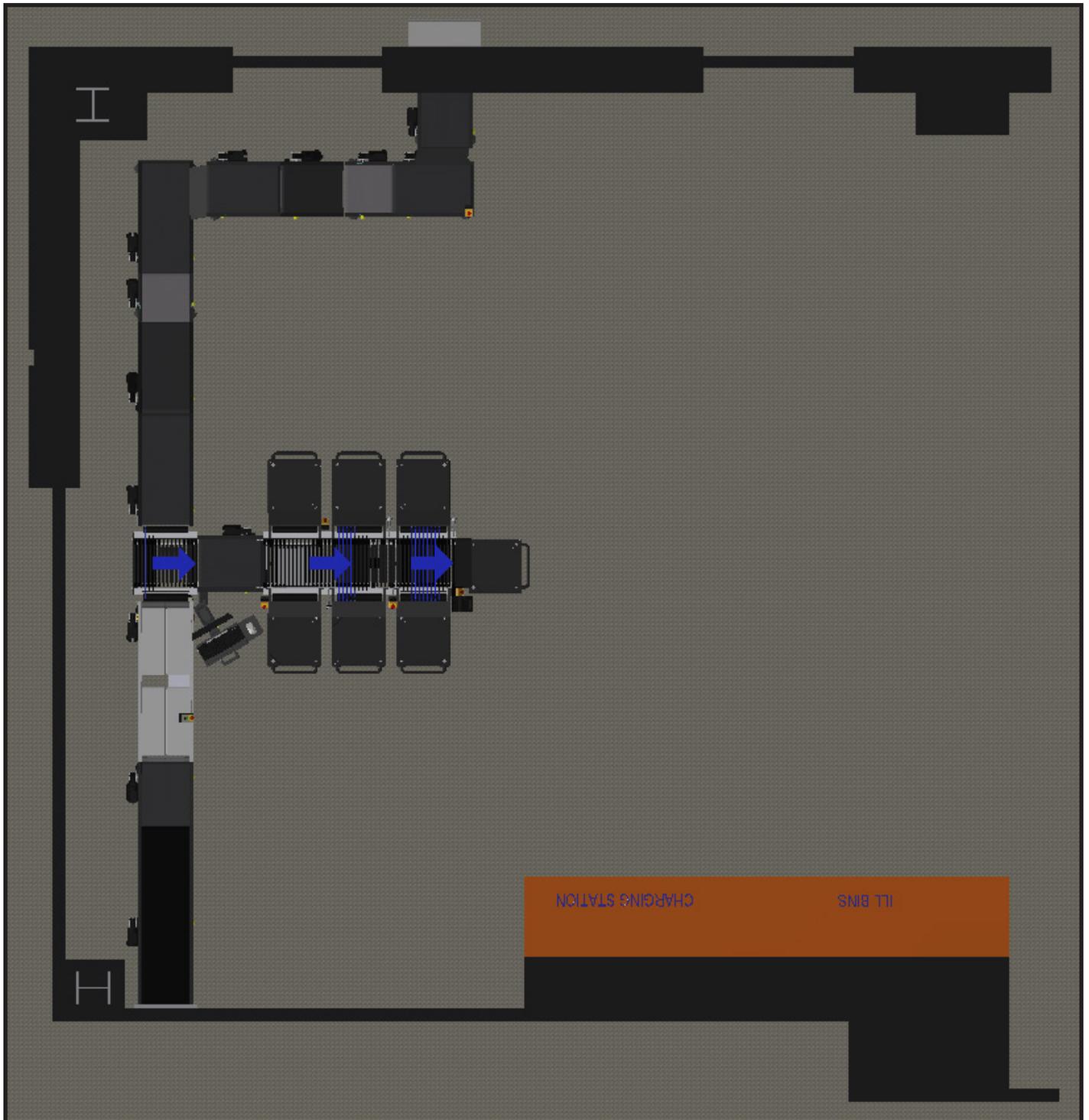
<b>Dimensions</b>	Please find dimensions, below
<b>Item Capacity</b>	125-150 Items
<b>Floor Adjustment</b>	Automatic raising or lowering based on items inducted or removed; Manual override included
<b>Power/Data</b>	Connects to totalAMH system during sorting operation. Away from totalAMH, automation powered by battery (optional)
<b>Wheels</b>	Large, durable, polyurethane wheels designed for travel indoors or outdoors Locking brake system
<b>Options</b>	Lid (for weather protection) Battery (for powered automation away from totalAMH system) Unloader (for automated induction of full smartBIN onto totalAMH system)







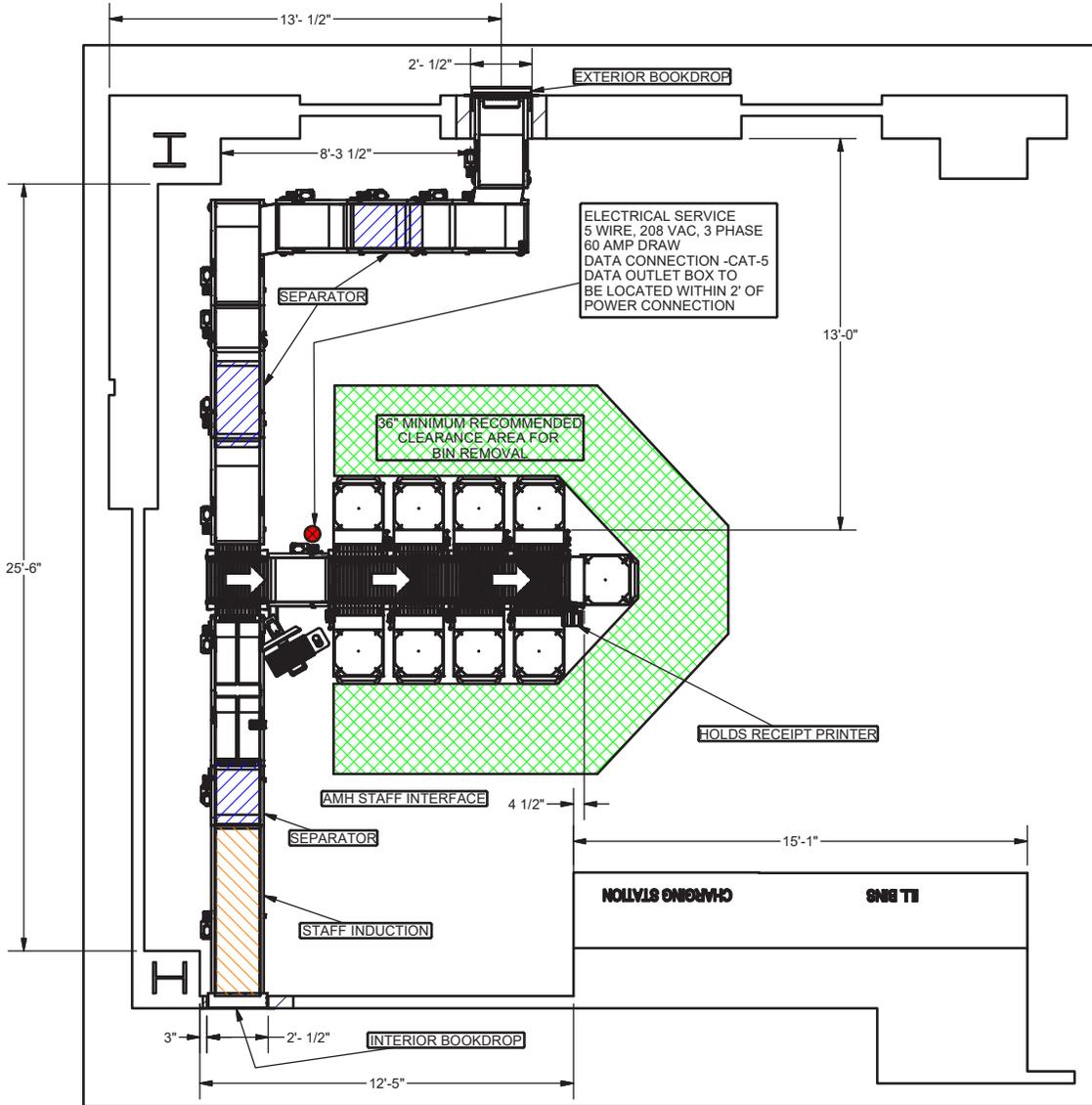
## totalAMH Rendering: 7 Sort Locations (shown with easyBINS)







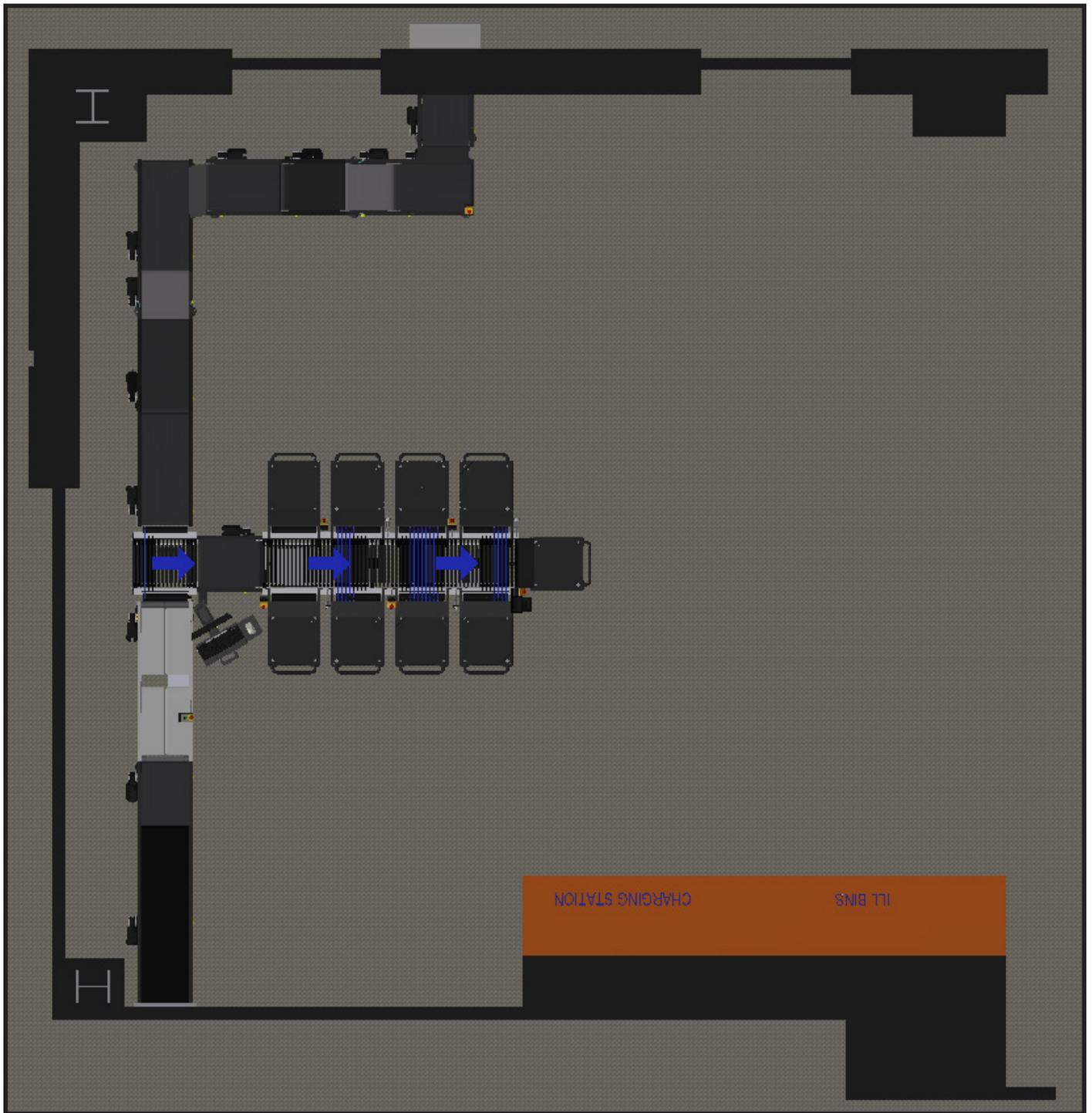
# totalAMH Mechanical Drawing: 9 Sort Locations



<p><b>PROPOSAL DRAWING</b></p> <p><b>DO NOT BUILD TO THIS PRINT</b></p> <p>DRAWING FOR REFERENCE ONLY SYSTEM LAYOUT MAY VARY ONCE CAD DRAWINGS ARE PROVIDED FOR VERIFICATION OF ELEVATIONS AND ROOM DIMENSIONS.</p>	<p><b>NOTES:</b></p> <ol style="list-style-type: none"> <li>ELECTRICAL REQUIREMENTS: 208 VAC, 3 PHASE, 5 WIRE SERVICE. SEE PRINT FOR LOCATION AND AMP DRAW. CUSTOMER RESPONSIBLE FOR BOOK DROP OPENING.</li> <li>OWNER'S ELECTRICAL CONTRACTOR WILL ROUGH IN POWER AT THE APPROXIMATE LOCATION SHOWN ON PRINT. OWNER'S ELECTRICAL CONTRACTOR TO VERIFY WITH OTHER TRADES.</li> <li>TECH LOGIC CABINET (SUPPLIED BY TECH LOGIC) DISTRIBUTION CABINET IS MOUNTED TO LIBRARY WALL THEN CONTRACTOR WILL NEED TO PULL CONVEYOR MOTOR FROM WALL AND CONNECT TO THE AMH SYSTEM. ONCE CONNECTIONS ARE MADE TECH LOGIC WILL VERIFY CONNECTIONS AND POWER UP SYSTEM.</li> <li>TECH LOGIC CABINETS ON MACHINE WILL BE COMPLETED BY FACTORY MOUNTED TO MACHINES. POWER CONNECTION BETWEEN CABINETS ON MACHINE WILL BE COMPLETED BY TECH LOGIC OR LOCAL CONTRACTOR AS REQUIRED.</li> <li>TECH LOGIC CABINETS ON MACHINE WILL BE COMPLETED BY CONNECTION TO LIBRARY'S WAN FOR SIP CONNECTION AND REMOTE TROUBLESHOOTING.</li> <li>TECH LOGIC CONFORMS TO ADA (AMERICANS WITH DISABILITIES ACT) REQUIREMENTS FOR ACCESSIBILITY (DEPOSITORIES, VENDING MACHINES, CHANGE MACHINES, MAIL BOXES AND FUEL DISPENSERS) AND SECTION 308 (REACH RANGES) SUBSECTIONS 308.2.1, 308.2 AND 308.1. UNRESTRICTED REACH RANGE: 10' 36" MAXIMUM THREE FEET (3'-0") MINIMUM CLEARANCE SUGGESTED FOR MANEUVERABILITY AROUND AUTOMATED MATERIAL HANDLING SYSTEMS.</li> <li>RECOMMENDED OPERATING TEMPERATURE RANGE: 65°F TO 78°F OPERATING TEMPERATURE LIMITS: 49°F TO 109°F.</li> </ol>
	<p><b>PROPRIETARY NOTICE:</b></p> <p>ALL DRAWINGS AND IDEAS HEREIN CONSTITUTE A CONFIDENTIAL AND EXCLUSIVE PROPERTY OF TECH LOGIC. ANY REPRODUCTION OR DISSEMINATION OF THIS INFORMATION WITHOUT WRITTEN AUTHORIZATION BE DIVULGED, REPRODUCED, COPIED OR APPROPRIATED IN WHOLE OR IN PART FOR ANY PURPOSE.</p> <p>STATE: <b>ILLINOIS</b>  COUNTY: <b>ADDITION</b>  BRANCH: <b>MAIN</b>  DESC: 9 BIN WITH DRIVE-UP</p> <p><b>Tech Logic</b>  ENGINEER: <b>pojambo</b>  DRAWN:  DWG SIZE: <b>B</b>  REV: <b>A</b> AT LNO SHIT: <b>1</b> OF <b>1</b>  DATE: <b>11/11/2020</b>  BY: <b>JL</b>  FILE: <b>JL_ADDISON PUBLIC LIBRARY_01_01_US_20200725_PRO</b></p>

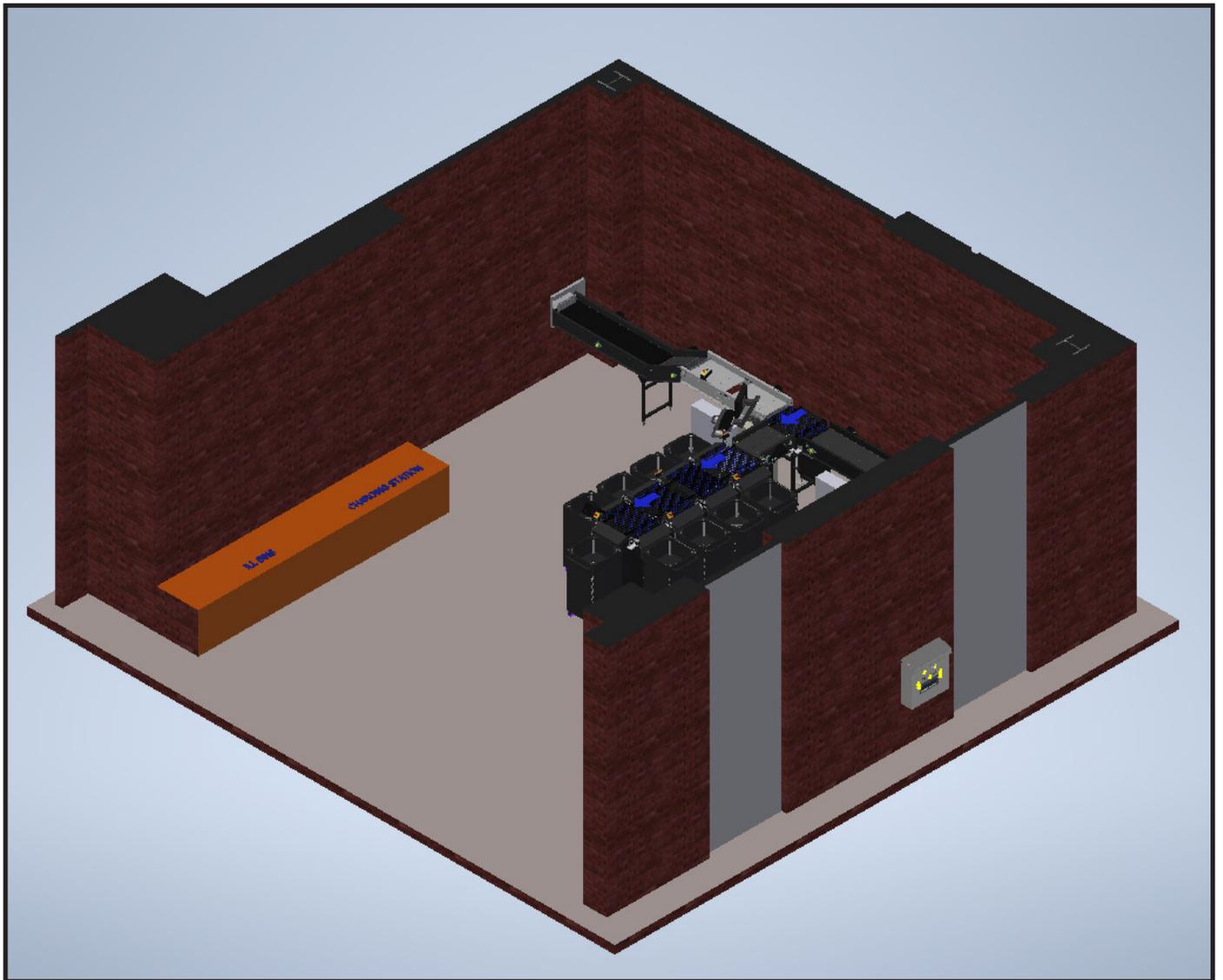


## totalAMH Rendering: 9 Sort Locations (shown with easyBINS)





## totalAMH Rendering: 9 Sort Locations (shown with easyBINS)





# General and Technical Requirements

Please indicate whether the proposed solution includes the following features/functionality:

## **Interoperability with SirsiDynix Symphony via SIP2 or API connectivity.**

Yes. Tech Logic's totalAMH connects to the library's ILS via SIP2—to identify items, update ILS data, print hold slips (if applicable), and sort the materials into corresponding bins—all based on the library's settings and sorting strategy.

## **Ability to print hold and transit slips at the staff induction without the item needing to be sorted into a bin.**

Tech Logic's design decisions are centered on the belief that staff members should not have to tether themselves to an induction station, processing items one-at-a-time. Rather, staff members should be able to induct handful-sized stacks onto designated conveyance and then walk away to complete other tasks. From there, Tech Logic's totalAMH system gently separates stacked items, and processes items based on the library's settings and sorting strategy.

The totalAMH system can sort transit/hold items to a designated bin, print corresponding slips in the order the items entered the bin, and make a partial cut of each slip so staff can easily place slips with items according to their desired placement. This straight-forward approach foregoes the need to induct and process items one-at-a-time at a staff station.

## **Ability to add length for additional bins in the future.**

Yes. Tech Logic systems are 100% expandable.

## **Use of remotely accessible cameras by Vendor used in the proposed solution.**

Physical cameras are not included with the proposed solution. The totalAMH system includes a comprehensive monitoring and management interface at the AMH location (on premise, and also accessible remotely via Remote Desktop Login or another remote connection software in use by the library) from which users can access system performance statistics, monitor the status and real-time activity of each section of conveyance, see when bins are full, conduct troubleshooting, and make configurations based on library operations and sorting strategy. The library can also configure email notifications for any or all of the following events: belt jams; full bins; SIP connection issue (after a configurable number of retries); induction issue. Some of our customers mirror the system's status display onto a large monitor within the AMH room for optimal visibility throughout the room. The interface is also accessible remotely via Remote Desktop Login or another remote connection software in use by the library.

## **The operating system and other applications included are updated by Vendor and serviced at no cost to APL.**

As part of the first-year warranty and out-year maintenance programs, Tech Logic ensures optimal and up-to-date functionality of Tech Logic's software within the library's IT ecosystem. Upgrades to Tech Logic software are free of charged and accomplished by the Tech Logic customer care team. When it comes to OS and CPU updates, the proposed solutions reside and operate on a library-provided (onsite or virtual) server deployment . While Tech Logic can



provide consultation regarding OS, CPU, security, and anti-virus updates, Tech Logic allows the library's IT organization to decide what tools and practices they want to implement.

### **Description of how adjustments are made to the sorting software and System.**

The totalAMH system includes a comprehensive monitoring and management interface at the AMH location (on premise, and also accessible remotely via Remote Desktop Login or another remote connection software in use by the library) from which users can access system performance statistics, monitor the status and real-time activity of each section of conveyance, see when bins are full, conduct troubleshooting, and make configurations based on library operations and sorting strategy. The library can also configure email notifications for any or all of the following events: belt jams; full bins; SIP connection issue (after a configurable number of retries); induction issue.

The totalAMH system uses customizable sorting profiles to implement the library's sorting strategies. Sorting profiles are configured using ILS data/directives such as holds, transits, transit holds, collection code, call number, set information, and more. Libraries can create their own sort profiles and can also switch between them through a drop-down menu in order to adjust to changing needs, strategies, and tasks.

### **The AMH system must be compatible with the ISO/IEC 15693 and ISO/IEC 18000-3 Mode 1 standard and with the NISO standard ISO-28560-2 tag data format.**

Yes.

### **AMH equipment must be UL listed, OSHA certified**

The proposed totalAMH system is designed with consideration for ADA and OSHA requirements. Patron and staff induction points are within ADA-compliant reach range. All electrical panels are UL listed. The RFID antenna and reader used within the totalAMH system are FCC certified. Emergency stop buttons are distributed at least every five feet throughout all parts of the system that undergo routine operator interaction. We are proud of the ergonomic principles that have always been foundational to our designs. With simple, multi-item induction for staff and patrons, our machines help prevent repetitive-motion injuries more effectively than machines that require one-at-a-time item processing or navigation of an interface.

### **The proposed system must not interfere with the other equipment, automated library system clients, or PCs that may be nearby.**

Yes. The proposed system will not interfere.



# Project Plan

For this project, Mike Heitzman, Senior Solution Specialist, will serve as the library's consultant regarding transition planning and strategy. During the planning and implementation phases of this project, Mike Heitzman and Jessica Perkins, Tech Logic's project manager, will serve as the Library's main points of contact. In addition, Tech Logic will be offering complimentary consultation with our Principal Librarian and Strategist, Gretchen Freeman. We encourage all prospective and current customers to reach out to Gretchen because she has over 40 years of experience implementing technology in libraries. You can reach Gretchen at [gfreeman@tech-logic.com](mailto:gfreeman@tech-logic.com).

Tech Logic's Project Manager will ensure efficient and effective project completion including library readiness, hardware construction/supply, software configuration, installation, testing, training, and more. Software engineers are integral to this process and, upon project completion and approval, our customer support team will take responsibility for ongoing support regarding the project.

All of our proposed solutions align with ISO industry standards because we are committed to suitability, longevity, and interoperability within the library industry. More than that—our *people* are committed to collaboration, customization, and long-term relationship with libraries.

- For information about Key Project Personnel, please see page 26.
- For an overview of Sample Project Milestones, please see page 27.
- For information about Library Responsibilities please see page 28.
- For information about Training and Ongoing Success, please see page 30.
- For information about Warranty and Support, please see page 29.



***"Tech Logic hires incredibly competent, compassionate, and thorough employees.  
Always work well with this company."***

*Nichole Valencia, Assistant Library Director - Mustang Public Library (OK)*



## Key Personnel

Please find an outline of project leadership, below, introducing key leaders who will ensure the success of APL's project.

**Mike Heitzman—Senior Solutions Specialist.** Mike is responsible for helping APL with project strategy. After working on the Tech Logic team from 2010 to 2013, Mike Heitzman joined back with Tech Logic in April 2022 as a Senior Solution Specialist. Mike brings a wealth of experience and insight to the Tech Logic team, having worked directly with libraries and publishing companies around the world since 2001. Ultimately, Mike's goal is to help libraries find and implement the best solutions for their individual needs. Mike earned his BA in Business Administration and German from the University of St. Thomas in St. Paul, MN.

**Jessica Perkins—Project Manager.** Jessica Perkins and her team are responsible for successful project planning, execution, and follow-up. Jessica will serve as the library's point of contact for project requirements, planning, status, execution, and follow-up. Jessica joined Tech Logic in 2018 and has a Bachelor of Arts in Business Management from the University of St. Thomas (St. Paul, MN) and a Master of Science in Project Management from St. Mary's University (Minneapolis, MN).

**Joel Neppl—Customer Care Manager.** Joel Neppl and the customer care team at Tech Logic ensure that Tech Logic solutions are properly installed, maintained, and operational. Joel joined Tech Logic in 2018 and, in total, brings over 14 years of customer care management experience to the team. Tech Logic's customers describe Joel as "easily reached," "knowledgeable," "thorough," and "great with customer relations." Joel earned his BA in Exercise Science from Creighton University.

**Tracie Hanson—General Manager.** As Tech Logic's general manager, Tracie is responsible for ensuring the success of all Tech Logic operations and personnel. Tracie joined Tech Logic in 2007 as a customer care account manager. She advanced within the company and became Tech Logic's general manager in 2018. Tracie has over 20 years of customer service, sales, entrepreneurial, and project management experience with a strong focus on implementation, training, and continued support. Throughout this career, Tracie has built strong relationships with customers. Tracie attended the UW (University of Wisconsin)-Stout in Menominee, WI.

**Chris Blazek—Automation and Development Manager.** Chris Blazek and his team are responsible for the efficient, effective development of Tech Logic's automation systems. Chris joined Tech Logic in 2008 as a software engineer and he now leads the software, electrical, and mechanical engineering teams while continuing to contribute foundational enhancements and support for all Tech Logic product lines. Chris earned his Master of Computer Science degree from Michigan Technological University.

**Gretchen Freeman—Principal Librarian and Strategist.** Gretchen is responsible for providing expert insights and consultation for APL throughout the project and on an ongoing basis. At Tech Logic, Gretchen builds upon over forty years of library industry experience. Gretchen was most recently the Associate Director for Technology at the Salt Lake County urban library system in Utah, where she implemented RFID systems and strategies system-wide. Gretchen holds an MLS from the University of Missouri-Columbia.

**Kenneth Fischer—Lead Service Technician.** Ken has been with Tech Logic since 2001, bringing customer care and project management experience as he leads the totalAMH system team with installations, preventative maintenance, system diagnosis, and other onsite services.



## Sample Project Milestones

***Please note: the Sample Project Milestones shown, below, are for informational purposes. Final project-specific responsibilities and timelines will be discussed during project kickoff and will depend on specific project parameters.***

- Tech Logic initiates project when all contract documents have been signed by all parties.
- Tech Logic assigns project manager to library project.
- Project manager sends introduction email to customer with information, explanations, and instructions for necessary documentation.
- Via conference call, Tech Logic and library further discuss detailed project milestones, questions, and other more granular project elements.
- Tech Logic sends documentation to library for review, questions, and completion: Customer Approval Drawings, readiness guide, sorting table files, and other necessary documentation.
- Library provides completed/approved Customer Approval Drawings (CAD) and readiness guide.
- Library begins any necessary building/electrical work to prepare for AMH installations.
- Tech Logic orders necessary AMH system parts.
- Tech Logic manufactures systems based on library-approved Customer Approval Drawings (CAD).
- Library provides completed/approved sorting table files.
- Library sends test materials to Tech Logic for live SIP2 testing.
- Tech Logic's software team configures and tests system software.
- At our facility, Tech Logic conducts full factory acceptance test of completed AMH systems.
- Tech Logic and library discuss granular timeline and details for AMH delivery and installation, based on agreed-upon contract parameters.
- Tech Logic ships AMH systems per agreed-upon contract parameters.
- Library receives AMH systems per agreed-upon contract parameters.
- Tech Logic installs, configures, and tests AMH hardware and software systems per installation plan and agreed-upon contract parameters.
- Tech Logic technicians train library staff and stakeholders on use of and care for the AMH system, addressing any customer questions or concerns. Detailed user manuals, schematics, etc. are also provided. Training session(s) and times are determined by the needs of library staff.
- Library operates machine and discusses questions or concerns with Tech Logic.
- Upon acceptance, Library provides Tech Logic with notice of project completion/acceptance.
- After project completion, Tech Logic's customer care team contacts the library to ensure continued satisfaction.
- First-Year Warranty commences, followed by subsequent years' continued support per the library's chosen maintenance program and agreed-upon contract parameters.



## Library Roles and Responsibilities

*Please note: the following list of responsibilities is intended for informational purposes only, as a foundation for further consultation.*

- **Library Network.** All of our totalAMH systems are built with an embedded industrial PC (front-panel rating of IP65) running Windows Enterprise LTSC for optimal long-term stability. The proposed solutions are on-premise systems that will reside and operate on the library's network and so, like other on-premise systems within the library, the proposed solutions will benefit from and depend on the library's network security, backup, remediation, update, and restoration policies and procedures. As part of the software license, Tech Logic ensures optimal functionality of the totalAMH software on the PC within the sorting room.
- **Production Drawing Approval.** The customer reviews the system drawings with the architect or other building authorities to ensure that the system contains all of the components proposed and conforms to the space available, while not interfering with other building structural elements. The key dimensions referencing elevations and layout must be verified. The manufacturing of the system is contingent on the authorized signature of the system layout. Any changes that need to be made to the system after approval in order to allow for successful installation are contingent on a change order form (included in contract).
- **Interface with the ILS.** The system requires an interface with the Library's ILS. The customer is responsible for purchasing and/or contracting with its ILS vendor for a Standard Interchange Protocol 2 (SIP2) connection that will allow the system to interface with the ILS.
- **Electrical, Mechanical, and Finishing Work.** At its own expense, the customer needs to hire electrical and mechanical contractors to wire power to the system and provide any millwork necessary for installation of the system. Any building modifications required to install the sorting system are the responsibility of the customer. For electrical and data requirements, please see the mechanical drawings on pages 17 and 20.
- **Availability of Facilities.** Customers need to provide adequate work space and storage space at the installation site for Tech Logic to facilitate the installation of the system for up to four (4) of Tech Logic's personnel. Tech Logic requires continuous free and unobstructed access to all areas in which components will be installed, without having to move operations to other areas.
- **Client Acceptance of Risk.** Tech Logic needs customers to provide safe and enclosed storage of all the system components until we are onsite for installation. Except for damage caused by Tech Logic's agents, the customer bears all risk of loss and damage of the system components from and after delivery at the location designated by the customer.



## Ongoing Support and Maintenance

Tech Logic offers comprehensive service and technical support to maximize product reliability and performance, which includes ***complimentary first-year warranty and software licenses on all products.***

After the complimentary first-year warranty and software licenses, our annual programs are designed so that you can select the level of service and support that meets your library's specific business needs.

Sample language for warranty and support programs can be found within the following page references within this proposal.

**Please Note:** the language shown in the pages referenced, below, are for informational purposes only. Tech Logic is open to discussing adjustments to the final agreement.

- For details regarding overall customer care policies and practices, please see the section beginning on page 46.
- For details regarding the complimentary first-year warranty for totalAMH systems, please see the section beginning on page 49.
- For details regarding software licensing for all systems, please see the section beginning on page 53.
- For details regarding totalAMH maintenance programs (after the first-year warranty) please see the section beginning on page 56.



# Training

Tech Logic provides onsite training as well as manuals, detailed mechanical drawings and electrical schematics, comprehensive maintenance schedule, spare parts detail, and software backup disks. Our installers/trainers have the necessary skills to provide first-hand knowledge of our library solutions for library staff.

Training topics are customized to meet the needs, questions, and scenario of each customer and each totalAMH system. The following list serves as an overview of foundational training topics:

## **totalAMH Staff Interface**

- Standard operating procedures
- System navigation, monitoring, and configuration
- Creating, changing, and switching sort profiles
- Statistics and reporting
- Windows 10 LTSC (OS, network, etc.)

## **System Safety**

- Safety orientation and precautions
- E-stops (and restart procedures)

## **Induction**

- Multi-item induction for patrons (interior and/or exterior, where applicable)
- Multi-item induction for staff

## **Conveyors**

- Automatic separation of stacked items
- Overview of belt, strait, sandwich, curved, and line-shaft conveyors (as applicable)
- Photoelectric sensors

## **Sorting Section**

- Machine vision technology section
- Pop-up transfers

## **Receptacles/Bins**

- Procedures for item containers

## **Maintenance and Support**

- Manuals and other documentation
- Customer care procedures
- Routine cleaning and maintenance tasks
- Preventative maintenance visits

## **Troubleshooting**

- First-level troubleshooting and service procedures
- Library power disturbances
- Item jams

## **Continued System Onboarding and Acceptance**

- Library testing and questions
- Review and follow-up as needed

In addition to Tech Logic's initial training and ongoing maintenance plans, Tech Logic can extend onsite training at the library's request covering additional training as requested by the library. A number of flexible options can be quoted to meet our customer's needs—from onsite training to electronic/web based training. Customers are also welcome to travel to Tech Logic's manufacturing facility in Minnesota for in-depth maintenance training on their AMH system during factory acceptance testing. This extra training at our location is offered to the library free of charge. Travel, hotel, car, and meals would be the responsibility of the library.



# Financial Information

## **Demonstration of the financial strength and stability of the Vendor.**

Based on over 27 years working exclusively with libraries on hundreds of implementations, Tech Logic understands the resources that this project will require, and we attest that we have the financial and organizational capacity to perform the scope of services required by APL.

As one testament to this financial stability, we have attached a reference letter from our financial institution on page 44.

## **State if the Vendor is presently negotiating a sale, acquisition, or merger that would alter Vendor's existing structure.**

Tech Logic has no plan or intention to enter into negotiations for sale, acquisition, or merger with any vendor.

## **Any other information that demonstrates the Vendor's experience, ability, and capacity to produce the required outcomes in the RFP.**

In addition to the personnel serving on the customer care and project management teams, we also encourage you to reach out to Tech Logic's principal librarian and strategist, Gretchen Freeman, who is passionate about helping libraries improve their workflow, free up their staff, and bolster their patrons' experience.

At Tech Logic, Gretchen continues forty years of leadership experience in the library technology industry by helping our prospective and current customers optimize their use of library technology. Please reach out to Gretchen at [gfreeman@tech-logic.com](mailto:gfreeman@tech-logic.com) with any questions you have about library technology and workflow in your unique space. For introductions to other library leaders who will be integral to the success of this project, please see page 26.

# Parts Availability

**To ensure ready availability of components, parts, and supplies, all major elements of the system must be warehoused in the U.S.A., or the Vendor must demonstrate the ability to have parts available within 24 hours of request.**

Service technicians are either equipped with parts or Tech Logic will coordinate parts shipment to reduce downtime and provide service in accordance with the Customer Care Guidelines on page 46.



# Maintenance and Support

**APL prefers that Vendor support be available during most Library open hours with a response time of four hours or less for critical hardware and software issues. APL prefers to contact Vendors via telephone or web/email-based ticketing system for support requests.**

Yes. Tech Logic offers comprehensive service and technical support to maximize product reliability and performance. Services include the following:

- Toll-free phone support, available as a standard service (1-866-880-9981).
- Email support via [customercare@tech-logic.com](mailto:customercare@tech-logic.com)
- A web-based support system that provides 24/7 online access. Tech Logic's web-based support system provides 24/7 online access to our customer care team. This support system is monitored after hours and on weekends to ensure assistance during off hours for critical situations.

In critical-down scenarios, Tech Logic seeks to propose a resolution plan no more than three hours from support request. For more information about customer care policies and procedures, please find our Customer Care Guidelines beginning on page 46.

**Please describe ongoing maintenance and support offered by the Vendor, including availability of telephone or web-based support and support response times.**

Yes. Tech Logic offers comprehensive service and technical support to maximize product reliability and performance, which includes complimentary first-year warranty and software licenses on all products.

After the complimentary first-year warranty and software licenses, our annual support and maintenance programs are designed so that you can select the level of service and support that meets your library's specific business needs. For pricing, please see pages 37 and 39.

For details regarding the complimentary first-year warranty, please see page 49.

For details regarding software licensing, updates, and upgrades, please see page 53.

For details regarding AMH Support and Maintenance programs that come into effect after the complimentary first-year warranty, please see the section beginning on page 56.

For details regarding overall customer care policies and practices for warranty and support program holders, please see the section beginning on page 46.



**Describe any preventative maintenance plans for the proposed solution that the Vendor recommends including recommended APL staff cleaning and maintenance tasks.**

Yes. After the complimentary first-year warranty and software licenses, our annual support and maintenance programs are designed so that you can select the level of service and support that meets your library's specific business needs. For pricing, please see pages 37 and 39.

For details regarding AMH Support and Maintenance programs (after the complimentary first-year warranty), please see the section beginning on page 56.

Tech Logic provides a daily/weekly/monthly totalAMH maintenance sheet to all AMH customers outlining our recommended maintenance to be performed by the library as outlined on the schedule.

There are five major preventative maintenance objectives covered by the daily/weekly/monthly totalAMH maintenance sheet:

1. Keep the machine clean. Periodically clean dirt from sensitive areas. Certain items such as photo eyes require periodic cleaning because they are sensitive to deposits of dirt and dust. Keep the area around the system clear of clutter and maintain easy access for operators.
2. Inspect for symptoms of a failing component. If a part fails, there are usually symptoms such as unusual wear on products, poor performance, or unusual noise or vibration.
3. Provide lubrication. Periodic lubrication is required to prevent premature wear or failure on moving parts.
4. Provide necessary adjustments. Parts of this system may need re-adjustment over time with exposure to vibration, shock, or aging.
5. Inspect components for normal wear and tear. Some mechanical parts wear out through use, and their replacement is expected.
6. Record Keeping. Tech Logic recommends that an activity log is kept to provide tracking of service and operating issues.



# Warranty and Service Requirements

**APL expects to call one toll-free telephone number to obtain all support including software and hardware service for all elements of the system and all transaction assistance with the payment systems.**

Yes. Tech Logic offers comprehensive service and technical support to maximize product reliability and performance. Services include the following:

- Toll-free phone support, available as a standard service (1-866-880-9981).
- Email support via [customercare@tech-logic.com](mailto:customercare@tech-logic.com)
- A web-based support system that provides 24/7 online access. Tech Logic's web-based support system provides 24/7 online access to our customer care team. This support system is monitored after hours and on weekends to ensure assistance during off hours for critical situations.

**Does the Vendor directly provide all hardware and software support for all items proposed? If not, who provides the service?**

Tech Logic is the first point of contact for all hardware and software support. Tech Logic facilitates all customer care and support through our headquarters in Oakdale, MN in accordance with the applicable warranty or, for subsequent years, the applicable support agreement. Tech Logic fulfills all remote technical calls in-house at Oakdale, MN, and also conducts onsite preventative maintenance and support visits with our core team of AMH technicians.

Additionally, to further expand our network, we do fulfill certain AMH maintenance and repair projects through a trusted service partner with Tech Logic certified technicians stationed throughout North America.

**How many full-time support technicians are available in the Midwest (US)?**

Tech Logic employs three full-time technical support representatives at our headquarters in Oakdale, MN, and we also employ three full-time AMH technicians who travel the country conducting AMH support and preventative maintenance visits.

To further expand our network and ensure expedient response times, we also fulfill certain AMH maintenance and repair projects through a trusted service partner with Tech Logic certified technicians stationed throughout North America (including several within the Chicago area).



**The Vendor must provide an all-inclusive 12-month extended warranty on equipment, software, and components. A maintenance / service contract must be offered and are subject to negotiation by the Library.**

Yes. For details regarding the complimentary first-year warranty, please see page 49.

For details regarding software licensing, updates, and upgrades, please see page 53.

For details regarding AMH Support and Maintenance programs that come into effect after the complimentary first-year warranty, please see the section beginning on page 56.

For details regarding overall customer care policies and practices for warranty and support program holders, please see the section beginning on page 46.

**The Vendor must offer a 12-month 100% money-back performance guarantee on all equipment purchased and covered by a 12-month extended warranty or service agreement.**

Yes. For details regarding the complimentary first-year warranty, please see page 49.

For details regarding software licensing, updates, and upgrades, please see page 53.

For details regarding AMH Support and Maintenance programs that come into effect after the complimentary first-year warranty, please see the section beginning on page 56.

For details regarding overall customer care policies and practices for warranty and support program holders, please see the section beginning on page 46.

**Software patches and service pack releases must be supplied at no additional charge to the Library while under maintenance.**

Yes. For details regarding software licensing, updates, and upgrades, please see page 53.

**Feature updates and new software versions must be included at no additional charge while under maintenance.**

Yes. For details regarding software licensing, updates, and upgrades, please see page 53.

**Service technicians must be fully trained, factory authorized, and certified by the manufacturer to perform service on the machine.**

Yes.



# Pricing

## First-Year Costs: 7-Bin totalAMH System totalAMH: 7 Sort Locations

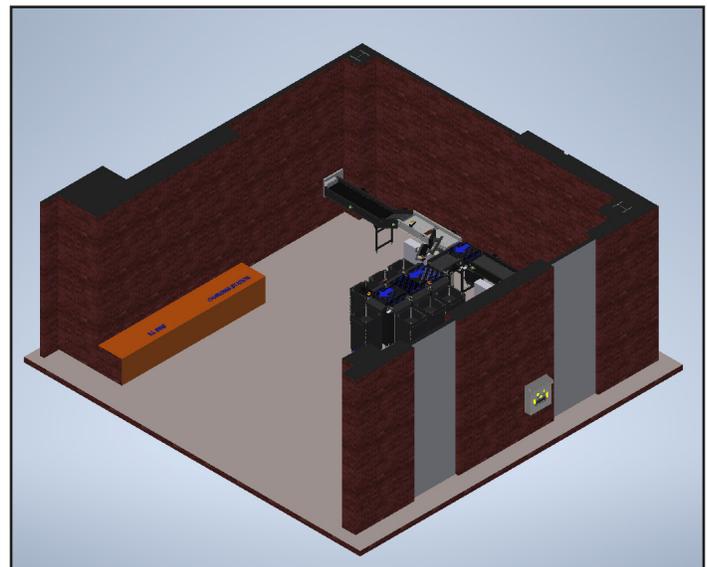
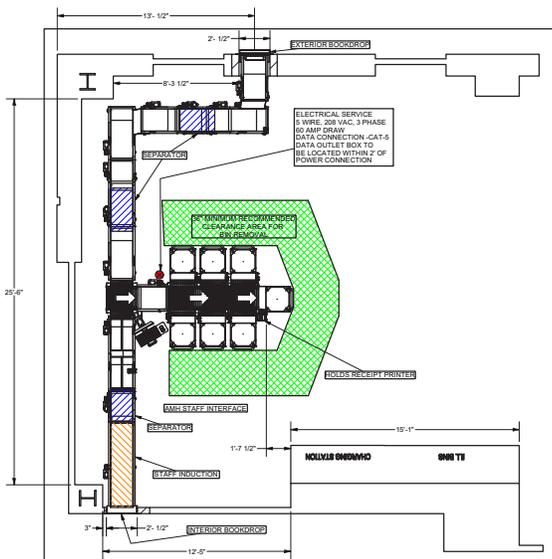
Product Description	Quantity	Unit Price	Extended Price
totalAMH (7-bin, interior and exterior drop)	1	\$162,682.70	\$162,682.70
Multi-Bin System Control Software	1	\$7,914.03	\$7,914.03
Installation & Training	1	\$7,217.60	\$7,217.60
easyBIN (product information on page 13)	9	\$1,695.00	\$11,865.00
Estimated Shipping	1	\$6,100.00*	\$6,100.00*
First-Year Warranty and First-Year Onsite Preventative Maintenance Visit	1	Included	Included
		<b>TOTAL</b>	<b>\$195,779.33</b>

\* Shipping charges are estimated based on all products shipping at the same time F.O.B. destination. Multiple shipments will result in increased charges.

Please see Sample Payment Terms on page 40.

## Alternative/Optional Sorting Container: smartBIN

Product Description	Unit Price
smartBIN (would replace easyBINS) (product information on page 15)	\$4,695.00





# Out-Year Support & Maintenance Programs: 7-Bin totalAMH System

After the complimentary first-year warranty expires, libraries choose one of our support and maintenance programs for out-year preventative maintenance and service. Software licensing and remote technical support are included with all programs.

## (Minimum Required) Preventative Maintenance Program with Software License

Tech Logic’s PM1 Program includes one annual onsite preventative maintenance visit, remote technical support, and discounts on any necessary replacement parts. Labor, parts, and travel for onsite service (outside of the included preventative maintenance visit) will be quoted as an additional cost. For more details, please see page 57.

Description	Annual Price (9-Bin totalAMH)
Preventative Maintenance Program (PM1) with Software License	\$7,950.00* per year (beginning year two)

\* Beginning in year three, annual costs automatically increase by 2% per year, unless prepaid. Please find sample payment terms on page 40.

**OR**

## (Replaces PM1) Warranty Continuation Program with Software License

As an alternative to the PM1 program, Tech Logic’s WCP covers all expenses for twice-annual onsite preventative maintenance visits, remote technical support, onsite repair calls, parts, and shipping. This is a continuance of your first-year “bumper-to-bumper” warranty, in effect every year with NO additional costs for parts, software, labor, travel, nights, weekends, and/or overtime. For more details, please see page 58.

Description	Annual Price (9-Bin totalAMH)
Warranty Continuation Program (WCP) with Software License	\$19,580.00* per year (beginning year two)

\* Beginning in year three, annual costs automatically increase by 2% per year, unless prepaid. Please find sample payment terms on page 40.





# Out-Year Support & Maintenance Programs: 9-Bin totalAMH System

After the complimentary first-year warranty expires, libraries choose one of our support and maintenance programs for out-year preventative maintenance and service. Software licensing and remote technical support are included with all programs.

## (Minimum Required) Preventative Maintenance Program with Software License

Tech Logic's PM1 Program includes one annual onsite preventative maintenance visit, remote technical support, and discounts on any necessary replacement parts. Labor, parts, and travel for onsite service (outside of the included preventative maintenance visit) will be quoted as an additional cost. For more details, please see page 57.

Description	Annual Price (9-Bin totalAMH)
Preventative Maintenance Program (PM1) with Software License	\$7,950.00* per year (beginning year two)

\* Beginning in year three, annual costs automatically increase by 2% per year, unless prepaid. Please find sample payment terms on page 40.

**OR**

## (Replaces PM1) Warranty Continuation Program with Software License

As an alternative to the PM1 program, Tech Logic's WCP covers all expenses for twice-annual onsite preventative maintenance visits, remote technical support, onsite repair calls, parts, and shipping. This is a continuance of your first-year "bumper-to-bumper" warranty, in effect every year with NO additional costs for parts, software, labor, travel, nights, weekends, and/or overtime. For more details, please see page 58.

Description	Annual Price (9-Bin totalAMH)
Warranty Continuation Program (WCP) with Software License	\$21,570.00* per year (beginning year two)

\* Beginning in year three, annual costs automatically increase by 2% per year, unless prepaid. Please find sample payment terms on page 40.



# Sample Payment Terms

**PLEASE NOTE: The following is only intended for informational purposes. Tech Logic is open to discussing payment terms.**

Quoted prices are valid for 45 days. If the library requests a delay between purchase order and delivery, such a delay may cause price changes in order to accommodate significant variations in market price for parts and materials. These market-price variations for parts and materials are outside of Tech Logic's control. For questions about this, please reach out to your Tech Logic Solutions Specialist—we are committed to working closely and transparently with you during these unique times.

Shipping charges estimated on all quoted products shipping at the same time F.O.B. destination. Shipping is estimated and calculated using today's rates to one receiving location, unless otherwise noted. Additional shipping charges may apply. Multiple shipments may result in increased charges.

I. A first payment, in an amount of forty percent (40%) of the Contract Price, shall be due within ten (10) days after the Effective Date. Work pursuant to this Agreement shall not begin until such payment is received and verified by Tech Logic.

II. A second payment, in an amount of fifty percent (50%) of the Contract Price, shall be due within ten (10) days after a Notice of Completion of Manufacturing Design is submitted to Library.

III. A third payment, in the amount of (5%) of the Contract Price, shall be due within ten (10) days of the date on which notification is made by Tech Logic to Library that manufacturing, final testing and pre-shipment inspection of the TLS is complete and ready to be shipped to Library. Library has the right and may elect to inspect the TLS (at the Library's expense) prior to actual shipment to Library. Failure of the Library to inspect the TLS prior to shipment to the Library shall not cause a delay of the third payment to Tech Logic.

IV. Final payment, in an amount of five percent (5%) of the Contract Price, plus all additional payments required under executed Change Orders, if any, shall be paid within ten (10) days of Tech Logic's delivery to the Library of the Notice of Completion.

Further, if a delay occurs, then the final 5% payment hereunder shall be paid by Library within sixty (60) days of shipment from Tech Logic. In any event, the final 5% payment hereunder shall be paid by Library within ninety (90) days from the date on which notification is made by Tech Logic to Library that the TLS is ready for shipment to Library.

Late Payments: If any payments due from Library to Tech Logic are deemed to be, in the sole discretion of Tech Logic, overdue, then interest charges thereon shall be paid by Library to Tech Logic at a rate of one and one-half percent (1.5%) per month.

Performance Bond & Payment Bond: Costs associated with Performance & Payment bond requirements are the sole responsibility of the library.

# **BOARD BYLAWS**

## **Article IV - Meetings**

### **Section 4: Annual Meeting**

The annual meeting shall be held in May, ~~at which time the Library depository and related signatories shall be designated.~~

## **Article V - Committees**

### **Section 2: Standing Committees**

For all standing committees, the Library Board of Trustees shall function as a committee of the whole. The standing committees shall be as follows:

- Finance
- Facilities
- Policies
- Strategic Planning
- ~~Policies and Planning~~
- ~~Personnel~~

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# **BOARD POLICIES**

## **SECTION I**

# **INTRODUCTION**

## **AMENDMENT OR SUSPENSION OF POLICY**

Illinois Statutory law requires the Board to establish and review at least biennially a written policy for the selection of library materials and the use of library materials and facilities. Policies will be considered for their accuracy and appropriateness, and recommendations will be made to the Board for amendment, addition, or elimination. Except as otherwise provided by law, any policy of the Board may be suspended, repealed, amended, or waived by a majority vote of the Board, ~~provided that at least two full weeks advance notice has been given of the intention to consider revocation, repeal, waiver, or amendment.~~

## SECTION II

# BOARD ORGANIZATION

## ANNUAL MEETING

There shall be an annual meeting of the Board held in May of each year. At this meeting the Board shall elect officers for the new fiscal year.

The following resolutions shall also be approved:

- Resolution authorizing transfer of amount without increasing the total appropriation for the preceding fiscal year;
- Resolution comprising statement of financial requirements of the library for inclusion in the appropriation of the corporate authority for library purposes for new fiscal year and statement as to accumulations and reason therefor;
- Resolution amending building plan, providing for accumulation of funds, and authorizing expenditure from reserve fund for building purposes.

~~In addition, the Board shall examine the preceding fiscal year's annual report and select Board meeting dates as well as library depositories and related signatories for the new fiscal year.~~

## MANAGEMENT OF PUBLIC COMPLAINTS

When a Trustee is contacted by a member of the general public who has a concern or complaint about the Addison Public Library or persons within Addison Public Library, the Board member needs to report that communication directly to the Director or advise the person about the formal complaint process. The Board member shall follow these guidelines:

- Remember that individual Board members have no power or authority to speak or act for the full Board.
- Listen to the person's concern;
- Express a desire to reach a satisfactory solution;
- Explain that the Board and management have established a process for handling concerns, which starts with the person most immediately responsible. Suggest that the concern be discussed with the person immediately responsible;
- ~~Refer public complaints to the official complaint forms~~ **Recommend that the person fill out a patron comment card or a Statement of Concern form, which are available at the library public service desks or email the Library Board and/or Director (addresses posted on library's website).** ~~to the link to the Board of Trustees on the library website. One form is for dealing with challenged materials; the other is for all other issues;~~
- Inform the Director of the complaint or concern.

Guidelines for Processing Public Complaints are outlined in Public Services Policy 8.3, *Question or Complaint about Library Policies and Procedures*.

~~From time to time situations may occur that create legitimate complaints on the part of the public or constituents relative to the Addison Public Library. Complaints must be aired so that all sides of the issue may be heard and a rational procedure/solution found.~~

~~Anyone having a complaint, therefore, is encouraged to file a complaint. Forms are available at all public service desks in the library. The person originating the complaint must sign all complaint forms. The nature of the complaint should be stated as well as the relief sought.~~

## ~~Process for Dealing with Complaints Other Than Challenged Library Materials~~

- ~~1. The complaint form shall be filed with the Director.~~
- ~~2. Where appropriate, the Director shall refer the complaint form to the relevant Department Head.~~
- ~~3. The Director will secure a resolution or response to the complaint.~~
- ~~4. The Board will be informed about the complaint and the proposed remedy.~~

~~[See [Materials Selection Policy](#) for process for dealing with challenged materials.]~~

### SECTION III

# **BOARD MEETINGS**

## **MEETING AGENDA AND INFORMATION PACKET**

All matters to be considered by the Board at the meeting shall be included on the agenda. All informational materials needing to be reviewed before the meeting will be posted on a secure online repository four days prior to the meeting. The Addison Public Library Board meeting agenda shall approximate the following outline:

- Opening Items
  1. Call to Order
  2. Roll Call
  3. Pledge of Allegiance
  4. Approval of Agenda
  5. Comments from the Public
- Financial Report by Treasurer
- Consent Agenda

1. Minutes
2. Treasurer's Report
- Reports
  1. Director and Staff Reports
  2. Friends of the Library Report
  3. Monthly Statistics
- Unfinished Business
- New Business
- Closed Session – if needed
- Correspondence and Announcements
  1. Libraries in the News
  2. Other Correspondence
  3. Monthly Statistics
- Additional Discussion
- Adjournment

## PUBLIC COMMENT

The Board of Trustees of the Addison Public Library welcomes comments from the public and will hear from any interested individual who wishes to address the Library pursuant to the guidelines outlined in this policy.

Public comment at meetings of the Library shall be restricted to civil discourse, free from disparaging remarks or inferences toward any person or organization. Speakers who fail to observe this protocol will be ruled out of order. The individuals appearing before the Library are also expected to follow these guidelines:

1. Members of the public may address the Library only at the appropriate times as indicated on the agenda, and when recognized by the Board President or meeting chair.
2. Individuals are expected to identify themselves by full name. Individuals are also requested **but not required** to provide their address.
3. The time allowed for each individual to speak shall be limited to 3 minutes. A speaker may not cede time to another speaker.
4. No more than 20 minutes shall be allowed for public comment at each meeting.
5. There shall be no expectation of immediate response on any matters raised during public comment. The Board may, however, refer any matter of public comment to the Library Director, Library staff, another appropriate individual or agency, or may place the matter on a future meeting agenda for reply.
6. The Board President or meeting chair shall have the authority to determine procedural matters regarding public comment at Library meetings not otherwise defined in Board policy.

## SECTION V

# COMMITTEES

### **COMMITTEE PURPOSE**

It shall be the purpose of any committee appointed by the Addison Public Library Board to assist the Board of Trustees in governing more efficiently and effectively. A Board committee is not designed to do staff work. Committees shall be used to investigate, deliberate, and analyze special issues on behalf of the Board.

### **COMMITTEE ACCOUNTABILITY**

Any committee established by the Board shall have only the powers specifically delegated to it by the Board. Functions of each committee shall be in writing as part of Board policy or recorded in the minutes of the meeting that the committee was established.

Committees are a subsidiary of the Board and shall be expected to report their work to the full Board on a regular basis. Each committee shall be expected to make recommendations to the Board for action in the form of a motion at a full Board meeting.

### **APPOINTMENT OF SPECIAL COMMITTEES**

Special committees of the Board may be created from time to time as the Board may decide and direct. Special committees shall be considered discharged upon completion of the purpose for which they were appointed and after their final report is made to the Board.

The President of the Board shall appoint the chair and all members. When appropriate, non-Board members may also be appointed as members. Each committee shall consist of at least two trustees and the President acting ex-officio.

### **EX-OFFICIO COMMITTEE MEMBERS**

The President of the Board shall be an ex-officio voting member of all committees. The Director or the Director's delegated representative shall be available as a resource to all committees.

### **GUIDELINES FOR COMMITTEE CHAIR**

The committee chair shall be expected to lead the committee just as the President is expected to lead the Board. The committee chair is accountable for ensuring the productivity of the committee by:

- Planning the agenda for the committee meetings;
- Ensuring that all members of the committee are notified of committee meetings;
- Convening committee meetings and keeping them on track;
- Appointing a member of the committee to keep a written record of committee actions;
- Encouraging the committee to take action on the issues discussed by the committee;
- Ensuring that reports and recommendations for action from the committee are presented to the full Board;
- Leading the committee to evaluate its own operations.

## **DUTIES OF COMMITTEE MEMBERS**

### **General Duties**

Duties of the members of individual Board committees shall vary, but certain basic responsibilities remain the same for all committees. Those responsibilities include:

- Attend all meetings of the committee to which the Board member is assigned;
- Prepare for committee meetings by studying the agenda and researching issues to be discussed at committee meetings;
- Actively participate in discussions at committee meetings;
- Follow through promptly on any assignments for the committee;
- Support committee recommendations before the full Board.

No committee shall have other than advisory powers unless, by suitable action of the Board, it is granted specific power to act.

### **Executive Committee**

The Executive Committee shall consist of the officers of the Addison Public Library Board. This committee shall meet as necessary to prepare issues to be presented to the full Board and/or to make emergency decisions on behalf of the Board when it is not possible to assemble a quorum of the Board. This committee shall have no power other than emergency action or other powers that full Addison Public Library Board may delegate to it from time to time.

### **Standing Committees**

The Finance Committee shall have the following responsibilities:

- Approve the assumptions for the preparation of the operating budget, review the complete budget, and recommend a budget to the Board;
- Monitor the library's fiscal performance prior to submission of reports and recommendations to the Board and recommend action as needed;
- Determine the financial appropriateness of expenditures and recommend for approval those expenditures in accordance with prevailing policies and procedures;
- Review and recommend to the Board matters dealing with insurance.

The Policies and Planning Committee shall have the following responsibilities:

- Review library policies related to the use and selection of print and audiovisual materials, patron behavior, etc.;
- Function as a liaison with various community groups and residents to communicate effectively community needs and library direction.

The Personnel Committee shall have the following responsibilities:

- Annually review salary pay scales, salary budgetary increases, job descriptions, and fringe benefits;
- Review employment practices and recommend action as needed;
- Assist the Board in evaluating the Director.

### **Special Committees**

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## **SECTION VI**

# **FINANCE**

## **ROUTINE BILL PAYMENT**

At each regular meeting of the Board of Trustees, routine bills are presented for consideration and approval by the Board. The Board of Trustees authorizes the payment of certain invoices to regular vendors (e.g. utilities or insurance) prior to the board meeting, subject to the Library Director's approval, primarily in order to avoid incurring fees for late payment. Any bills paid prior to the board meeting shall be reported at the next subsequent board meeting and ratified by the Board as part of the consent agenda.

Funds may be disbursed for goods and services by check or other electronic payment.

If a quorum of the Board is not available or a regular monthly meeting is cancelled, the Finance Committee (a standing committee under Article V of the Addison Public Library By-Laws) is delegated the authority to meet to review and authorize payment of all routine bills that are within the Budget, and not exceeding it. The full Board will ratify such payment at the next regularly scheduled meeting of the Board. In such cases, the Finance Committee (a standing committee under Article V of the Addison Public Library By-Laws) will schedule a meeting in compliance with the Open Meetings Act.

## **USE OF LIBRARIAN'S CHECKING ACCOUNT, PETTY CASH, AND CREDIT CARDS**

### **Librarian's Checking Account**

The Board has established a librarian's checking account, which is funded at a maximum of \$2,000 ~~\$1,000~~ to cover expenses that require payment before the next regularly scheduled Board meeting. Such expenditures include professional growth activities, programming materials,

purchases of coins for the cash registers, refreshments for meetings, etc. Checks to be written must be approved and signed by the Director as well as being under \$500 each. The Board of Trustees shall review these activities posted in the All Disbursements Report monthly and reimburse the account so that it is funded at ~~\$1,000~~ \$2,000.

## **RECOGNITION AND REWARDS**

The Addison Public Library acknowledges that as a public entity, it must be a steward of the public funding it receives and ensure that the expenditures of Library funds are consistent with its statutory authority, which includes the establishment, maintenance and operation of a public library; as well as the performance of activities necessary for conducting library services.

The Library also recognizes the invaluable contributions made by its staff, volunteers and supporters, and recognizes that maintaining the morale of staff and volunteers is a necessary component to its success. The Addison Public Library hereby finds that maintaining the morale of its staff and volunteers is necessary for conducting library services. For these reasons, the Addison Public Library adopts this policy. No gift shall be provided to employees, volunteers or library supporters contrary to this policy.

Employees - Based on available funding in each budget cycle, the Board of Trustees will allocate funds for staff recognition designed to create a positive work environment for employees, increase employee performance, engage employees, and improve employee morale. Funds may be allocated for library-wide and/or department level recognition, including peer-to-peer recognition.

Employee Service Awards - In December of each year the Library recognizes employees based on their years of service at the Library. Each employee who has completed five years of service at the Library (or an increment of five years) in that calendar year is recognized at the Library staff recognition event with a certificate of appreciation and a gift. Funds for these awards shall be paid from the budgeted funds of the Library. The Library shall determine the type of gift to be given. Gifts of cash or gift certificates will be avoided because such gifts are taxable income.

~~Employee and Employee Team of the Year Awards - The library staff will annually select one individual and one staff team to be recognized as *Employee of the Year* and *Team of the Year* who have given exemplary service to the Library and its users. These awards will be presented at a staff appreciation luncheon held each year during National Library Week. Funds for these awards shall be paid from the budgeted funds of the Library. The Library shall determine the type of gift to be given. Gifts of cash or gift certificates will be avoided because such gifts are taxable income.~~

Volunteers - Recognition is an important component of the Addison Public Library's volunteer program. The Library recognizes that volunteer services are a necessary component to providing an adequate level of service to library patrons. Although individual, informal recognition of volunteers may occur on a regular basis, it is important that the Library formally recognize volunteers as a group on a regular basis, at least annually. It is the policy of this Board to formally recognize volunteers. It shall also be the policy of this Board to formally recognize volunteers and

library supporters who have given extraordinary service to the Library by approving resolutions of the Board commemorating such service and dedicating books in the Library's collection in honor of these individuals.

Retirement - The library will not give gifts of cash or tangible personal property to employees upon retirement. Employees with ten or more years of service to the library will be recognized upon retirement by a formal resolution from the Board. All employees will be recognized upon retirement with a book to be placed into the library's collection in their honor.

Trustees - Trustees serve without any expectation of compensation in accordance with state statute, however, upon retirement the Board may decide to recognize an individual trustee at its discretion.

All recognition awards are at the discretion of the Board and based on available funds, staffing levels, and the needs of the Library. Programs and awards may be discontinued at any time with no expectations of grandfathering clauses.

# **BOARD BYLAWS**

## **Article IV - Meetings**

### **Section 4: Annual Meeting**

The annual meeting shall be held in May, ~~at which time the Library depository and related signatories shall be designated.~~

## **Article V - Committees**

### **Section 2: Standing Committees**

For all standing committees, the Library Board of Trustees shall function as a committee of the whole. The standing committees shall be as follows:

- Finance
- Facilities
- Policies
- Strategic Planning
- ~~Policies and Planning~~
- ~~Personnel~~

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# **BOARD POLICIES**

## **SECTION I**

# **INTRODUCTION**

## **AMENDMENT OR SUSPENSION OF POLICY**

Illinois Statutory law requires the Board to establish and review at least biennially a written policy for the selection of library materials and the use of library materials and facilities. Policies will be considered for their accuracy and appropriateness, and recommendations will be made to the Board for amendment, addition, or elimination. Except as otherwise provided by law, any policy of the Board may be suspended, repealed, amended, or waived by a majority vote of the Board, ~~provided that at least two full weeks advance notice has been given of the intention to consider revocation, repeal, waiver, or amendment.~~

## SECTION II

# BOARD ORGANIZATION

## ANNUAL MEETING

There shall be an annual meeting of the Board held in May of each year. At this meeting the Board shall elect officers for the new fiscal year.

The following resolutions shall also be approved:

- Resolution authorizing transfer of amount without increasing the total appropriation for the preceding fiscal year;
- Resolution comprising statement of financial requirements of the library for inclusion in the appropriation of the corporate authority for library purposes for new fiscal year and statement as to accumulations and reason therefor;
- Resolution amending building plan, providing for accumulation of funds, and authorizing expenditure from reserve fund for building purposes.

~~In addition, the Board shall examine the preceding fiscal year's annual report and select Board meeting dates as well as library depositories and related signatories for the new fiscal year.~~

## MANAGEMENT OF PUBLIC COMPLAINTS

When a Trustee is contacted by a member of the general public who has a concern or complaint about the Addison Public Library or persons within Addison Public Library, the Board member needs to report that communication directly to the Director or advise the person about the formal complaint process. The Board member shall follow these guidelines:

- Remember that individual Board members have no power or authority to speak or act for the full Board.
- Listen to the person's concern;
- Express a desire to reach a satisfactory solution;
- Explain that the Board and management have established a process for handling concerns, which starts with the person most immediately responsible. Suggest that the concern be discussed with the person immediately responsible;
- ~~Refer public complaints to the official complaint forms~~ **Recommend that the person fill out a patron comment card or a Statement of Concern form, which are available at the library public service desks or email the Library Board and/or Director (addresses posted on library's website).** ~~to the link to the Board of Trustees on the library website. One form is for dealing with challenged materials; the other is for all other issues;~~
- Inform the Director of the complaint or concern.

Guidelines for Processing Public Complaints are outlined in Public Services Policy 8.3, Question or Complaint about Library Policies and Procedures.

~~From time to time situations may occur that create legitimate complaints on the part of the public or constituents relative to the Addison Public Library. Complaints must be aired so that all sides of the issue may be heard and a rational procedure/solution found.~~

~~Anyone having a complaint, therefore, is encouraged to file a complaint. Forms are available at all public service desks in the library. The person originating the complaint must sign all complaint forms. The nature of the complaint should be stated as well as the relief sought.~~

## ~~Process for Dealing with Complaints Other Than Challenged Library Materials~~

- ~~1. The complaint form shall be filed with the Director.~~
- ~~2. Where appropriate, the Director shall refer the complaint form to the relevant Department Head.~~
- ~~3. The Director will secure a resolution or response to the complaint.~~
- ~~4. The Board will be informed about the complaint and the proposed remedy.~~

~~[See Materials Selection Policy for process for dealing with challenged materials.]~~

### SECTION III

# BOARD MEETINGS

## MEETING AGENDA AND INFORMATION PACKET

All matters to be considered by the Board at the meeting shall be included on the agenda. All informational materials needing to be reviewed before the meeting will be posted on a secure online repository four days prior to the meeting. The Addison Public Library Board meeting agenda shall approximate the following outline:

- Opening Items
  1. Call to Order
  2. Roll Call
  3. Pledge of Allegiance
  4. Approval of Agenda
  5. Comments from the Public
- Financial Report by Treasurer
- Consent Agenda

1. Minutes
2. Treasurer's Report
- Reports
  1. Director and Staff Reports
  2. Friends of the Library Report
  3. Monthly Statistics
- Unfinished Business
- New Business
- Closed Session – if needed
- Correspondence and Announcements
  1. Libraries in the News
  2. Other Correspondence
  3. Monthly Statistics
- Additional Discussion
- Adjournment

## PUBLIC COMMENT

The Board of Trustees of the Addison Public Library welcomes comments from the public and will hear from any interested individual who wishes to address the Library pursuant to the guidelines outlined in this policy.

Public comment at meetings of the Library shall be restricted to civil discourse, free from disparaging remarks or inferences toward any person or organization. Speakers who fail to observe this protocol will be ruled out of order. The individuals appearing before the Library are also expected to follow these guidelines:

1. Members of the public may address the Library only at the appropriate times as indicated on the agenda, and when recognized by the Board President or meeting chair.
2. Individuals are expected to identify themselves by full name. Individuals are also requested **but not required** to provide their address.
3. The time allowed for each individual to speak shall be limited to 3 minutes. A speaker may not cede time to another speaker.
4. No more than 20 minutes shall be allowed for public comment at each meeting.
5. There shall be no expectation of immediate response on any matters raised during public comment. The Board may, however, refer any matter of public comment to the Library Director, Library staff, another appropriate individual or agency, or may place the matter on a future meeting agenda for reply.
6. The Board President or meeting chair shall have the authority to determine procedural matters regarding public comment at Library meetings not otherwise defined in Board policy.

## SECTION V

# COMMITTEES

### **COMMITTEE PURPOSE**

It shall be the purpose of any committee appointed by the Addison Public Library Board to assist the Board of Trustees in governing more efficiently and effectively. A Board committee is not designed to do staff work. Committees shall be used to investigate, deliberate, and analyze special issues on behalf of the Board.

### **COMMITTEE ACCOUNTABILITY**

Any committee established by the Board shall have only the powers specifically delegated to it by the Board. Functions of each committee shall be in writing as part of Board policy or recorded in the minutes of the meeting that the committee was established.

Committees are a subsidiary of the Board and shall be expected to report their work to the full Board on a regular basis. Each committee shall be expected to make recommendations to the Board for action in the form of a motion at a full Board meeting.

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## **SECTION VI**

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## DIRECTOR'S REPORT – NOVEMBER 2024

**PERSONNEL** – Like all supervisors at APL, I have been busy working on annual performance reviews this month. I have eight staff who report directly to me (4 Department Heads & 4 Admin Dept. staff members) and am working on evaluation documents for each of them. I've completed the actual evaluation meeting and discussion of goals for the new year with four of them and will finish up the remaining ones soon.

While we did enjoy a few weeks of being fully staffed, we have received another staff resignation. Angela Caringella, part-time Adult Services Specialist, has accepted a full-time position at the Elmhurst Public Library. I am thrilled to see her moving forward in her career. She was still in graduate school, working toward her master's degree when we hired her, and we knew this time would come eventually, but she will definitely be missed. Laurie (HR) and Lesley (Head of AS) are in the process of interviewing candidates to fill this vacancy now.

All staff completed their annually required harassment training and training on bloodborne pathogens in November. **Reminder – board members also must complete the harassment training. Only 3 of you have completed it so far. If you have not already done it, please do so by the end of the year!**

**LEVY HEARING** – Chris Pudelek joined me at Village Hall on Monday, December 2 for the public hearing and the first reading of the tax levy before the Village Board. At the public hearing, Colleen Witt, Director of Finance for the Village presented the Village's tax levy, which is a combination of the corporate fund, debt service, and their police pension fund. They were presenting a 4.81% overall increase in their portion of the levy. Then, I presented the library's portion of the levy, reporting that the Library Board of Trustees voted to keep the levy flat for 2025, requesting the same amount as 2024's extension, which will likely result in a lower tax rate for the library's portion of the tax bill as a result of the projected increase in the EAV. There were no questions from the public or from the Village Board.

**STAFF PRESENTATION** - I had the privilege of attending the [DuPage County Continuum of Care](#) quarterly meeting in Downers Grove this month. The Continuum of Care is a collaborative group of all of the non-profit organizations and government agencies in DuPage County that are involved in addressing issues of housing insecurity and homelessness in the county. I was invited to attend because two of our staff, Head of Adult Services Lesley Cyrier and Social Services Specialist Yesenia Benavidez were guest speakers at the meeting. They provided an overview of our community demographics and Yesenia's role at our library. They did a great job of illustrating how her role is one of information and referral in the same way that our librarians are, except that her area of specialization is in social services. In fact, she has, in the course of her work, referred patrons to most of the agencies who were present at the meeting, and familiarity with their work is an essential part of her job. When a patron comes in, she needs to know which agencies might have specific programs for veterans, or for seniors, or for immigrants. She also needs to know what documentation a patron might need to seek services from various agencies - proof of address, proof of income, proof of legal immigration status, etc. and how the patron can seek their services -by appointment, by completing a paper or online application, only with a

referral, or perhaps just by calling or walking into that agency's offices, etc. It's unfortunate that there is no single agency that can meet all the needs of every patron. And sometimes a single patron may need multiple referrals – one for health care, one for housing, one for legal assistance, one for substance abuse, one for childcare, etc. We are fortunate that there are so many agencies addressing the many social service needs of people in our communities, but the network of agencies and how to access their resources can be very daunting to someone who is already struggling, and being able to meet with someone at the local library who can help those in need know where to turn and how to navigate the various systems to receive the help they need is an important service we can offer. It is also just an extension of what our librarians do for people seeking information on any topic – how to start a business, how to apply for college financial aid, how to research their family tree, how to learn more about a medical condition, etc. This is our mission. Lesley and Yesenia were excellent presenters, and it was very gratifying to have the opportunity to join them as they shared this overview of their department's work with all of these partner organizations.

**BUILDING PROJECT** – We held most of the public bid openings on Tuesday December 3 and then had the last one a week later on Tuesday December 10 for structural steel. Work is scheduled to begin on Monday January 13, which means we need to have the entire 3<sup>rd</sup> floor emptied by that date. 3<sup>rd</sup> floor staff are working diligently at cleaning out files, packing up desks, and developing plans for how we will work remotely from the large meeting room on meeting room tables instead of desks for the next five months. Brooke developed a layout that we tested out on 12/5 which proved that we will all fit, but it is going to be a tight squeeze to provide everyone the space they need. I've also been communicating with the moving company and BOS, the firm that will disassemble and store our workstations, to be sure we are all on the same page and have a plan in place for this initial stage of moving. Donna has been working with the accountants to develop a plan for how (and where) they will work. Brooke and Louise have worked out a plan for converting the Children's Program Room into our temporary staff break room. I also met John Barrett this month. John is the FQC Project Manager who will be on site every day overseeing the contractors' work throughout the project. He has been spending time this month getting more familiar with our building layout and where various things are located so that he will be ready for the project to begin. And I'm pleased to report that we have received our building permit from the Village. Technically, we have conditional approval of the permit, due to some outstanding items such as providing a copy of the plumber's license, which will be done as soon as the contracts are awarded. There are a lot of moving parts to pull everything together, but with careful planning, I am confident we will be ready, and it's exciting to know that this project we started back in 2021 is finally getting off the ground.

# CHILDREN'S SERVICES – NOVEMBER 2024

## SNAPSHOT

- On Nov. 2, local author Samia Khan did a read aloud of her book entitled *Salaam, World!* and patron Zahawa Saleh read the title *Sister Friend* by Jamilah Thompkins-Bigelow. The event drew a substantial crowd, and participants enjoyed creating cards after the stories.
- Local artist Krystyna Jaroc came on Nov. 12 to do a Fall Craft program to celebrate the season.
- Betsi planned and presented a Turkey Day Crafts program on Nov. 18, which was well received by both children and their caregivers for the variety of crafts she had available for families to do.
- On Nov. 25 we hosted the DuPage Children's Museum (DCM) Pop-Up, which featured pop-up exhibits from DCM, a sensory station by NEDSRA, and information and resources from APPLE, Parents as Teachers, WIC, the DuPage All Our Kids Early Childhood Collaborative, and Early Intervention. A huge thank you to APPLE for helping organize the event and providing the funding for DCM to come to the library.
- Also on Nov. 25, Betsi hosted the NEDSRA Fall Break Camp participants, and did a storytime and craft activity with the group.



## STATISTICS

Children's Programs: 29 programs, 735 participants

Multigenerational Programs: 1 program, 21 participants

Asynchronous Programs: 11 programs; 613 participants | Appointments: 14 | Continuing Education: 26.5 hours

Reference Questions: 199 | Scan/Fax Questions: 62 | Directional Questions: 83 | Teacher Resource Room: 7

Book Displays: Native American Heritage Month, Veteran's Day, Celebrate Diwali, If You Like ... *Jo Jo Makoons*.

## TEEN SERVICES – NOVEMBER 2024

### SNAPSHOT

We hosted 13 classes (224 students) from Indian Trail this month. 6th grade classes went on a tour, discussed the upcoming renovation, and signed up for library cards. 7th and 8th grade classes listened to book talks, got personal recommendations, and checked out their favorites. We will continue to offer visits throughout the school year.

Alé's Dungeons and Dragons program became so popular that we decided we needed to split the group in two. The group of over 20 players made it difficult for everyone to focus and it was apparent that kids wanted different things out of the club. Alé will continue to run a smaller group using the traditional Dungeons and Dragons rules, while Courtney is running a less traditional and more flexible roleplaying game. Whichever style teens prefer, they'll still get the essentials: an opportunity to cultivate their imaginations, their creativity, and their storytelling skills.



A teen was working on getting their library card for several days and finally got it just before closing on a Friday. He went around to every desk to show it off and told us, "I finally got my library card. The power.....!"

A student we regularly work with on their homework brought in a creative writing assignment they completed for school. In the story, a student with undiagnosed ADHD struggles in school. They feel alone in their challenges completing homework and misunderstood by both teachers and other teens. But then they go to the library where the librarians are supportive and understanding. The librarians help the student focus and show them how to work with their ADHD. The story ends with the student graduating and getting into college. We're touched by this sweet portrayal of the TS team and are confident the student will get the happy ending they've worked so hard for.



# GUEST SERVICES – NOVEMBER 2024

## SNAPSHOT

In 2024 Guest Services staff had the goal to learn to be a library advocate. Each associate reviewed the Ready, Set, Advocate Toolkit from ILA and watched modules 1, 2, and 3. At our Staff Development Day in August everyone who was able to attend participated in Ready, Set, Advocate into Practice to give some practical skills for advocating for the library, taglines, and go to statements to bring it back to APL's values. Kathy met with those who were unable to attend, to review what was discussed. Each Guest Services Associate had to provide 2 examples of advocating for the library.

Here are some examples:

One-person shared libraries are for everyone by letting a patron know we have home delivery and that the patron's neighbor can sign up for that.

Another person shared that we welcome all viewpoints here and that parents have the right to teach their children what they wish just as the patron does. This patron had an issue with certain books in the children's section.

Another example is libraries are for all ages, when a patron was asking how old a child had to be to get a library card.

Advocacy has occurred when staff were walking their dogs and at the store, besides just in the library.

## STATISTICS

In November there were 3 curbside pickups.

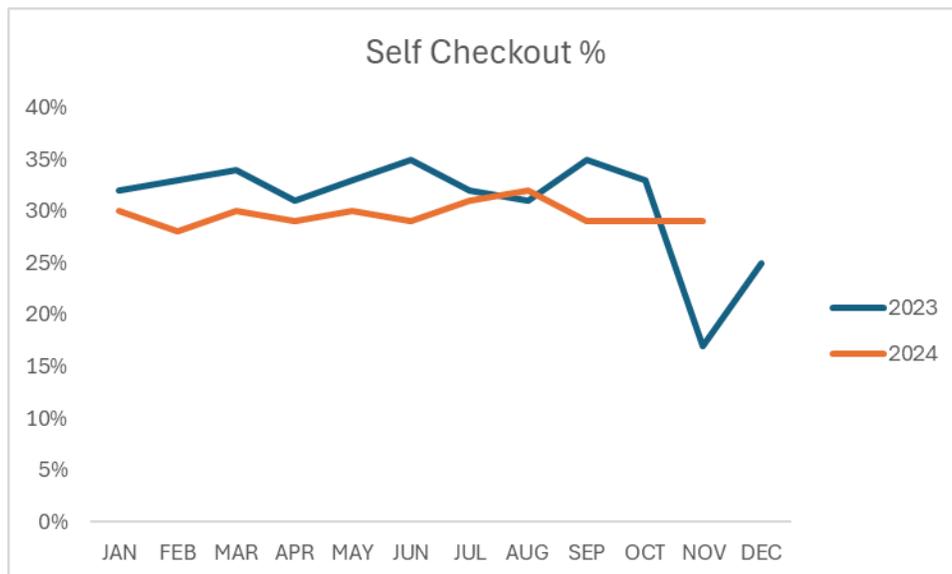
1 overdue item was found on shelf that had not been checked in.

15 non-SWAN ILLs were checked out by patrons.

7 non-SWAN reciprocal borrowers were registered.

Guest Services staff completed 17.75 hours of Continuing Education.

Kathy completed 13 notarizations.





# MATERIALS MANAGEMENT – NOVEMBER 2024

## SNAPSHOT

All staff completed the required annual training on Workplace Harassment and Bloodborne Pathogens. Staff also completed their annual staff input form, which will help complete performance annual evaluations.

Jenny and Karen are looking through department budget lines as a mid-year review to ensure we are on target with spending.

## PROJECTS

Stef worked on a Cozy Meals display featuring stews, soups, and chili cookbooks, and a Writer's Workshop display in honor of Author's Day November 1st. She also collaborated with Ana on Iniciar una Serie display and her endcap displays were Authors' Stories and Instapoets.

Jenny and Karen are wrapping up with the AMH Committee as a recommendation will be made for the new AMH machine.

Karen worked with the Gale representatives to get a trial for Gale Presents Petersons Test and Career Prep and Gale Business Insights. After the trial, the databases were purchased and made available on our website.

Sue continued to count shelves and look for the best locations for collections post renovation.

Paul will be working on a reclassification project on our world music CDs next month.

Jenny worked on updating passwords to department applications, software, and online subscriptions as it is required to update these passwords annually for security reasons.

Karen and Jenny worked on revising and updating all the Materials Management job descriptions as part of an annual review. Updates and changes are then passed along to HR to be finalized.

Hooriya worked on weeding jSPANISH and the adult nonfiction 700s. Kevin worked on a report on locating items that are marked missing. Johnny helped Adult Services test out an adult Dungeons & Dragons program, and Carly shifted large type fiction and large type romance.

## STATISTICS

MM staff completed **36** hours of CE.

MM staff added **1,362** items.

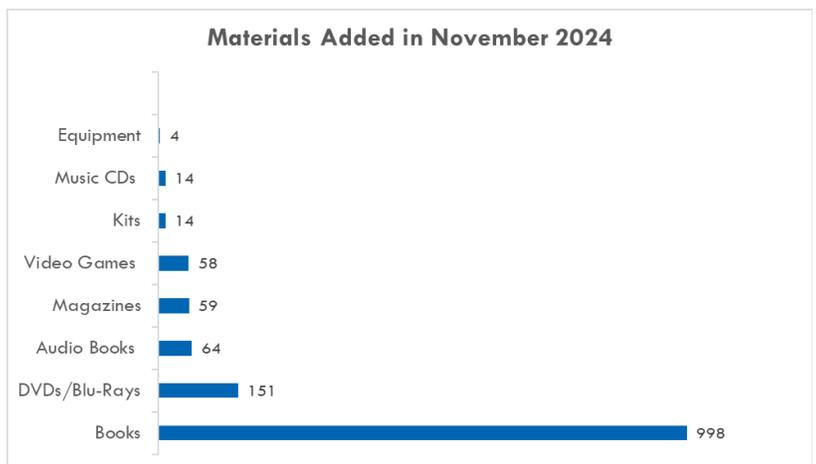
MM staff withdrew **1,673** items.

Library Aides shelved **268** carts.

APL patrons borrowed **22** items from other libraries through interlibrary loan.

- Average time patrons had to wait for item to arrive through OCLC: **6.3** days.

APL sent **157** items to other libraries through interlibrary loan.

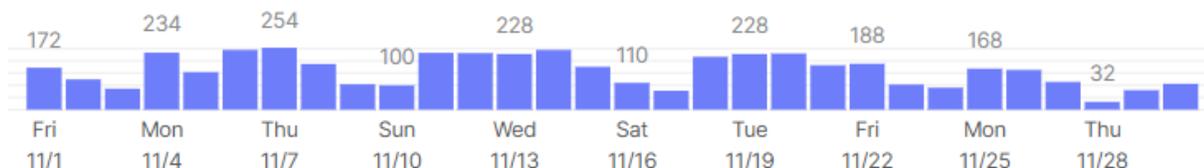




# IT SERVICES – November 2024

## SNAPSHOT – Library WiFi Usage

### Clients per day



## PROJECTS

### The IT Services Associates

- Answered a total of 651 patron questions, a 4% increase from last month.
- Tested the Dungeons and Dragons program for Adult Services.

### The Creative Services Coordinator

- Launched a new library website on November 7, with webform and Google Analytics data exported.
- Hosted 5 in-person programs and 2 passive activities. Sublimation classes and the “How to Record Oral History” classes were the most popular, with 5-6 attending each class. The “How to Record Oral History” class connected to our Strategic Plan for promoting creator and patron-created content. It was in partnership with Adult Services who offered other genealogy classes.

### The IT System Administrator

- Addressed 32 IT tickets, a 7% increase from last month.
- Set up AutoElevate, an Endpoint Privilege Management, for experimentation.
- Did much work regarding annual password change.

### The Head of IT Services

- Cleaned up the network rack in the Electrical Room, replacing and labeling cables.
- Changed the local admin password for patron PCs in the general computing area.
- Planned for network switch consolidation in preparation for building renovation.

## Continuing Education

All IT Services staff members completed the annual Blood Pathogen and Workplace Harassment training.



# ADULT SERVICES – NOVEMBER 2024

## SNAPSHOT

The theme for November in Adult Services was presentations!

On November 1, Yesenia participated as a panelist for the LACONI Recharge Serving Patrons in Unique Circumstances program. Yesenia along with other library social work professionals shared insight and best practices around the work they do. Later in the month Lesley, Ana, and Elizabeth had the opportunity to attend the Library Board meeting and discuss the wide array of services Adult Services offers focused on English Language Learners. The highlight was watching videos of patrons and volunteers sharing the impact these services have had on their lives. Finally, Yesenia and Lesley presented at the DuPage County Continuum of Care (CoC) Fall meeting. The CoC is comprised local non-profit agencies who work together to “develop and support effective strategies to end homelessness in DuPage County.” Yesenia and Lesley provided insight into the Addison community and discussed the important role that social workers in libraries play.



*Yesenia and her fellow panelists at the LACONI program*

Elizabeth presented two programs in November on using library genealogy resources, one on Ancestry Library Edition and the other on Fold3 and Heritage Quest. Attendees were so excited about this series, that they came to the library on their lunch breaks from work to attend! Everyone enjoyed the programs and discussing their current genealogy programs so much, that in 2025 Elizabeth will begin a monthly genealogy club.



November was also Novel Writing Month at APL! Angela and Sophia helped Lesley to put together starter packs that included supplies, inspiration, and resources to get patrons ready to write. As part of this theme, COD English Professor Jason Snart also presented on Artificial Intelligence & the World of Writing on November 9<sup>th</sup>.

### Success Stories

After discovering that there were not enough large type books for a Clarendale book discussion, Sara talked to the residents about other options. She successfully convinced a patron to try Cloud Library. With another resident’s eager assistance, the patron signed up for Cloud Library. They said it was easy, and now they won’t have to hold a heavy book!

A patron came to the reference desk looking for help with an assignment for their college speech class. Megan helped the patron use JSTOR to find academic sources for the speech, read through the assignment requirements with the patron to ensure they were following their professor’s instructions, and worked with the patron to organize the content of the speech so it flowed well. The next week, the patron came back to the library and reported that the speech went well!

Following one of November’s meditation programs, a patron submitted the following comment. “Jodi outdid herself today. Best Meditation session yet! Jodi has a wonderful way of building upon our growing knowledge while seamlessly integrating new people into our growing group. We look forward to each session and wish we could attend weekly!”

Angela led a Microsoft Word class on November 19 and a patron submitted the following comment after the class. “I was very satisfied. Didn’t think I would learn so much in an hour but I did! The trainer Angela was an excellent trainer. Spoke clearly, slowly & was very patient. I learned so much. Thanks Angela.”



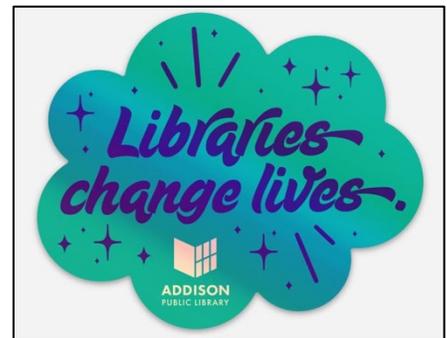
*First DND for adults program*

A patron who attended Dungeons & Dragons for Adults told Sophia that she had heard of D&D from watching Bing Bang Theory, and she wanted to see what it was all about. So, she signed up for the program! She was a great learner and picked up the game easily.

# COMMUNITY ENGAGEMENT NOVEMBER 2024

## SNAPSHOT

- Community members familiar with our pop-up library events were excited to welcome Patti back and meet Natalie, the newest member of Community Engagement.
- The new website officially launched on November 7! After launch we received a very positive chat: "CONGRATS! your newly redesigned website looks beautiful and enough contrast." Samantha & Sarah (IT) did an amazing job!
- Matt has joined the planning committee for Addison Connect, a networking group of area business owners. Matt met with members of Century 21 Circle, Muggs-N-Manor, and Addison Bank and Trust to discuss the first event and plan the next event on Tues., Dec. 3.
- Samantha attended the 10<sup>th</sup> annual Library Marketing and Communications Conference. She found the *From Brand Guides to Wayfinding and Websites: Creating Consistent Customer Experiences* session very informative and has begun applying what she learned to our Jan/Feb newsletter!
- Patti put on her hiking gear and led the memory care group at Clarendale through an adventure as she read about the U.S. National Parks!
- The first ever puzzle competition was a success! Gaby, Samantha and Natalie could feel the excitement in the room as the teams approached the finish line. The fastest team to complete the 300-piece puzzle did so in under 17 minutes – the average completion time was 45 minutes.

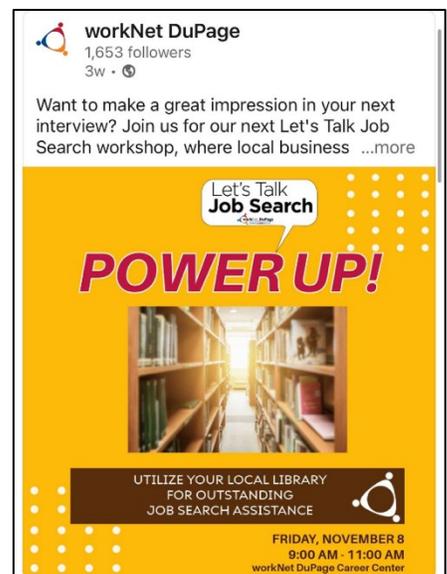


## PROJECTS / COMMITTEES

- **Small Business Saturday:** For the 6<sup>th</sup> year in a row, the library participated in the AMEX Small Business Saturday campaign as a Neighborhood Champion. This year, 11 Addison businesses took part!
- **Building Project Open House:** The Open House on Nov. 10 was a great success! It was awesome to see so many community members, local officials, and families excited about the library's upcoming changes.
- **Pathways to Success:** Now that Matt & Ana have confirmed their location and presenter, they are working on the finer details for the curriculum, such as getting books and materials.

## STATISTICS

- The CE department connected with **117** community members at **6** outreach events!
- Number of New Job Toolkits distributed: **12**
- **15** one-on-one appointments with Job Seekers & Business Owners.



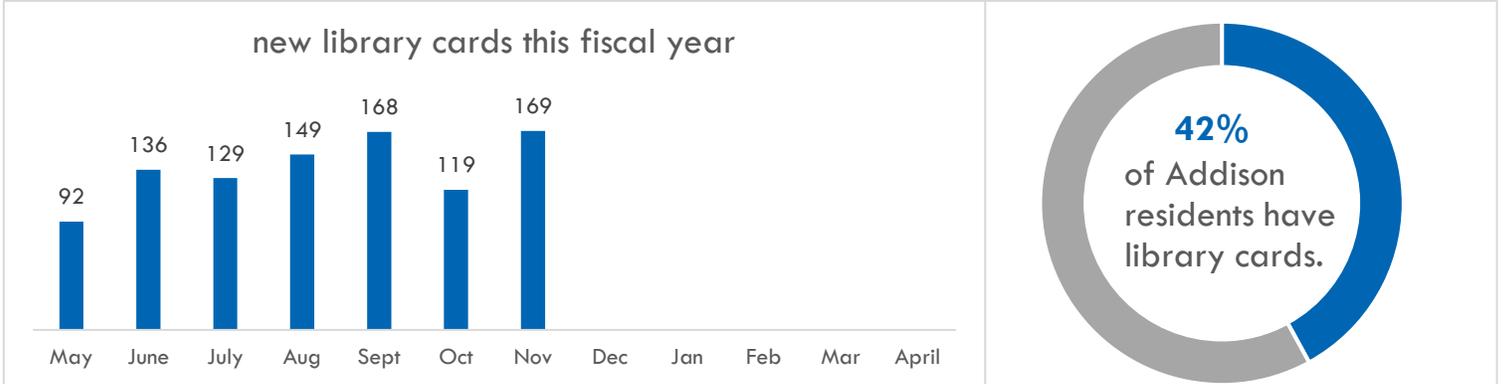
From Top to Bottom: Patti & Natalie at the REC Center; Design for the new holographic library stickers; Facebook post from workNet DuPage promoting a presentation by Matt.

# November 2024 Library Usage Report

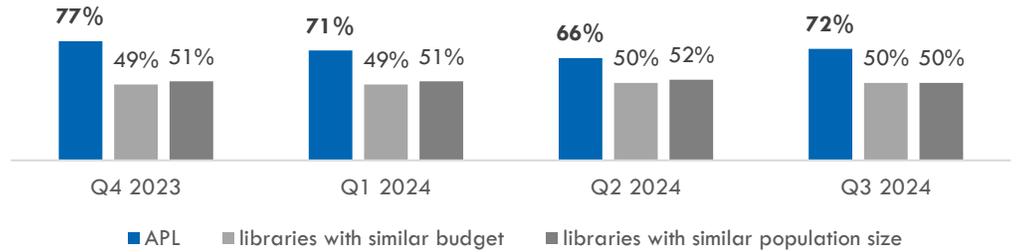


## Library Cards

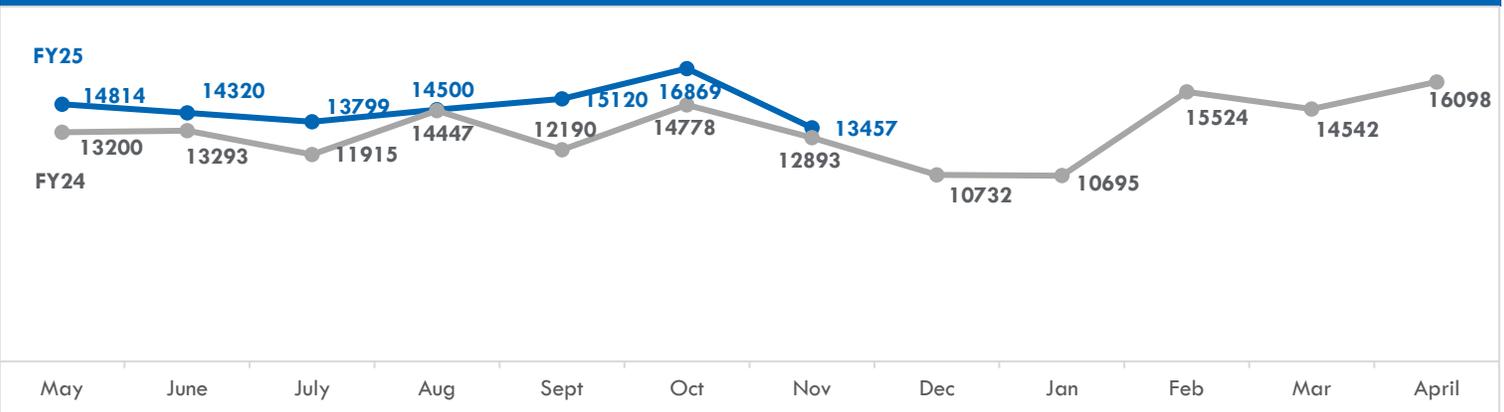
169 new library cards this month.



percentage of new cardholders who signed up between 12 and 24 months ago and actively use the library

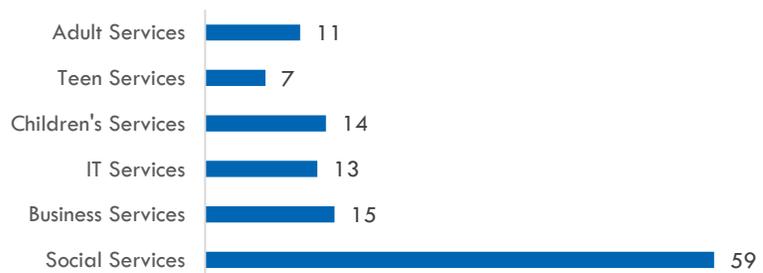


## Library Visits



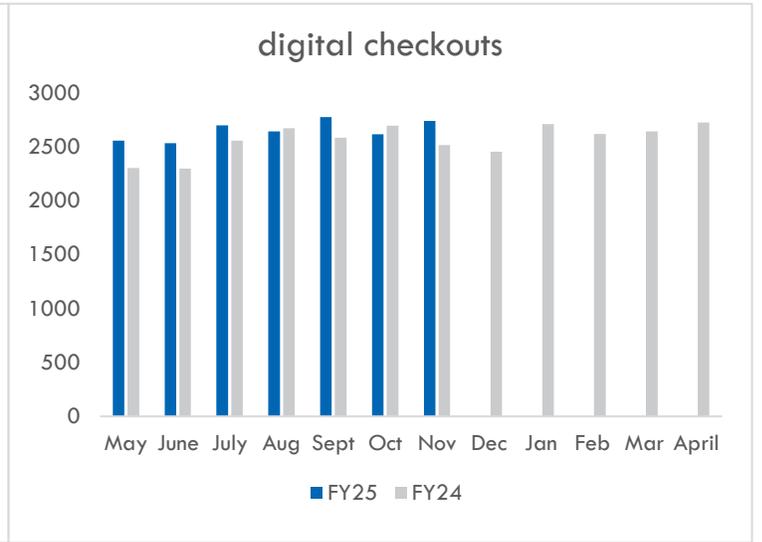
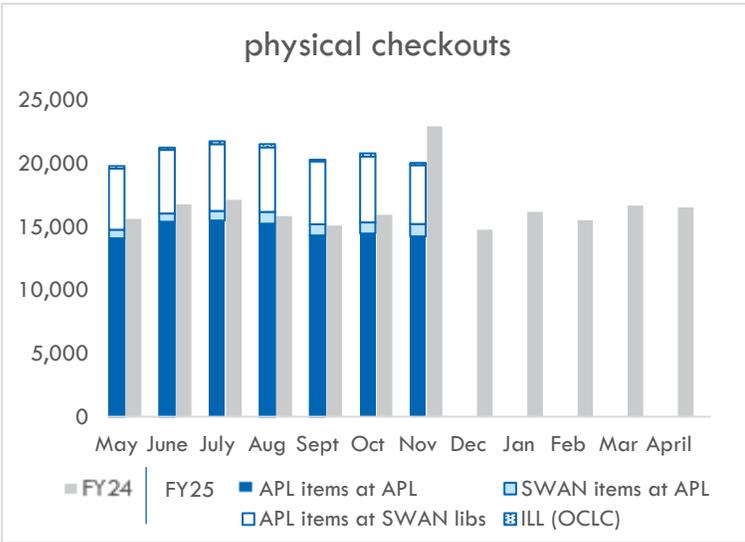
## 1-on-1 appointments

- 119 1-on-1 appointments
- 2180 computer logins
- 1023 wifi sessions
- 55 large meeting room bookings
- 700 study room bookings
- 7 Creative Studio bookings
- 45 Sound Studio bookings

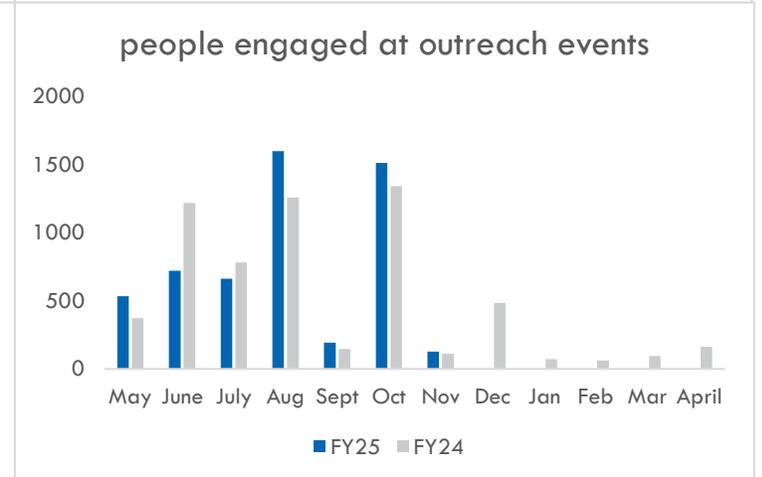
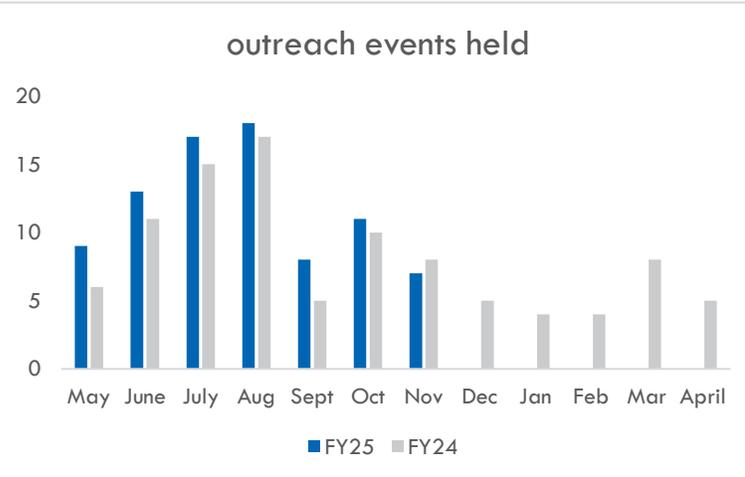
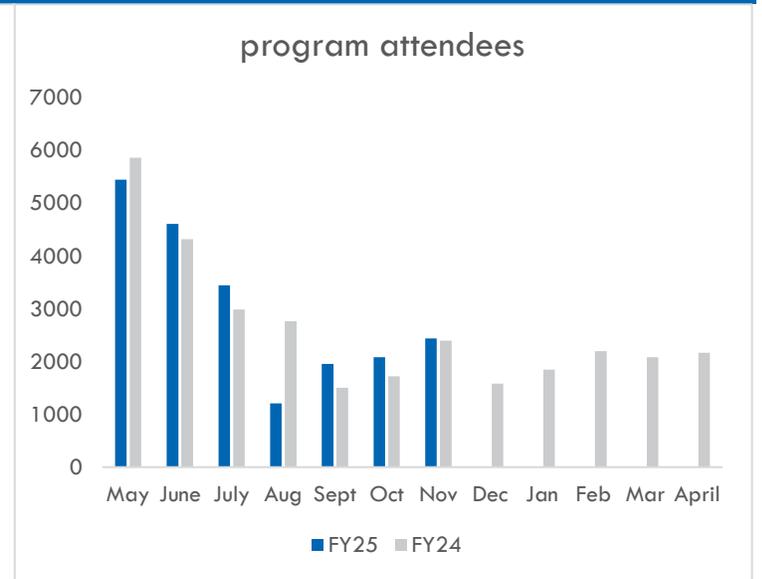
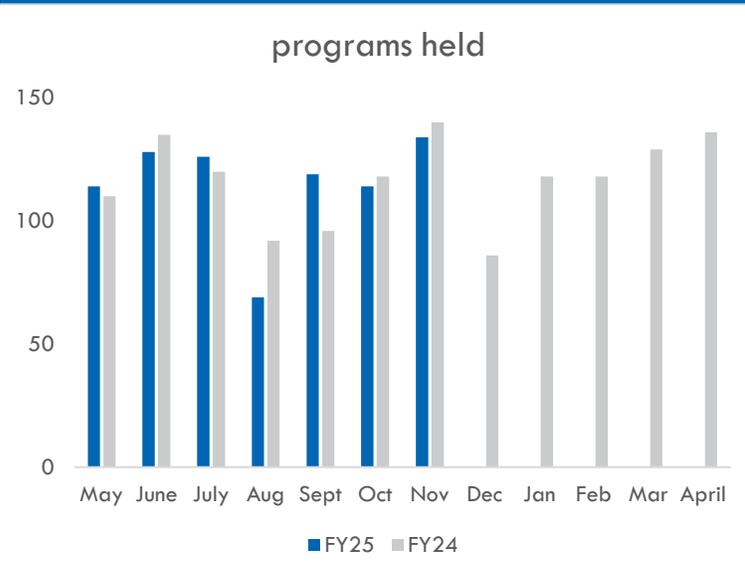


# Circulation

22797 total checkouts this month



# Programs & Outreach





### Meetings

- 11/14: Brooke and Greg C. attended the pre-bid meeting and helped bidders navigate our building, so they could take pictures and ask questions. FQC led the meeting and PA+D staff were also present to answer questions.
- 11/19: Greg C. attended the 2<sup>nd</sup> pre-bid meeting which was available to any bidders that wanted a second look at our space.
- 11/22: Mary and Brooke met with FQC to discuss the project timeline in finer details and look at options for what we can do to condense the timeline.

### APL project work

- November 10<sup>th</sup> was the construction kick-off party!
- 12/5: Third floor supervisors met and worked out a layout for staff workstations while we use the Large Meeting Room as a temporary for four months. Staff from four departments will be sharing the space. It's going to be a tight fit!
- 12/6: Brooke and Louise looked at the Children's Program Room to determine a plan for converting it into our staff lounge for four months.

### Overview of project timeline

- January 2025
  - Large Meeting Room is no longer available for programs or outside groups.
  - 3<sup>rd</sup> floor staff move to the Large Meeting Room starting on Monday, January 6<sup>th</sup>.
  - 3<sup>rd</sup> floor is completely packed and stored by end-of-day January 10<sup>th</sup>.
  - **Construction begins on Monday, January 13<sup>th</sup>!**

### Phase 1 (Jan. – May 2025)

- Large Meeting Room used as a staff workroom
- Children's program Room used as the Staff Lounge
- 2<sup>nd</sup> Floor Program Room closed for ceiling infill
- Silent Reading Room (2<sup>nd</sup> floor) and café (1<sup>st</sup> floor) closed for staircase construction.
- After school snacks will be distributed in the Children's department.
- The Creative Studio and Hive (teen) Program Room will be used for programs beyond their normal scope.

### Phase 2 (June – October 2025)

- Construction begins on the 2<sup>nd</sup> floor.
- Café area and Silent Reading Room areas continue to be closed for staircase construction.
- 2<sup>nd</sup> floor staff move to temporary workspaces in the Board Room and 1<sup>st</sup> floor workroom.



## Friends of the Addison Public Library November meeting report

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The following are notes from the 11/20/24 Friends meeting held in the Adults Programming Room @ 4:00 PM, provided by Patti Gebala, Library staff liaison to the Friends group:

- With four members present, quorum achieved.
- Minutes of the September 18th meeting were approved.
- The official treasurer's report was read and as of October 2024 the balance is \$ 6,825.68; Continuous Book Sales for October \$53.00, YTD \$698.50.
- A \$477 funding request for Spanish-language Summer Reading titles was approved.
- Thriftbooks earnings for October: \$299.24, YTD: \$1,963.03.
- The Friends will look for alternatives to donate books in order to clean out their storage closet by January 1, 2025. Assignments to contact Half Price Books, SCARCE, Polish School in Addison and daycare operations at Community & Centennial Parks were made.
- Since many of The Friends belong to a variety of local book clubs, a suggestion was made that APL try to secure local authors like Shelby van Pelt of Wheaton ("Remarkably Bright Creatures") as a guest speaker, in which they would help with funding.
- Positive feedback was given on the new and improved APL website.
- The meeting adjourned at 5:14 PM, and the next meeting of The Friends is Wednesday, January 15, 2025 at 4PM.

**Translation:** Very friendly, she helps me with everything I need.  
Very helpful, very efficient (Selene)

I really like this library because the people who work here are very friendly and always help me with what I need. I like it because they have people who speak Spanish.

Muy amable, me ayuda en todo lo que necesito, muy servicial muy eficaz, (Selene).

Me gusta mucho esta librería porque las personas que trabajan aquí son muy amable y siempre me ayudan en lo que necesito, me gusta porque tienen gente que habla español.

Let us know how we've served you well, what we should try next, and where we stand to improve. We appreciate your feedback!

I ENJOYED ATTENDING THE ALPHABET-PALOOZA PROGRAM WITH MY 3 YEAR OLD! I LOOK FORWARD TO ATTENDING FUTURE PROGRAMS SIMILAR TO THIS ONE. I AM AN ADVOCATE FOR EARLY LEARNING. LEARNING NEW STRATEGIES TO USE AT HOME, MAKES THESE PROGRAMS A VALUABLE RESOURCE FOR PARENTS AND CAREGIVERS. THANK YOU FOR YOUR DEDICATION TO CHILDREN'S EDUCATION!

Su opinión cuenta, por favor déjenos saber de qué manera podemos ayudarle la siguiente vez que nos visite. ¿Cree que debemos mejorar? ¿Qué programas le gustaría que incluyéramos? Apreciamos su comentario.

Selene es muy amable y atenta con las personas que necesitan ayuda. A todos las personas en este lugar son muy atentas.  
Atentamente.

**Translation:** Selene is very kind and attentive to people who need help. All the people in this place are very attentive.  
Kindly, [PATRON NAME]

Let us know how we've served you well, what we should try next, and where we stand to improve. We appreciate your feedback!

Excellent!  
The two ladies helped me as I was not able to connect with my computer today & had a few minutes to a meeting time. I had no problem last week.

I sincerely appreciate Ana + SaiaA for their help + assisting a rental computer and easing the time crunch to get situated for meeting. They are awesome! 😊 😊

Let us know how we've served you well, what we should try next, and where we stand to improve. We appreciate your feedback!

Just want to say thank you!  
Angela was great! The class  
was very educating for my first  
experience.

You have an  
Excellent Team here

Let us know how we've served you well, what we should try next, and where we stand to improve. We appreciate your feedback!

I LOVE THE LIBRARIANS. R  
VERY HELPFUL AND COOPERATIVE!  
IM FROM ITASCA 1 MILE FROM  
LIBRARY.

Let us know how we've served you well, what we should try next, and where we stand to improve. We appreciate your feedback!

Hello,

I just want to thank Christian at the Computer  
section for always being helpful, friendly, respectful  
and being available to help everyone.  
I am a regular patron at the library and in this  
particular section he is the most helpful to all.  
When others are at this computer section, it is  
not the same. Some are unapproachable, or too  
busy on their phone to notice people need help.  
Thank you Christian for your kindness, patience &  
positive attitude.

Let us know how we've served you well, what we should try next, and where we stand to improve. We appreciate your feedback!

Lucas was very patient and kind with helping me through the computer experience. The reason I called it an experience because I knew nothing about it. He made my experience good and even gave me info on classes. I thank him so much.

Let us know how we've served you well, what we should try next, and where we stand to improve. We appreciate your feedback!

Everytime I come into the library it's such a pleasant experience, especially with Jodi, and her supervisor. Both Jodi and her supervisor should be recognized for their excellent customer service skills, along with their knowledge and being wonderful listeners. Jodi has always been accomodating and understanding with me. Jodi is a great Asset to the Library! Thanks!



## 'Chaotic Timeline:' DG Library Board Slams 'Nonsensical' Referendum

The Downers Grove Public Library Board is asking the village council to delay a vote on the proposed referendum about governance.

Lisa Marie Farver, Patch Staff

Posted Tue, Nov 26, 2024 at 4:51 pm CT | Updated Tue, Nov 26, 2024 at 5:30 pm CT

**DOWNERS GROVE, IL** — The Downers Grove Board of Library Trustees is asking the village council to delay its vote on a nonbinding referendum question that will change the way library board members are chosen. In a letter to Mayor Bob Barnett and Village Council, Library Board President Matt Topic asked that the vote be postponed for a month "to allow us to prepare a report of the impact on our operations, strategic plan, and budget should the referendum go forward."

### "Irresponsible Timing"

The resolution was "introduced without prior notice to the library," per a news release from the Downers Grove Public Library. The referendum proposal was posed Nov. 19 and approved by a 4-3 vote to be considered at the village council's Dec. 3 meeting.

After revision, the referendum asks,

*"Shall the trustees of the Downers Grove Public Library be elected, rather than appointed?"*

In his letter, Topic slammed the referendum's "chaotic timeline" as "unprofessional," "irresponsible" and "contrary to the best interests of our residents."

In a Nov. 23 letter to Barnett, Topic had cited the Thanksgiving holiday and his brief time as board president, pleading with the village council to give the library board more time for research and preparation.

### **"Problematic" Language**

Topic also called the language of the referendum question "problematic" and "nonsensical because we are aware of no legal mechanism to allow for the election of trustees under the existing library structure."

He urged more specificity, writing that "such a change could only take place in the context of specific changes to the legal status of the library, which is not even identified in the referendum and which would introduce a whole host of issues and questions that go beyond the referendum's question."

"To know that a majority of residents prefer an elected board in the abstract tells the Council nothing about whether they want to accept the real-world ramifications of making legal changes to permit it," Topic wrote.

He added, "[T]he current proposed referendum language obscures this by removing the language that appeared in the resolution proposed in the Council's November 12, 2024 agenda, asking whether the library should 'become an independent unit of government.'"

The question, before revisions, had appeared as follows:

*"Shall the Downers Grove Public Library become an independent unit of government, with its own levy and a separately elected library board of trustees chosen by and directly accountable to residents of the community?"*

Topic wrote that the "significant" change in the language "demonstrates the complexity of the issue and the need to get the language right, rather than rush this through in a matter of weeks."

### **"Likely Tax Increase"**

Topic cited a "likely tax increase," but noted that the "[b]ecause of the unreasonably short two-week timeframe the Council has given us to respond to this measure before its vote, our analysis of the financial impacts of the proposed referendum, if eventually implemented, is only preliminary, and the true impact may be significantly higher."

Per Topic's letter, implementing a new library entity could result in the following financial repercussions:

- Increased tax levy to set up an operating reserve
- Loss of free electricity library receives via village
- Costs for new staff and consultants
- Lower bond rating
- Costs of legal work

"Against the significant tax increase residents may face from this proposal, however, its proponents have not identified a single tangible benefit to the community of any kind that would be gained from these increased costs," Topic wrote.

Citing death threats and "[attacks](#)" on the library, Topic contended that the referendum could be "needlessly divisive." He concluded,

"One hundred and thirty years is a long time for an institution to endure, and that tradition deserves due respect, especially when the institution has consistently succeeded in achieving its mission. The Council should take far more than two chaotic weeks to consider the financial and other implications of what it is contemplating, or what it would ask voters to consider in the referendum. We are happy to discuss all of this with the Council in an orderly fashion. Unfortunately, the proposed resolution, if enacted, does not allow that. We strongly encourage you to vote against the resolution."

Mayor Barnett told Patch via email,

"The question being considered for a non-binding, advisory referendum is: 'Shall the trustees of the Downers Grove Public Library

be elected, rather than appointed?' It is a straightforward question seeking public input. How voters may answer this question is unknown, and any speculations are premature. No outcome of such a referendum question dictates any particular path forward, as it relates to governance or structure of the Library. In fact, irrespective of the outcome of such a referendum, the Library may remain a Component Unit of the Village Government, preserving any financial benefit to taxpayers that such an arrangement provides currently. The Spring election is the municipal election. It is where we elect our local officials, including our school boards, park districts and Village leaders. It is therefore a logical alignment to ask those voters, for whom local government is important, to weigh in on this local government question. What is being considered is simply a question of whether those residents that the Library serves would like to have a more direct voice in choosing those that represent them on the Library Board of Trustees."

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## **DOWNERS GROVE PUBLIC LIBRARY**

1050 Curtiss Street  
Downers Grove, IL 60515  
630-960-1200  
dglibrary.org

November 26, 2024

Dear Mayor Barnett and Village Council:

I write on behalf of the Downers Grove Board of Library Trustees with regard to Council Resolution 2024-10593, which seeks to place a nonbinding referendum on the ballot next April asking “Shall the trustees of the Downers Grove Public Library be elected, rather than appointed?” The resolution is scheduled for a vote on December 3, 2024, and was introduced at the Council’s November 19, 2024 meeting.

We respond in detail below, but in short, based on the initial assessment that the unreasonably short timing of the Council’s scheduled vote has allowed us to conduct, we believe:

1. the language of the referendum is nonsensical because we are aware of no legal mechanism to allow for the election of trustees under the existing library structure;
2. the extensive legal and structural changes that would be required to implement an elected library board, such as becoming an independent taxing body separate from the Village, will have costs that will likely result in higher taxes for Downers Grove residents.

Regardless of the merits of the proposal itself, however, proceeding with the referendum on such a chaotic timeline is contrary to the best interests of our residents, and unprofessional to ask of a fellow unit of government—one that has existed in its current form for over 130 years. For that reason, we previously asked that the Council grant us the courtesy of delaying its vote by at least one month to allow us to prepare a proper report on the impact of proceeding with the proposed referendum, but to date, that request has not been granted.

We unequivocally ask that you vote no on this resolution.

### **The History and Achievements of the Library.**

The library has existed as a commission form of government since 1891, which is why, pursuant to Illinois law, its trustees are appointed and not elected. While we recognize that need not be set in stone, we think the Council should proceed with humility in determining, over the course of two weeks, whether to ask voters to undo something that has worked for over 130 years, even in a non-binding fashion.

Against this long tradition, the proponents of the resolution have not identified any real-world problem they are attempting to solve. To the contrary, the library is thriving. Attendance and circulation continue to increase, and the library was named among the top 10 public libraries in its budget class in the country, all while consistently staying under

budget, handling capital needs responsibly, meeting its strategic goals, and implementing structural changes to our operations to continue to best serve the community. Top-quality public libraries like ours increase marketability and property values, which should not lightly be put at risk.

All that the proponents of the resolution have offered in support of it are abstract political theories, unsupported by any empirical evidence or any tangible problems in need of fixing. That is hardly a sufficient basis to ask voters to overthrow 130 years of tradition and a proven record of success, let alone after only two weeks of consideration and little opportunity for the library to evaluate the full ramifications of the proposed referendum.

### **Preparing for the Referendum On Such Short Notice Will Interfere With the Library's Strategic Plan, Operational Priorities, and Budget.**

As the Council knows because its members participated in the process, the library undertook an extensive strategic planning and work plan development process in 2023. The development and implementation of a strategic plan is critical to good government: that is why the Council consistently connects its own actions to its own strategic plans, though here the only justification from the Council's strategic plan for the proposed referendum is the goal of "exceptional municipal services." We are confident that the library consistently provides exceptional services under its current structure, and to the extent the Council disagrees, it can and should raise any specific concerns with us. We are not aware of any library service issues that arose in the Village's own strategic planning process.

Ignoring the importance of strategic planning to the operation of good government, Council members in support of the measure have said that any efforts to educate the public about the proposed referendum will fall on the library. So over the course of less than four months, and starting completely from zero with no prior warning, the library will need to undertake significant efforts and incur significant costs. This will come at the expense of other budget priorities, of work that has been planned in furtherance of our strategic plan, and of our regular operations.

We have not been given nearly enough time to assess these properly and in the level of detail they deserve, but here are immediate expenses (required before April 2025) that we have identified so far:

1. **Legal fees.** We are not aware of any mechanism that would allow for the change the referendum contemplates within the existing library structure. The only way we can conceive to accomplish the objective of the referendum is to create a new library district, but our lawyers have not evaluated that question for us. Whatever the answer, they would then need to prepare a comprehensive report about all of the changes that would come with creating a new library district.
2. **Financial consultant fees.** Once we have identified the actual legal changes that would be required to have an elected library board, we would likely need to retain a financial consultant to analyze the impact on the library's budget of those changes, and thus, the impact on Downers Grove taxpayers. While we can do some initial estimating ourselves, and have provided very preliminary assessments below, we trust you will agree that taxpayers ought to have as solid of information as possible about the financial ramifications of their vote if it is later acted upon. Otherwise, there is little point to the referendum other than political theater.
3. **Communication consultant fees.** Once the legal, financial, and other ramifications of the referendum's proposal have been identified, we would need to conduct a campaign to educate the public about them. This would likely require us to retain a communications consultant, as a project of this scope would be difficult to accomplish internally without making significant compromises to our other communications efforts, including the publishing of our Discoveries newsletter.

In addition to these hard costs, preparing for the referendum will require significant focus from the Board and library staff. This will necessarily divert our limited bandwidth away from our strategic plan and work goals. Our 2025 Work Plan is available on our website, but among other goals for 2025, we will be working on implementing new ADA accessibility legal requirements on all digital content, initiatives around the quality and browsability of our resources, expanding our teen graphic novel collection, creating programs for new parents and newborns, building/space assessment, auditing our policy manual, and implementing a host of

new policies and operational improvements. In all, our work plan for 2025 has 41 items, and acting on them while also spending the first quarter of the year in an all-out sprint to prepare for an April 1 referendum is not the kind of good and orderly government our constituents expect of us or from the Council.

### **The Referendum Language is Problematic.**

We trust that you agree that the language of a referendum should be specific about precisely what question voters are being asked. Otherwise, the results of the referendum will be of little use to the Council in deciding how to proceed. Thus, the recent gambling referendum stated:

*Shall the Village of Downers Grove permit video gaming only for establishments holding (i) restaurant liquor licenses and located outside of the Downtown and (ii) club and recreational facilities liquor licenses, with restrictions placed on the number of licenses, the number of terminals, terminal configuration, terminal visibility, establishment proximity to churches and schools, and with no allowance whatsoever for video gaming cafes in the Village of Downers Grove, County of DuPage, State of Illinois? YES / NO*

The proposed library referendum, however, states: “Shall the trustees of the Downers Grove Public Library be elected, rather than appointed?” But we are aware of no legal option in the current library structure to accomplish this. Rather, such a change could only take place in the context of specific changes to the legal status of the library, which is not even identified in the referendum and which would introduce a whole host of issues and questions that go beyond the referendum’s question. To know that a majority of residents prefer an elected board in the abstract tells the Council nothing about whether they want to accept the real-world ramifications of making legal changes to permit it. And the current proposed referendum language obscures this by removing the language that appeared in the resolution proposed in the Council’s November 12, 2024 agenda, asking whether the library should “become an independent unit of government.”

Because of the timing with which the sponsor of the resolution elected to proceed, there has simply not been enough time to develop appropriate language for the referendum itself. Indeed, it has already been significantly changed once, which demonstrates the complexity of the issue and the need to get the language right, rather than rush this through in a matter of weeks. The vague nature of the referendum language will make it needlessly difficult, and more expensive, for the library to educate the public on exactly what the referendum is asking so as to address the actual ramifications of what it is being asked.

### **The Likely Financial Impact on Taxpayers of Replacing the Library With a New Legal Entity.**

Because of the unreasonably short two-week timeframe the Council has given us to respond to this measure before its vote, our analysis of the financial impacts of the proposed referendum, if eventually implemented, is only preliminary, and the true impact may be significantly higher. For this reason, we hesitate even to provide an estimate, but believe that Council members should at least have an initial sense of the likely tax increase that their referendum, if successful and implemented, would have on the taxpayers they represent.

We first note, however, that the proponents of the resolution have not even attempted to quantify the financial impact of what they have proposed, and did not even seek out this information from the library before placing this item on the Council’s agenda for a vote.

In the limited time available since November 19, when the Council voted to place this on its December 3 agenda for a vote, we have identified at least the following additional costs to taxpayers—costs that do not have any significant corresponding reduction to the Village’s own tax levy. In other words, the total cost of government to Downers Grove taxpayers will likely go up if the referendum were to pass and the changes it would require to implement were made, and most of these costs would be ongoing.

1. A new library entity may need to raise a levy of over **\$2 million** to establish an operating reserve. That’s a nearly **35% one-time increase** to the library’s tax levy, which will fall on the shoulders of Downers Grove taxpayers.

2. A new library entity will lose the free electricity that it currently receives through the Village from ComEd, at a cost of at least **\$100,000 per year**.
3. A new library entity will need to employ its own additional administrative staff and consultants to replace those that are currently provided by the Village at only modest incremental cost to the Village. As those with business experience know, there are often cost savings when companies merge, which is why there is a trend towards consolidation of the unusually large number of units of government in Illinois, not expansion. We initially estimate these to be at least **\$150,000 per year**, and they could easily be much higher.
4. The **bond rating** of a newly created entity would presumably be lower than that of the Village, resulting in higher borrowing costs that we are unable to quantify.
5. We have not yet been able to examine the **deed and lease history** of the property on which the library sits to determine what additional costs might be required if the library is transferred to a new legal entity.
6. There would be a significant amount of costly **legal work** to effectuate the transfer of assets and operations to a new entity.

These are significant additional costs, and the amount of the annual increase to the library's tax levy to cover them could easily **double** the level of annual cost-of-doing-business increases, in addition to the significant year-one costs of creating a reserve and effectuating a transfer.

To be sure, tax levy increases are sometimes necessary and appropriate to provide the kinds of services our community expects and to ensure that our capital needs are met. Against the significant tax increase residents may face from this proposal, however, its proponents have not identified a single tangible benefit to the community of any kind that would be gained from these increased costs.

It is true that there may be ways to minimize these financial impacts, though we are not aware of any at present. But the critical point we wish to convey is that those things should be sorted out **before** voting to place the issue on the referendum, and the language of the referendum should present voters with an accurate description of what would be entailed to create an elected library body. These are things that we could have done in an orderly fashion had the sponsor of the resolution either introduced it months earlier or taken more time for discussion before moving to vote on the issue in the span of two weeks, one of which includes the Thanksgiving holiday. And there are things that we could better address if the Council would take the modest and reasonable step of delaying its vote by at least one month, as we have requested in the November 23, 2024 email attached to this letter.

### **The Library Board is Accountable in its Present Form.**

We understand the proponents of the resolution to believe that an elected Library Board would increase accountability. As trustees, we owe a fiduciary duty to the library and to the residents of Downers Grove. We strongly believe we have fulfilled these duties, and the Council has not suggested otherwise.

To the extent the Council disagrees and believes that any trustees are failing to fulfill their duties, however, it can remove them. Two trustees have been removed by the Council in recent years, and the Council has recently updated its practices on appointment of library trustees, which has only begun to play out in recent appointments. In fact, unlike Council members who can serve out the remainder of a term before being held accountable by the voters for bad decisions, and who may not be running for reelection or even eligible to run for reelection due to term limits, trustees can be removed by the Council at any time.

### **The Referendum Will Be Needlessly Divisive.**

As the Council is aware, the library has been the subject of attacks and even death threats. Many of those have come from outside the community. A referendum on this issue will attract significant interest from those same groups, who will pour their money, vitriol, and threats into the referendum. And if the non-binding referendum eventually leads to its goal of creating an elected library board, those same outside interest groups

will likely attempt to influence our local elections to further ideologies that are out of touch with the vast majority of this community.

We of course believe in the principles of the democratic republic on which our nation and village are founded, but those principles are reflected already in the commission form of government under which we have operated for well over a century. The Council should give further consideration to whether it wants to put the residents of Downers Grove through a divisive election on this issue at this time.

**Regardless of the Merits, the Timing of This Referendum is Irresponsible.**

The Council took years of careful planning to discuss video gambling before proceeding with a referendum—an issue not nearly as complex or laden with financial and other risks as this one. We have been given two weeks, one of which is Thanksgiving week, to weigh in on this issue, and will have only a few months to prepare for the referendum if the resolution passes.

The Council does not appear to have done any investigation of its own either: there has been no effort by the Council, the sponsor of the resolution, or Village staff acting at the Council's direction to obtain any information from the library about the impact on Downers Grove taxpayers of the referendum or the legal changes that would be required to implement it if successful. Rushing this issue through in two weeks, and leaving the library only a few months to prepare for a referendum, is irresponsible.

Nor has the sponsor of the resolution provided any explanation for the hasty consideration of this issue. We are not aware of any recent or anticipated events or issues that have precipitated the introduction of the resolution at this time or that justify departure from the principles of good and orderly government that our residents expect before the Council votes.

For these reasons and others, we recently asked the Council to postpone its vote for at least one month to allow the library time to prepare a more fulsome report of the impact the referendum will have on its operations, strategic plan, and budget over the coming months. We reiterate that request again here.

**Conclusion.**

One hundred and thirty years is a long time for an institution to endure, and that tradition deserves due respect, especially when the institution has consistently succeeded in achieving its mission. The Council should take far more than two chaotic weeks to consider the financial and other implications of what it is contemplating or what it would ask voters to consider in the referendum. We are happy to discuss all of this with the Council in an orderly fashion. Unfortunately, the proposed resolution, if enacted, does not allow that. We strongly encourage you to vote against the resolution.

Sincerely,

Matt Topic  
President  
Downers Grove Board of Library Trustees

CC: Downers Grove Board of Library Trustees

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**December 3 Village Council Meeting**

1 message

**Matthew Topic** <mtopic@dglibrary.org>

To: mayorcouncil@downers.us

Bcc: Board of Trustees &lt;board-of-trustees@dglibrary.org&gt;, Julie Milavec &lt;jmilavec@dglibrary.org&gt;

Sat, Nov 23, 2024 at 12:43 PM

Dear Mayor Barnett:

I am writing to request that the village council delay its December 3 vote on the proposed referendum regarding the library by at least one month so as to allow us to prepare a report of the impact on our operations, strategic plan, and budget should the referendum go forward.

The referendum will require the library to engage in fact finding, analysis, and public education about the proposal and its ramifications. We believe the council would greatly benefit from a better understanding of what those efforts entail and what sacrifices they will require. To be clear, this report would not be directed to the merits of the referendum question itself, which will require more time to develop fully, but will address the impact on the library to prepare for the referendum and, if appropriate, propose alternative language for the referendum. As the council was likely unaware when it set the timing for the December 3 vote, there has not been an opportunity for our board to meet as a group to discuss this in sufficient detail and to receive comments from the public before December 3; our only meeting fell the day after after the council voted to place the item on its December 3 agenda, and we were only able to discuss briefly, since there was no opportunity to place this on our agenda.

In addition, I am new to the library board and have been its president for less than two months. As a professional courtesy, I would ask that you allow me a little more time to navigate the library through this issue in a responsible manner. I am also scheduled to be out of town for a court hearing on behalf of a client on December 3, and while I will make every effort I can to return in time for the council meeting, those circumstances are beyond my control and rescheduling my hearing is not an option. Further, this week is a holiday week, and I do not want to ask our hard-working staff to make sacrifices over the Thanksgiving holiday to attempt to prepare, as best as possible, for the December 3 vote. This modest delay will also allow for additional time for the public to provide its feedback to us and to the council before it votes. Additional time would be preferable, but a one-month delay would help us significantly.

Given that the council already postponed its vote on whether to consider this resolution once, and that the library has existed in its current form for over 130 years, I think our request for a modest amount of additional time to prepare a proper report on the impact of the referendum and allow for more fulsome public debate about the impact of holding it is a reasonable one, and I ask that you grant it. Please let me know as soon as possible so we can prepare accordingly. I have blind-copied the library trustees, who unanimously concur in this request. Feel free to call me any time to discuss.

Sincerely,

Matt Topic  
President  
Downers Grove Public Library Board of Trustees

# On the same page: Roselle library, village set in motion land swap plan



A rendering shows a planned new Roselle Public Library. *Courtesy of Product Architecture + Design*

**Posted December 04, 2024 6:32 pm**

[Katlyn Smith](#)

The Roselle Public Library District and the village are moving forward with a plan to swap properties now that voters have approved funding for a new library building on what is currently municipal-owned land.

The district secured voter permission to issue \$22 million in bonds to create a neighborhood library on the site of the former Trinity Community Center. The village now owns that parcel along Maple Avenue.

Under the terms of their land swap agreement, the library district will continue serving patrons out of its Park Street facility until the construction of the new one is complete. The village, in turn, will take ownership of the existing building once the library moves to the new campus.

Roselle Mayor David Pileski hailed the agreement as an example of how “two different taxing bodies who have very different missions could work together in their respective ways to really create more value for their stakeholders.”

In addition to discussing a redevelopment of the current library property, the village will “engage the community in a broader conversation about the growth and vision for the Village Center in downtown Roselle,” according to a joint statement with the library.

“Us working together to support each other and our different missions is really going to give Roselle a unique generational opportunity that we have not seen since we developed our Main Street” 20-plus years ago, Pileski said Wednesday.

Now, there’s a lot of interest from retail and other shopping experiences, the mayor said, but there’s also a lack of “great retail storefront space.”

“I think, in general, what we'd like to do is see something that has the density of what we've seen Main Street develop towards, with that ability to have a mixed-use there,” Pileski said.

Roselle will leverage the same planning consulting firm the village used for its 2016 comprehensive plan to refresh “just this specific area,” the mayor said. Officials also will seek feedback from residents as well as business owners and developers.

“The other thing that we think would be really valuable is to have property that's adjacent to our already flourishing downtown to help us make sure that we can expand parking as needed ... Now, would I say we need a parking garage today? No, those are expensive, long-term assets,” Pileski said.

But, he added, “having that land available to us to reconfigure and do that once we hit the right kind of density and performance, that opens up a whole lot of future success for our area as well.”

Per the agreement with the library, the village will handle the demolition and site preparation up to \$450,000. If costs exceed that amount, the village and library will need to determine cost-sharing. The district is “wholly responsible” for the construction of the new library.

“Of course, the library is excited, but when we talk to people who come by and want to know about when we're going to get going, there's just a lot of energy,” said Samantha Johnson, the library’s executive director.

The new library will include expanded areas dedicated to youth and technology, plus adjacent parking and a drive-up service window.

“We are now going to transition to the preparation stages for the new building project, which we anticipate will last throughout 2025,” said Library Board President Katie Smith in the statement.

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# How to be Indian Trails Library's next maker-in-residence



Artist Anastasia Sitnikov was the Indian Trails Public Library's first maker-in-residence in 2023. Applications for the 2025 post are now available. *Russell Lissau*/rlissau@dailyherald.com, 2023

Posted December 03, 2024 7:17 pm

[Russell Lissau](#)

If you're an artist who would enjoy working in front of an ever-changing, public audience, consider applying to be the [Indian Trails Public Library District's](#) next maker-in-residence.

Applications are available for the annual summertime program at the main library, 355 Schoenbeck Road in Wheeling.

The maker-in-residence will create a piece in the Launch Pad, the library's maker space, over six weeks as patrons observe or work on their own projects. Once completed, the piece will be displayed at the library.

Qualifying pieces aren't limited to traditional art. In addition to a painting, sculpture or drawing, the maker could create something digitally or by using a 3D printer, a laser cutter or another tool available in the Launch Pad.

In addition to creating a piece, the chosen artist will lead workshops for patrons.

Preference will be given to applicants who plan to use tools available in the Launch Pad as part of their project. Indian Trails Library District residents also will be given preferential consideration.

The maker-in-residence will be paid \$1,500.

Applications are due by Jan. 26. Applicants must be at least 18 years old and submit to background checks.

[Anastasia Sitnikov](#) was the inaugural maker-in-residence in 2023. She made a macramé sculpture that included objects created by patrons.

Animator and visual artist [Shannon Lee](#) had the honor this past summer. In addition to working on her art, Lee led programs about animation and making puppets.

To learn more about the program or to apply, visit [indiantrailslibrary.org/maker in residence/](http://indiantrailslibrary.org/maker_in_residence/).

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SANGAMON COUNTY

# Rochester library faces ethics complaint after allegedly advocating for failed tax rate referendum

by: [Danny Connolly](#), [Theodora Koulouvaris](#)

Posted: Dec 6, 2024 / 11:49 AM CST

Updated: Dec 6, 2024 / 11:49 AM CST

ROCHESTER, Ill. (WCIA) — A public library district in Sangamon and Christian Counties faces dozens of ethics complaints accusing officials of using their government office to promote a referendum.

The Rochester Public Library District asked voters last month with a binding referendum to increase the tax rate for approximately \$8 million in construction plus an increase of \$261,000 per year for operations. The library's website said an average homeowner in the district would pay an additional \$37 each month.

Now, the Illinois chapter of the Americans for Prosperity filed 35 ethics complaints, alleging library workers and board members used their jobs to push residents to vote yes. These complaints include using government emails to coordinate the "Vote Yes" campaign, publishing videos encouraging patrons of the library to join the "Vote Yes" committee on the library's Facebook page and discussing campaign updates at public board meetings.

AFP leaders said Rochester library workers and board members crossed the line between permitted public education and prohibited political promotion.

"The misuse of taxpayer-funded resources for political purposes is a clear violation of Illinois law and local ordinance and erodes public trust," said Brian Costin, Deputy State Director for AFP-IL. "We are calling for accountability and full transparency to ensure these unethical actions do not go unchecked."

AFP sent the complaint to both the State Board of Elections and the Sangamon County State's Attorney's Office to investigate.

The library established a three-member ethics commission to handle the complaint to determine whether it broke its own ethics ordinance. On Wednesday afternoon, the ethics commission met for the first time.

The three-member board could not come to an agreement on opening an investigation, however. One member voted for it, saying the library can't sweep the complaints under the rug,

one voted against it because the language of the library's ethics ordinance is too vague, and one recused themselves because they were named in the complaints.

The next step is for the library board to appoint an alternate member to replace the person who recused themselves. The vote allowing an investigation was tabled until then.

Board of Trustees president Sarah Deen asked for some of the ethics complaints to be dismissed.

"It represents a time when a patron made a request of a library employee for you that they could not fulfill, which is providing 'Vote Yes' materials, and they forwarded that patron's request to someone else. So, they couldn't. There were no vote yes materials available in the library," she said.

Deen declined to comment to WCIA after the meeting.

Due to budget cuts after the failed referendum, the library will cut back to being open 44 hours a week starting in January, officials wrote in a Facebook post. Staff anticipate more cuts at the start of the fiscal year in July.

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