

**AGENDA**  
**SHOREWOOD-TROY PUBLIC LIBRARY DISTRICT**  
**BOARD OF TRUSTEES**  
**650 Deerwood Dr., Shorewood, IL 60404**

**Thursday, November 9, 2023, at 6:30 PM**  
**Public Hearing**  
**Tax Levy Ordinance for FY 2023/2024**

A public hearing on the Tax Levy Ordinance for the Shorewood-Troy Public Library District for FY 2023/2024 will be held at 6:30 pm on Thursday, November 10, 2022. The meeting will be held at the Library located at 650 Deerwood Drive, Shorewood, IL 60404, in Meeting Room A.

This hearing will immediately be followed by the regular meeting of the Board of Trustees.

**November 9, 2023**  
**General Meeting**  
**7:00 pm.**

1. Welcome
2. Call to order and roll call of Trustees
3. Changes/Additions to Agenda
4. Approval of Minutes:
  - Regular Meeting, October 12, 2023
  - Decennial Committee Meeting, October 12, 2023
5. Correspondence
6. Comments from the Public

MEMBERS OF THE PUBLIC ARE INVITED TO SPEAK TO THE BOARD. COMMENTS ARE TO BE LIMITED TO THREE MINUTES OR LESS. DUE TO OPEN MEETINGS ACT RESTRICTIONS, ACTIONS MAY NOT BE TAKEN ON ITEMS NOT ALREADY ON THE AGENDA, BUT ACTION MAY BE DEFERRED TO A LATER BOARD MEETING.
7. Treasurer's Report – October 2023
8. Approval and Payment of Bills
9. Librarian's Report
  - a. Director's Report with personnel– Jennie Cisna Mills
  - b. Department Heads
10. Old Business
  - a. Whistleblower Policy (**Action**)
  - b. Strategic plan (**Action**)
  - c. Lease Update (**Update**)
11. New Business –
  - a. Approve Ordinance 23-3 Tax Levy Ordinance for 2023/2024 for a total of \$1,441,988 levied (**Action**)
  - b. Approve Annual Treasurer's report for FY23 (**Action**)
  - c. Select Designer for a new website (**Action**)
  - d. Janitorial selection for the Library (**Action**)

11. Other Business

- a. Agenda Building for December Meeting
- b. Announcements

12. Adjournment

Any individual requiring special accommodations as specified by the American with Disabilities Act is requested to notify the Shorewood-Troy Public Library District Director at 815-725-1715 at least 24 hours in advance of the meeting date.

For further information regarding this meeting agenda, please contact:

Jennie Cisna Mills, Director  
Shorewood – Troy Public Library District  
650 Deerwood Dr., Shorewood, IL 60404  
815-725-1715, [jmills@shorewoodtroylibrary.org](mailto:jmills@shorewoodtroylibrary.org)

**SHOREWOOD-TROY PUBLIC LIBRARY DISTRICT  
BOARD MEETING  
October 12, 2023**

The regular meeting of the Shorewood-Troy Public Library Board of Trustees was called to order by the President, Thomas Novinski, at 7:00 p.m. on October 12, 2023.

**ROLL CALL:**

**TRUSTEES PRESENT:**

- |                    |                    |
|--------------------|--------------------|
| 1. Karen Voitik    | 5. Thomas Novinski |
| 2. Bob Stahl       | 6. Krysten McGee   |
| 3. Arthetta Reeder |                    |
| 4. Tracy Caswell   |                    |

**ABSENT:** Vito Schultz

**STAFF PRESENT:**

Jennie Mills, Director

**VISITORS PRESENT:** None

**CHANGES/ADDITIONS TO AGENDA:** None

**APPROVAL OF MINUTES:**

Trustee Caswell noted that Old Business, Item B should be amended to reflect that Director Mills had attached the incorrect file in the Board packet in September and that a new version should have been brought forth in October. Treasurer Bob Stahl/Secretary Karen Voitik motioned to approve the minutes of September 14, 2023, with the amendments. The motion passed with all Trustees present voting 'yes.'

**COMMENTS FROM THE PUBLIC:** NONE

**TREASURER'S REPORT:**

Cash on Hand Beginning of September 2023	\$837,856.52
Cash received during September 2023	488,164.28
Disbursements during September 2023	<u>(128,479.47)</u>
Cash on Hand End of September 2023	\$1,197,531.33

**Location and Denomination of Cash**

Petty Cash	\$ 300.00
General Fund Checking – Chase	5,296.78
Money Market Fund – Chase	332,465.84
Old Plank Trail MM X6183	349,334.46
Payroll Account – Chase	802.70
License Plate – Chase	1,353.68
Old Plank Trail MM X9335	22,844.03
Old Plank Trail MM X9981	380,182.98
PMA Financial CD80197	<u>104,960.86</u>
TOTAL	\$1,197,541.33

#### APPROVAL AND PAYMENT OF BILLS:

Treasurer Stahl moved that the bills presented for payment be approved. Secretary Voitik seconded the motion. A roll call vote was taken; the motion passed. All Trustees present voted 'yes'. Secretary Voitik did ask a question about a question in the Amazon report – "Would the receipt printers be reimbursed by the ARPA grant?" Director Mills explained that the receipt printers had not been originally budgeted for in the ARPA grant, so the Library would pay for that out of the Technology Line Item.

CORRESPONDENCE: Correspondence had been shared via an email to the Board in the course of the month.

#### LIBRARIAN'S REPORT:

- a. Director's Report with personnel – Jennie Cisna Mills
  - Director Mills let the Board know that the cleaning company had not been performing well. Trustee Caswell suggested looking at in-house staff for cleaning. The Board directed Director Mills to bring back both quotes from cleaning companies as well as a comparison for in-house janitorial.
  - Director Mills will have the Marketing Coordinator clarify how much interaction is being done through social media.
- b. Department Heads

#### OLD BUSINESS:

- a. Director Mills had discussed the Strategic Plan with several consultants. Two had said that they could tailor it to a smaller package. Quotes will be brought back in November.

#### NEW BUSINESS:

- a. President Novinski presented Head of Adult & Teen Services, Technology Becky Goode with a Certificate honoring her Five-Year Anniversary at the Library.
- b. Trustee Tracy Caswell motioned to approve/Secretary Karen Voitik seconded to approve the Truth in Taxation Notice for 2023 for the Levy Hearing on November 9, 2023. A roll call was conducted, and the motion passed with all Trustees voting 'yes.' The TITA notice will be published as a black-border legal ad in the Shorewood-Sentinel on November 1, 2023.
- c. Treasurer Stahl moved/Secretary Karen Voitik seconded to approve Resolution 23-06 "Resolution to Determine the Estimate of Funds," in the amount of \$1,441,988. A roll call vote was conducted, and the motion passed with all Trustees voting 'yes.'
- d. Treasurer Stahl moved/Trustee Caswell seconded to approve the Board Meeting Dates for 2024 as presented. All present voted 'aye.'
- e. Library Closures for 2024: Trustee Caswell passed out to the Board and Director Mills a spreadsheet displaying that, in 2023, the Shorewood-Troy Library had fewer closing days than many other surrounding libraries or ILA offices. This was partially due to Christmas Eve and New Year's Eve being on Sundays in 2023 (and the Library already being closed on Sundays); in 2024, Christmas Eve was already listed as a proposed holiday. Director Mills noted that she had forgotten to add New Year's Eve to the list and recommended that it be added to the list of proposed holidays; the Board agreed. Other holidays considered included President's Day, MLK Day, and Juneteenth, but others on the Board felt it was nice for the Library to be open when the schools were closed. The Board opted to give staff a



“Floating Holiday” to be used whenever staff wanted and to amend the holiday listing in the employee handbook to add the “floating holiday” permanently. Secretary Voitik/Treasurer Stahl motioned and seconded to approve the Library Closures with the addition of New Year’s Eve and the Floating Holiday. All present voted ‘aye.’

- f. Treasurer Stahl moved/Secretary Voitik seconded to approve the signing of an intergovernmental agreement regarding the placement of a book drop on the Troy Township property to be reimbursed by ARPA funds. All present voted ‘aye.’

Motion made to go into Executive Session to discuss matters related to the purchase of lease of real property for the use of the public body 5ILCS 120/2(c) by Secretary Voitik and seconded by Treasurer Stahl at 7:35 pm.

The open meeting resumed at 7:46 pm

ANNOUNCEMENTS:

- a. November Agenda Setting: Bring back the Whistleblower policy.
- b. Levy Hearing is at 6:30 pm on November 9<sup>th</sup>
- c. Jennie is at the ILA conference from October 24<sup>th</sup> through the 26th

Treasurer Stahl moved/Trustee Reeder seconded for the meeting to adjourn at 7:49 p.m. with all members present voting yes.

Respectfully submitted,  
Jennifer Mills, Director

**SHOREWOOD-TROY PUBLIC LIBRARY**  
**LOCAL GOVERNMENT EFFICIENCY ACT DECENNIAL COMMITTEE MEETING**  
**October 12, 2023**  
**6:30 pm**

The Decennial Committee Meeting was called to order at 6:30 p.m. on October 12, 2023, by Board President Tom Novinski.

**DECENNIAL COMMITTEE MEMBERS PRESENT:**

1. Karen Voitik
2. Tracy Caswell
3. Krysten McGee
4. Jennie Mills
5. Helen Valantinas
6. Erin Gilmartin
7. Thomas Novinski

**COMMITTEE MEMBERS ABSENT:** Vito Schultz, Arthetta Reeder, Bob Stahl

**STAFF PRESENT:**

1. NONE

**GUESTS:** NONE

**CHANGES/ADDITIONS TO AGENDA:** NONE

**APPROVAL OF MINUTES**

Helen Valantinas moved/Karen Voitik seconded to approve the August 10, 2023 meeting minutes. The motion passed with all members voting 'yes,' with the exception of Tom Novinski, who abstained from voting

**COMMENTS FROM THE PUBLIC:** None

**OLD BUSINESS:** None

**NEW BUSINESS:**

- a. Approve Final Report for Submission to Will County, Pending approval of October Board Minutes at the Regular Board meeting on November 9, 2023. Trustee Caswell noted that the Whistleblower auditing official needs to be appointed as well by the Library Board. Once that is completed, Decennial Committee Member Helen Valantinas motioned to approve the report for submission to Will County/Decennial Committee Member Karen Voitik

seconded. All those present voted 'aye.' Director Mills will check with the attorney about how to appropriately approve the October Decennial Committee Board minutes.

COMMENTS FROM THE PUBLIC: None

SURVEY OF RESIDENTS IN ATTENDANCE:

- a. No residents were in attendance.

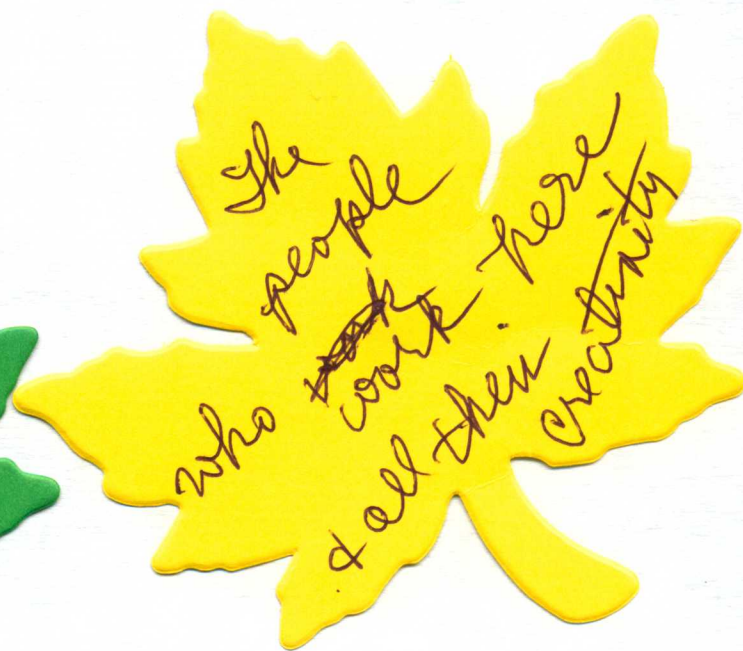
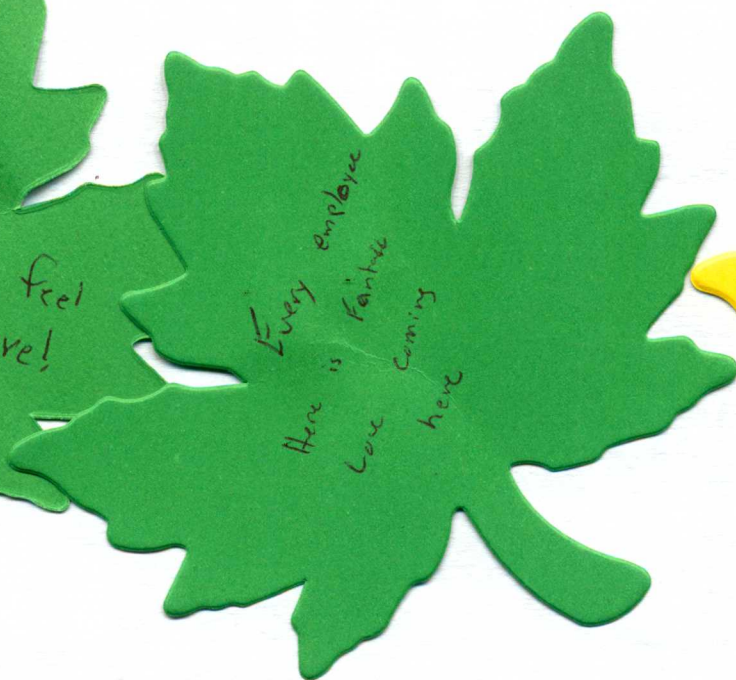
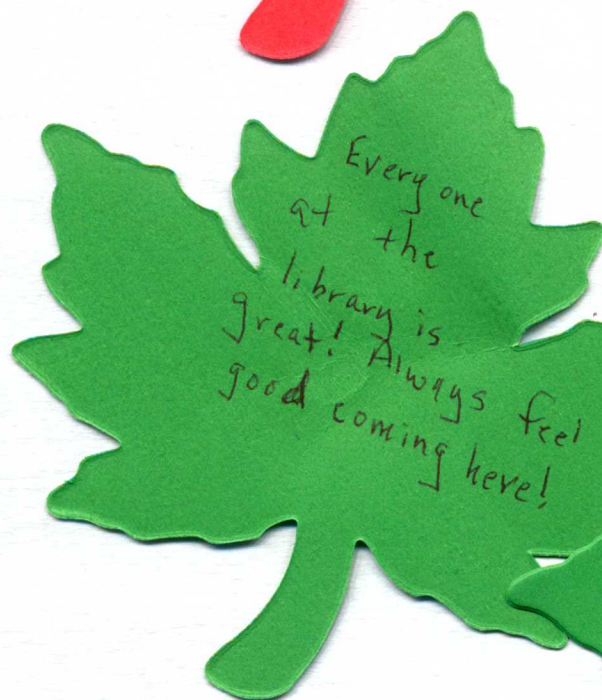
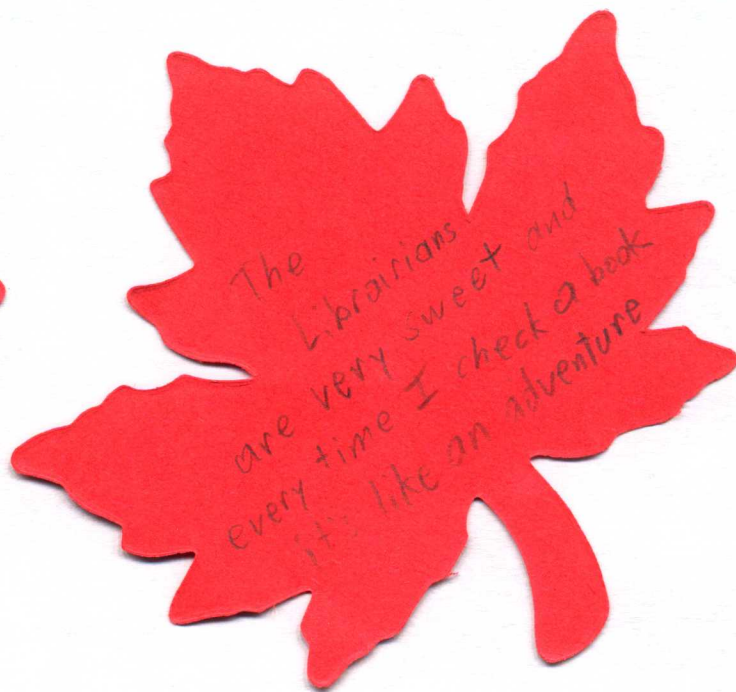
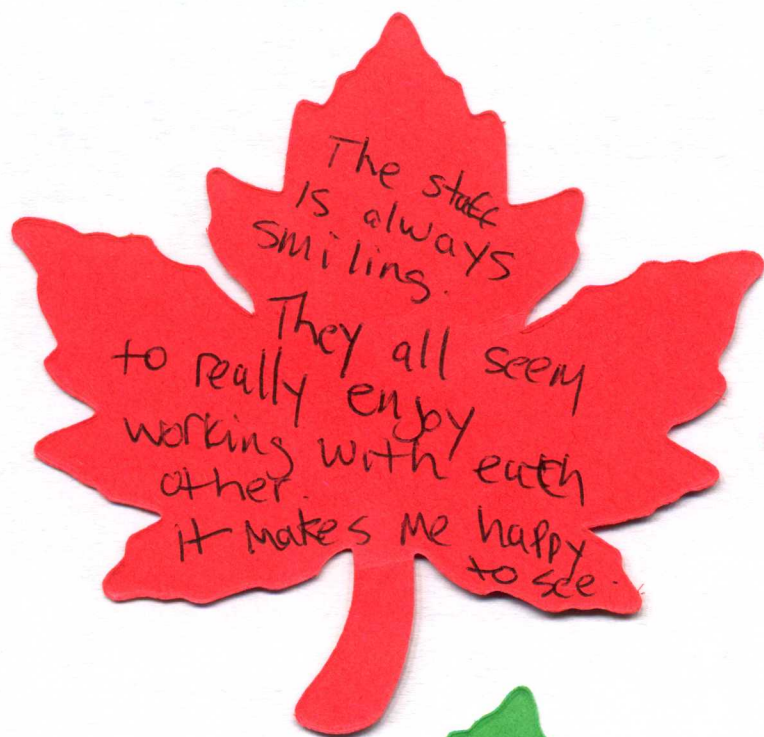
APPRECIATION FOR WORK DONE BY THE COMMITTEE: President Novinski thanked the committee members, while Director Mills handed out thank-you notes and small tokens (key-chains) of gratitude.

ANNOUNCEMENTS: None

Helen Valantinas moved/Karen Voitik seconded to adjourn the meeting at 6:37 p.m. The motion passed with all members present voting 'yes.'

Respectfully submitted,

Jennie Mills, Director





We love  
the library because  
they give us books!

I love...  
that I  
can get  
whatever book  
I want!

what  
I love  
is that  
there is always  
something for  
someone!

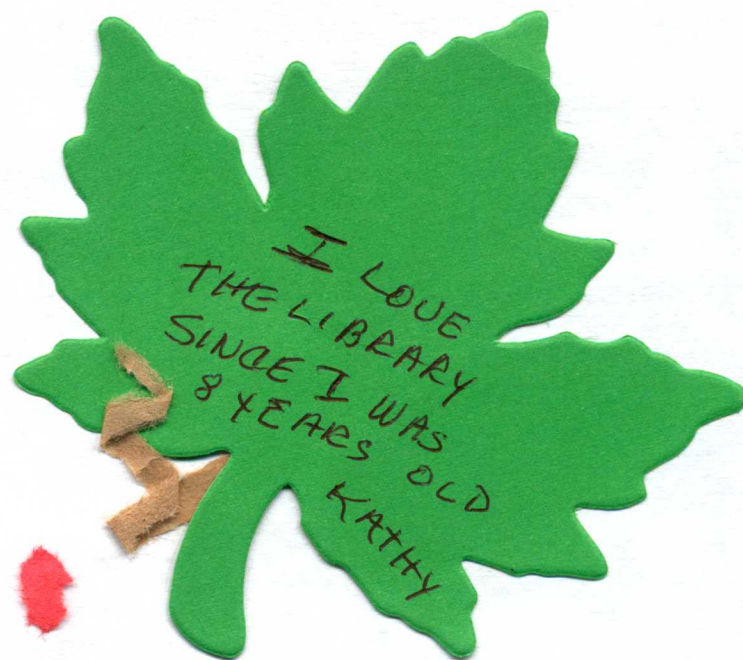
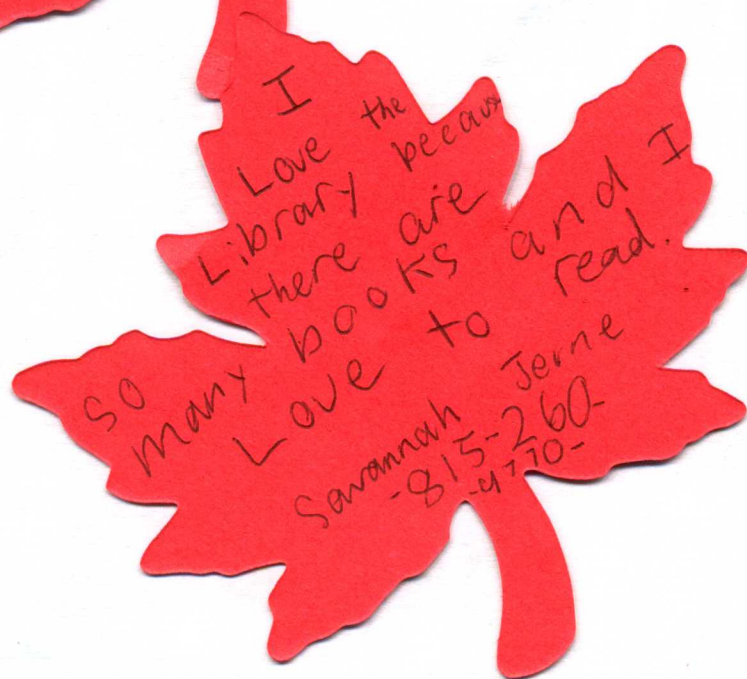
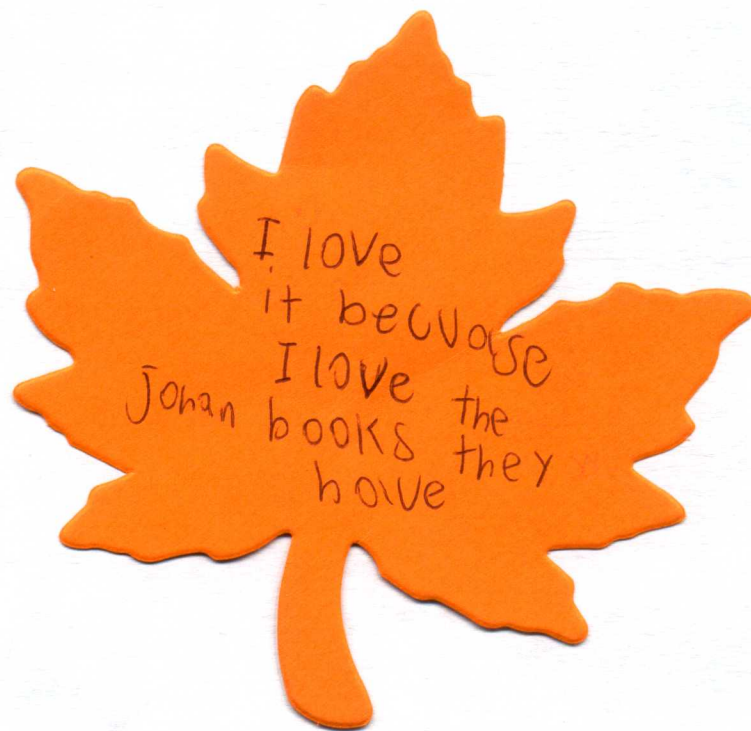
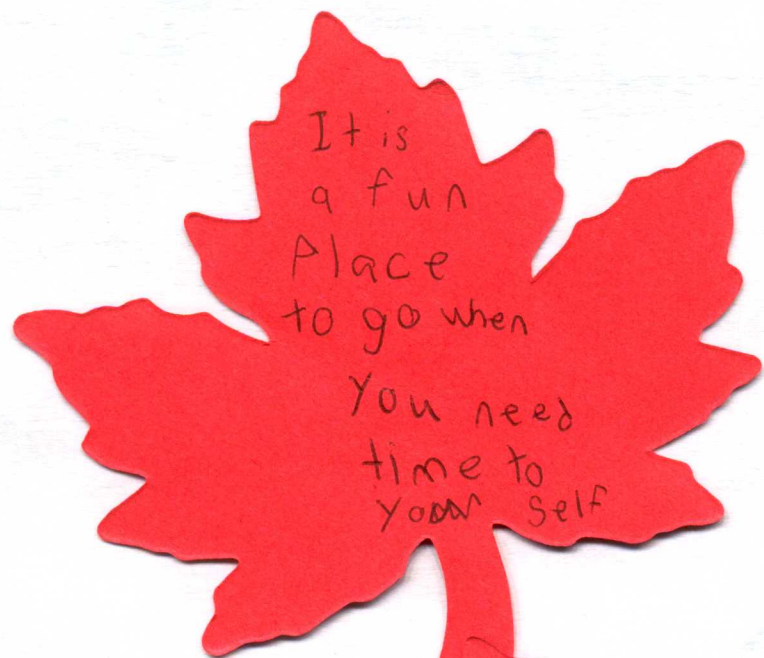
I love  
all the  
different  
books I  
all the  
time.  
and new  
to read  
♥

I ♥  
the friends I  
have made

I like  
the  
decorations

childrens  
department







We love  
the library because  
they give us books!

I love...  
that I  
can get  
whatever book  
I want!

what  
I love  
is that  
there is always  
something for  
someone!

I love  
all the  
different  
books I  
all the  
time.  
and new  
to read  
♥

I ♥  
the friends I  
have made

I like  
the  
decorations

childrens  
department

## Director's Report/November 9<sup>th</sup>, 2023

### Administrative Duties:

- I met with Sheila Reyes at the Timbers of Shorewood on October 30, regarding installing a community book drop on their site. They are excited by the possibility, too. They are running our draft contract through their corporate offices; I hope to have something for the Library's Board to approve in December.
- LIRA (the Library's Insurance Cooperative for Property & Casualty) conducted its annual Physical Hazard Survey walkthrough on November 1<sup>st</sup>. All of the previously noted issues have been corrected:
  - A maximum occupancy sign had been posted in the meeting room
  - The Fire safety doors had been replaced (through the LSCA grant)
  - The Carpeting had been replaced (through the LSCA grant)
  - The Utility Closet door was locked.
  - **NO new issues were noted.** Tracy Lesiak, the representative, noted that cord clutter was very tidy.

### Building:

- Four proposals from new cleaning companies are in your board packet; I also provided a proposed cost chart for a new staff position for a part-time custodian.

### Pinnacle:

- Pinnacle began discussions with the Resource Sharing Committee of RAILS to have the Committee begin exploring the feasibility of offering six-day-a-week delivery to libraries with a delivery volume that would justify it, as most of the Pinnacle libraries would. This is not a service that RAILS currently provides, and a feasibility study will be a lengthy process. However, the Cooperative thinks it would have a beneficial impact on patron services.

### Staffing:

- Maren Flessen has been hired for the Adult Services Programming Coordinator Role. She begins on November 13<sup>th</sup>.
- Passport agents are in the process of their annual re-certification to be passport agents in 2024. Re-certification takes approximately 2 hours. The re-certification package will be submitted to the US Department of State in January of 2024.

### Meetings:

- Department Manager Meeting, Internal (10/17)
- Illinois Library Association Conference, External (10/24 through 10/26)
- Meeting with Staff from Timbers of Shorewood, regarding Book Drop, External (10/30)
- LIRA Loss-Control Preventative Walk-through by Insurance Cooperative, External (11/1)
- Shorewood Area Library Administrators Meeting, External (11/2)



# Technical Services Department Head Report

October 2023

## October meetings and events:

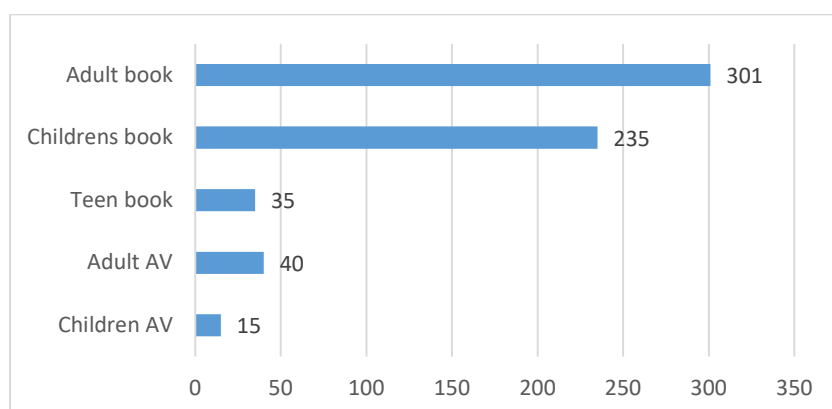
- 10/17 – DH meeting – no news from Tech Services
- 10/27 – PinCollect meeting. Topics discussed were location suggestions for adult graphic novels (overwhelmingly, most libraries agreed that inter-filing them with the adult nonfiction collections was not a good idea), how superhero graphic novels are selected, how libraries set parameters for weeding fiction series, and which libraries are circulating blu-ray TV shows.

## Current projects:

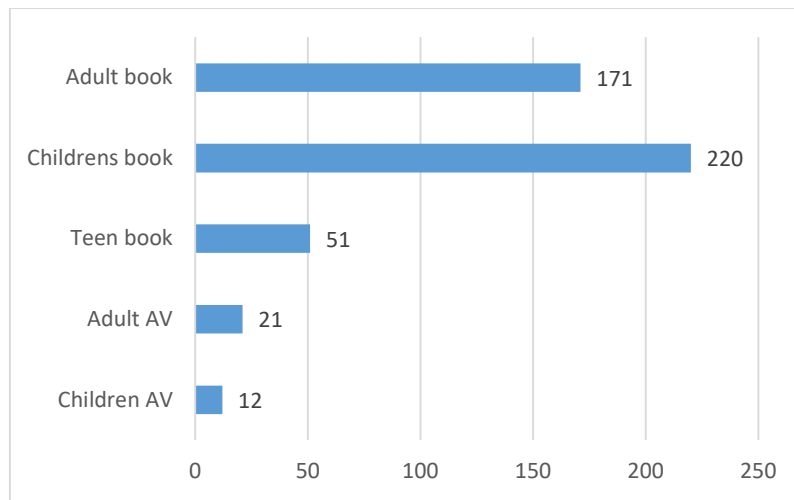
- Re-catalog the Children's Spanish collection. I will be working to make the collection's call numbers consistent.
- I have also re-certified as a passport agent.

## Tech Service Statistics

Items processed, cataloged, and added to the collection in October:



Items ordered in October:



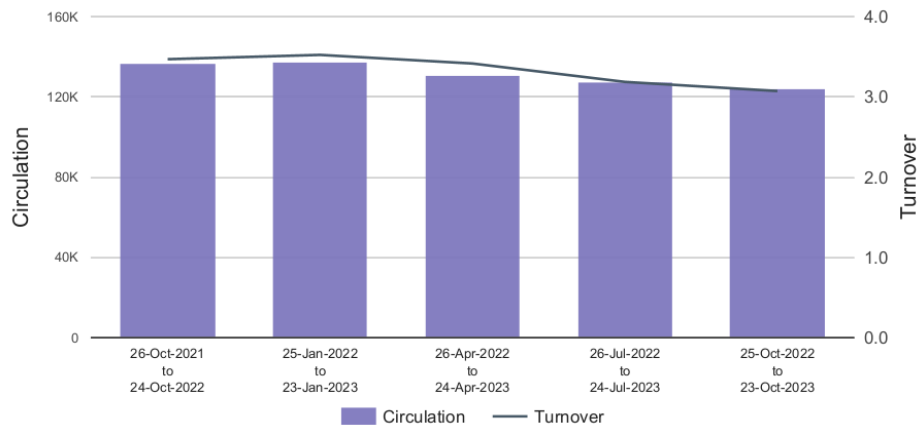
## CollectionHQ

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### Circulation and Turnover

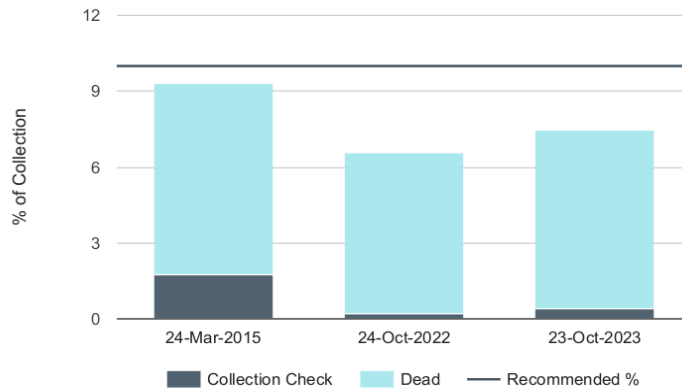
\*This graph displays the circulation of the items in our library as well as the turnover of the items. Data is displayed over 5 points in time.

Turnover is the circulation during the date range divided by the number of our items.



### Dead Items – All Audiences

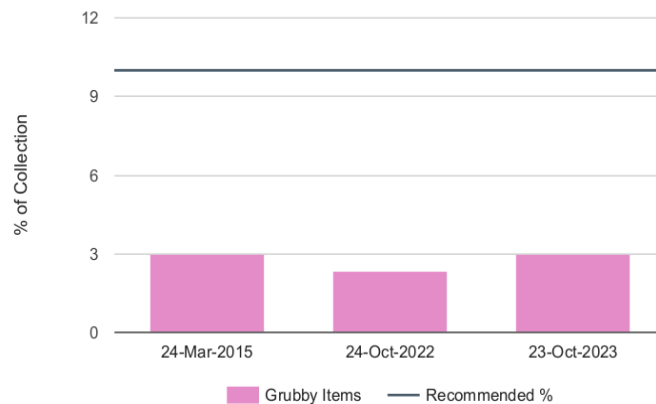
\*This graph shows the percentage of items on shelf that have not been checked out in 2+ years. Our Dead percentage is at 7.48% (0.18% increase from last month). Anything under 10% is considered good.



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### Grubby Items – All Audiences

\*This graph shows the percentage of items currently circulating that have had 40+ checkouts. Our grubby percentage is at 2.98% (.04% increase from last month). As with the dead percentage, the goal is to be under 10%.

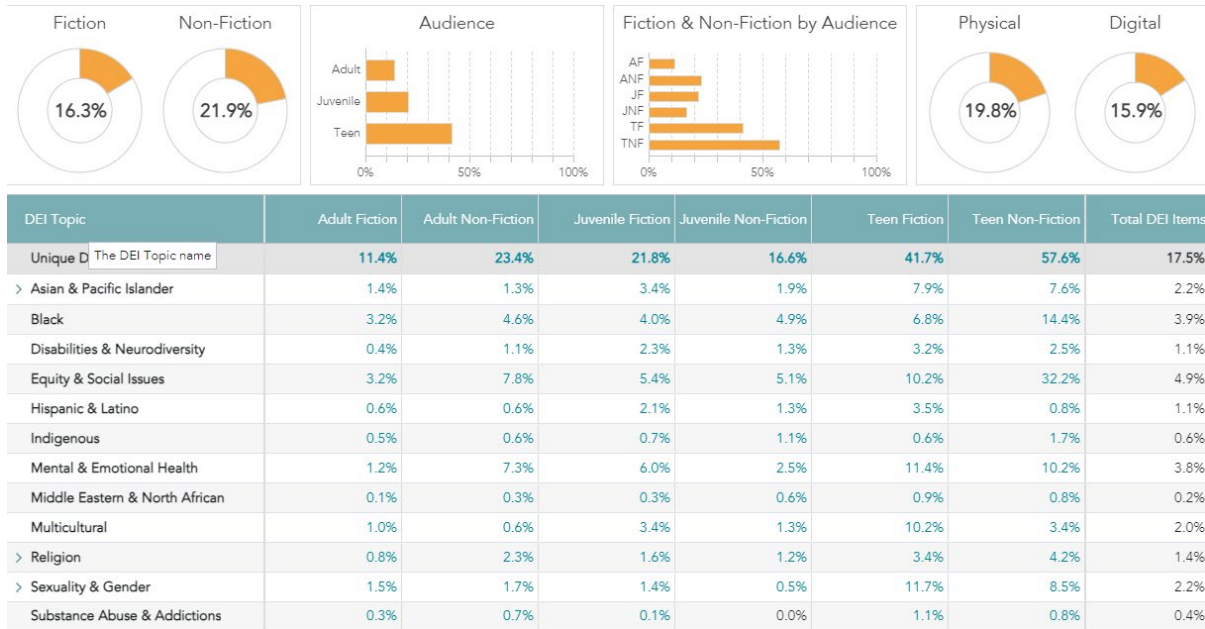


## Diversity, Equity, and Inclusion (DEI)

This is a tool that gives us a snapshot of how diverse our collection is in regards to race, gender, culture, etc.

**Items Analyzed this month: 88,887**

**DEI Items: 15,523 (17.5% of our collection ; .1% increase from last month)**



Respectfully submitted,

Leslie Lovato

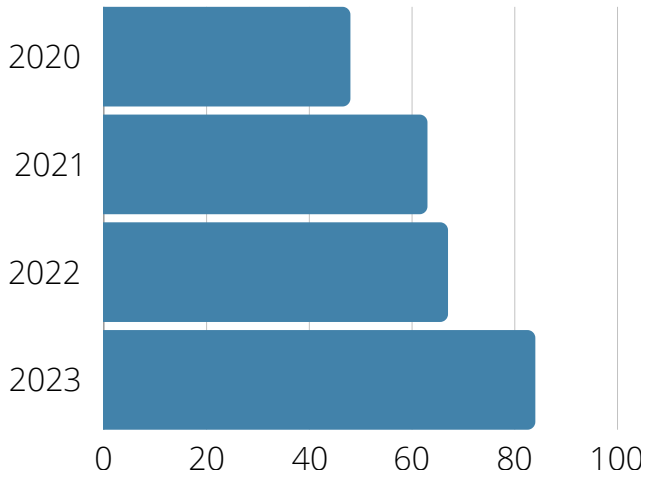
Technical Services Manager

# MONTHLY REPORT

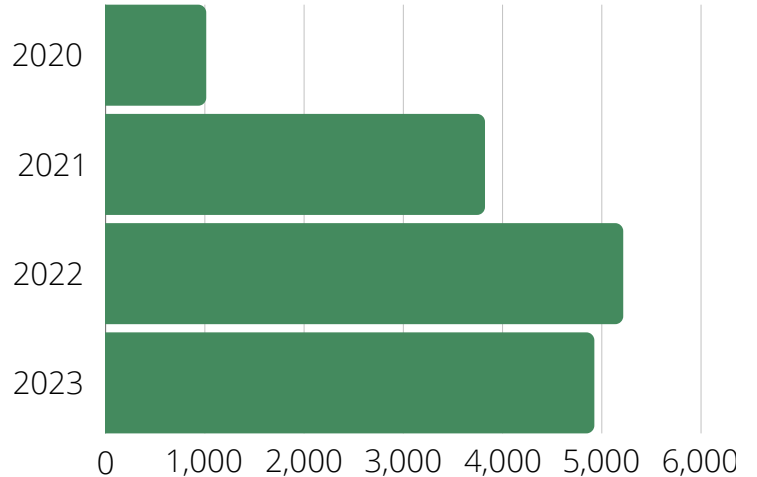
## OCTOBER 2023

**JULIE HORNBERGER**  
CIRCULATION MANAGER

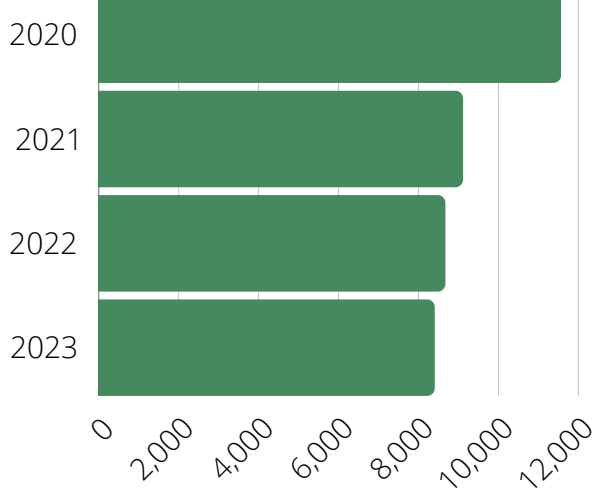
### NEW CARDS



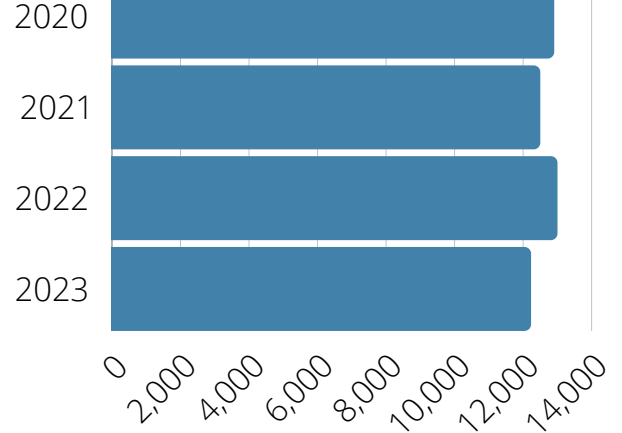
### DOOR COUNT



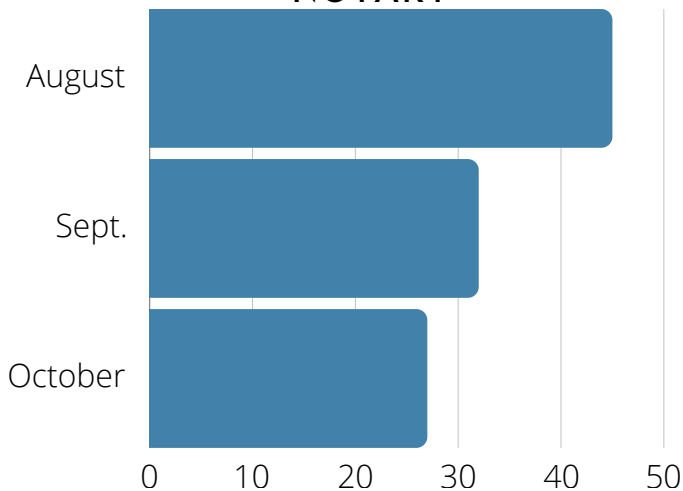
### ITEMS CHECKED IN



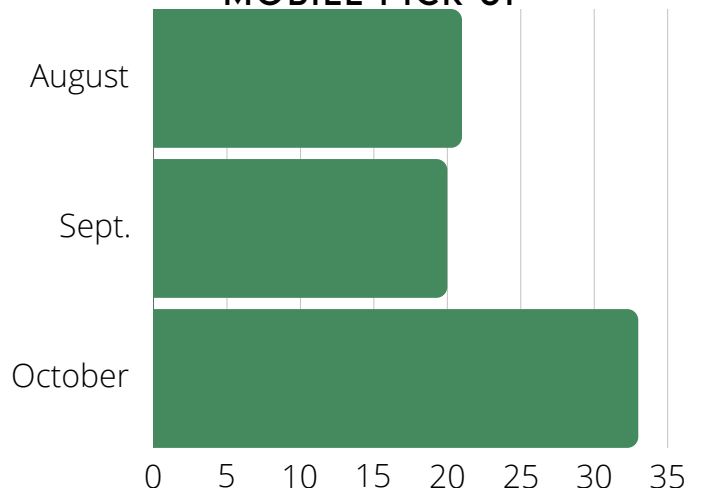
### ITEMS CHECKED OUT



### NOTARY



### MOBILE PICK UP



# MONTHLY REPORT

## October 2023

### LORI FREEMAN

### CHILDREN'S MANAGER

#### DEPARTMENT UPDATES

##### ● What's New?

Movable seating! With the donation from Kiwanis we added a new seating area to the department! We love seeing our patrons utilize the new space!

##### ● Programming

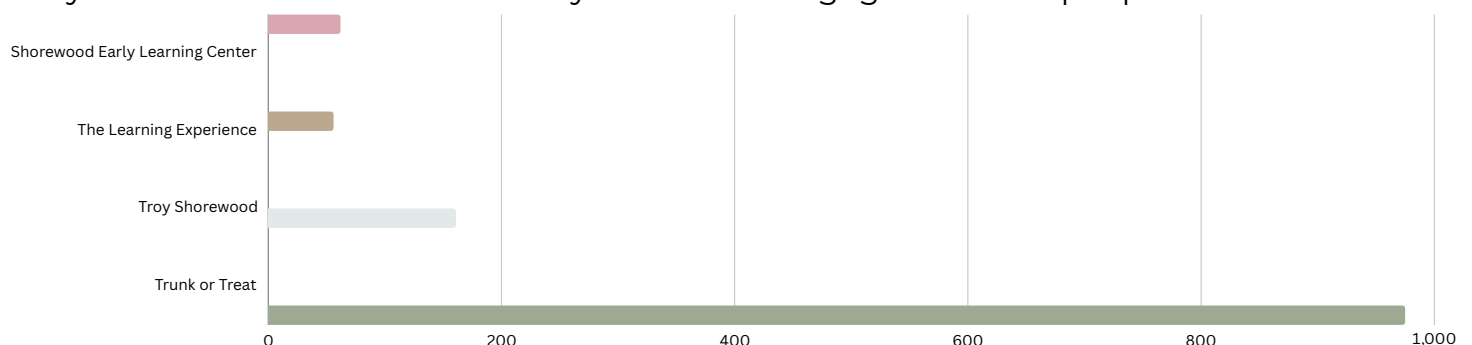
Despite not having our Big Halloween Spooktacular event, we still had a lot of patrons visit our department for our inhouse Halloween Skelebration. Three hundred and seventy eight visitors stopped by our spooky room and participated in the 3 stations we had throughout the department. They finished their visit by trick or treating at all the desks in the library. Feedback has been excellent about the Skelebration and the families really enjoyed themselves.

##### ● Children's Outreach

This month Gina started visiting the local daycares for Storytime's. She spends about an hour at each facility and reads two to three books to each of the preschool classrooms and gives the students informational fliers about our 1KB4K early literacy program. She has scheduled reoccurring monthly visits with Shorewood Early Learning Center and The Learning Experience of Shorewood. Gina has also been in contact with a few other centers and is waiting to hear back from them to set up visits.

Troy Shorewood had their math based Literacy Night and Gina set up a story walk with math stations. At each station the families read the pages from the book Bean Thirteen by Matthew McElligott. Then they had to use the manipulatives to solve the math problems. She had a total engagement 161 people!

Gina and Sarah attended Trunk or Treat at the Shorewood Village Hall. They dressed up as Mario and Luigi. They offered library resources and sweet treats. The event was super busy with lots of fun costumes. They had a total engagement 975 people!!!

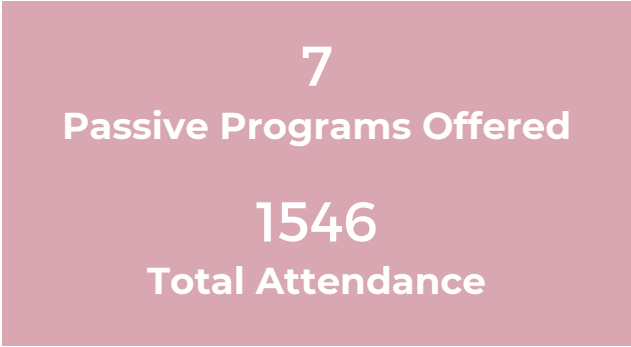


# Deliverables

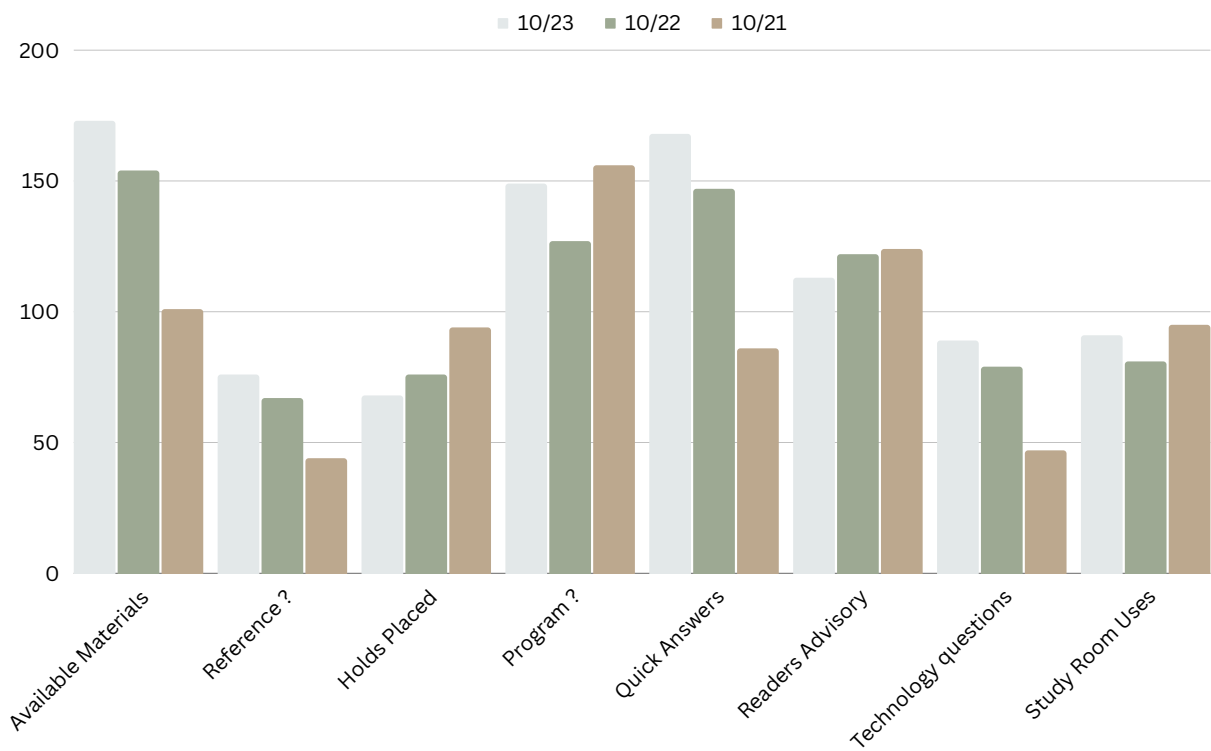
## Active Programs



## Passive Programs



# REFERENCE TRIAGE



## Reference Breakdown 10/23

We had 178 patrons ask about available materials, 76 ask general reference questions, 68 holds were placed, 149 questions were asked about programs, 168 quick answers were provided, 113 reader's advisory transactions were conducted, and 89 patrons asked about technology. 91 study room reservations were made.

# MONTHLY REPORT

## OCTOBER 2023

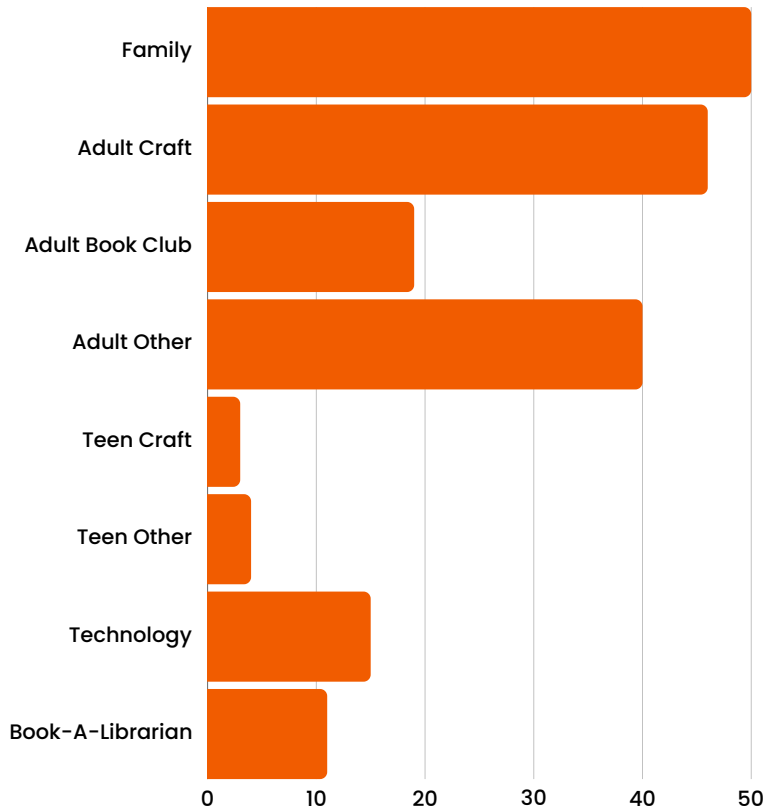
BECKY GOODE  
ADULT, TEEN & TECHNOLOGY SERVICES MANAGER

- Adult Services
  - A Cricut Explore Air 2 machine has been added to our circulating technology collection. This device (plus some accessories) can be checked out by patrons with a Shorewood Card, ages 18+.
- Teen Services
  - An additional table and chair set has been set up in the teen area to provide a space for teens to work on homework and other projects together.
- Adult & Teen Outreach
  - Regular visits to the Shorewood Glen community resumed this month. We will be on a monthly schedule rotating between a craft program and a technology program held at their clubhouse.
- Technology
  - All Roku kits have had a hotspot added, to allow multiple users access to streaming accounts that are now limiting sharing. Streaming services that currently or will eventually require the use of the hotspot include Netflix, Disney+, Hulu, and ESPN+. It is likely that even more streaming services will be added to this list as time goes on.
  - Communico Interact (new self-check program) is still being completed by Communico. We were updated by their launch team that this may take several weeks to complete.

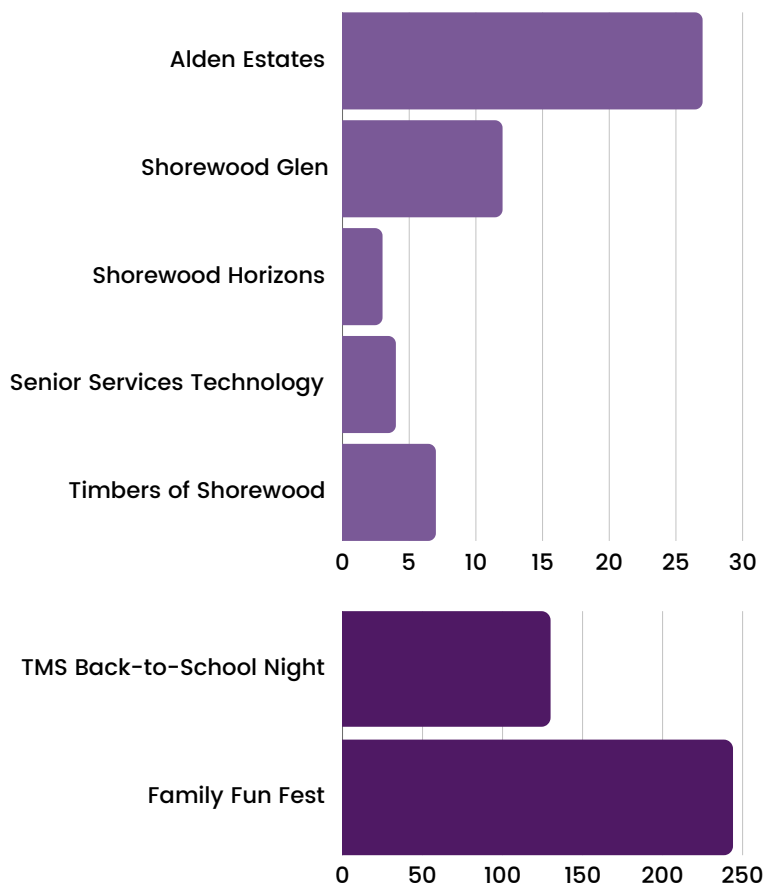


# PROGRAMS & OUTREACH

## ACTIVE PROGRAMS



## OUTREACH PROGRAMS/EVENTS



## PASSIVE PROGRAMS

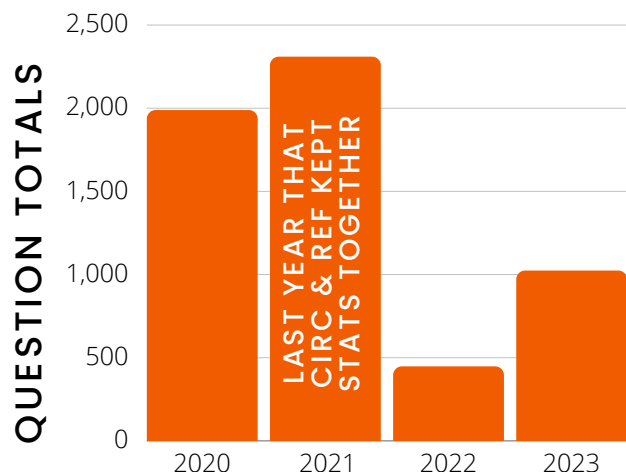
NUMBER OF PROGRAMS: 6  
TOTAL PATRONS: 807

## STAFF MEETINGS PROGRAMS & OUTREACH

- **Becky – Adult, Teen & Technology Manager**
  - Alden Advisory Board Lunch
  - Astronomy for Everyone
  - Board Meeting – 5-Year Anniversary
  - Cricut Training for Dept
  - Department Meeting
  - Department Head Meeting
  - Dungeons & Dragons
  - Eclipse T&M Program
  - ILA Conference – Springfield
  - Medicare 101 Program
  - Middle Managers: Moving Up. "Things I Didn't Learn."
  - Novel Idea Book Club
  - Sunshine Committee Meeting
  - Tech How To: Hoopla Basics
  - Tech How To: Streaming Services
  - Virtual Pinterest Program
- **Sarah – Adult & Teen Outreach Coordinator**
  - Alden Advisory Board Lunch
  - Alden Visit Craft x 2
  - Department Meeting
  - Cricut Training
  - Family Craft
  - Family Fun Fest
  - Home Delivery x 1
  - Horizons Visit x 1
  - ILA Conference – Springfield
  - Joliet Transition Center Tour
  - Joliet Transition Center Training
  - Kiwanis Meeting
  - Senior Services Tech Program
  - Shorewood Glen Craft Program
  - STAR Net Workshop: Loose Parts
  - STEAM Program
  - Timbers Visit x 1
  - Troy Middle School Back-to-School Event
  - Trunk-or-Treat at Village Autumn Fest
- **Violet – Teen Programming Coordinator**
  - Banned Book Bookmark
  - Creepy Cross-Stitch Program
  - Cricut Training
  - Department Meeting
  - Dungeons & Dragons @ Critical Grind
  - Halloween Party Program
  - Matcha Frankenstein Cookies Program
  - Teen D&D x 2
- **Hailie – Adult & Teen Services Assistant**
  - Cricut Training
  - Department Meeting
  - Halloween Party Program

# STATISTICS

## REFERENCE QUESTIONS



### TYPES OF REFERENCE QUESTIONS

**Holds** - when patrons ask for items to be placed on hold for them.

**Item Availability** - when we search our catalog and/or shelves to see if an item is available for checkout.

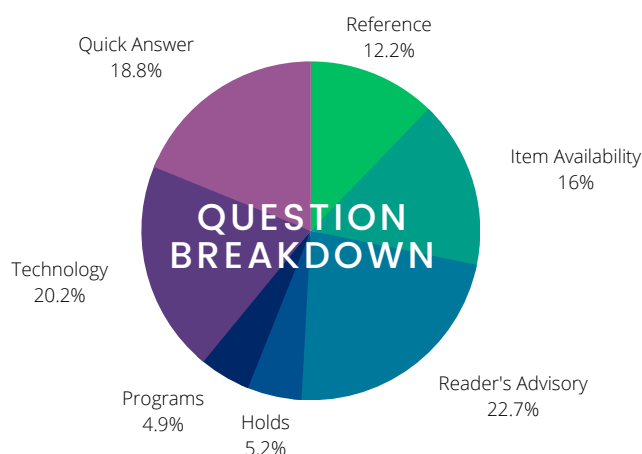
**Programs** - questions related to library programs for all ages. For example, "What do I need to bring with me to the Tai Chi program?"

**Quick Answer** - easy to answer questions with quick answers, such as "What time do you open tomorrow?"

**Reader's Advisory** - reading recommendations based on a conversation with a patron. For example, "Can you help me find a new mystery book? I really like thrillers."

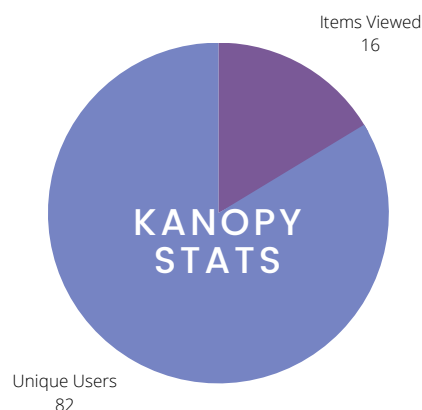
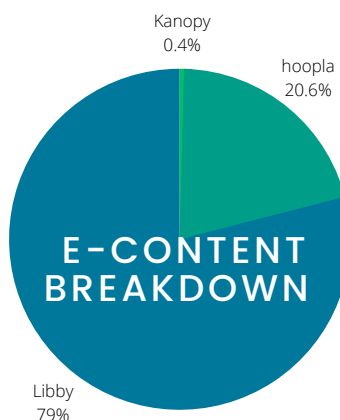
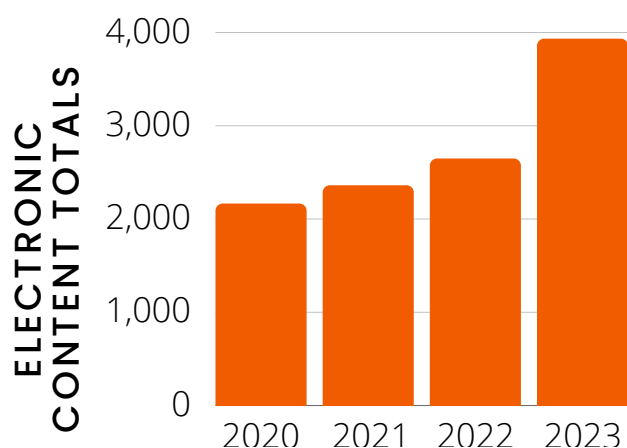
**Reference** - questions involving research, dealing with passports, license plate renewals, or any other in depth topic. For example, "Where is the closest post office, and how do I get there?"

**Technology** - questions on computer programs, smart phones, e-readers, or other technology related programs and devices.



## ELECTRONIC CONTENT

We have three electronic material platforms, Kanopy (movies and television shows), Libby (e-books and audiobooks), and hoopla (e-books, audiobooks, movies, television shows, graphic novels, and music).



# October 2023

## Monthly Board Report

Melissa Almanza, Marketing Specialist

### Department Highlights:

This October was a productive month for marketing. I am working on two new email marketing campaigns and expect to have them launched next month. The first will target inactive patrons with the intention of bringing them back to the library. The second campaign will send an automated list of upcoming programs. Additionally, I am working on optimizing our Google Business profile.

### Website Visits:

2023 - 7,509

2022 - 5,734

2021 - 5,987

### eNewsletter:

2023 - 7,490 emails sent; 45.7% read rate

2022 - 6,803 emails sent; 46.36% read rate

2021 - 6,132 emails sent; 31.02% read rate

### Program Referrals:

#### 10/2023

Social Media: 3

Friend: 9

In-House Signage: 11

Library Staff: 20

Website: 114

Newsletter: 131

Other: 9

Shorewood Neighbors: 1

#### 10/2022

Social Media: 5

Friend: 18

In-House Signage: 22

Library Staff: 40

Website: 172

Newsletter: 283

Other: 39

#### 10/2021

Social Media: 6

Friend: 10

In-House Signage: 8

Library Staff: 13

Website: 211

Newsletter: 91

Other: 8

### Facebook:

	2023	2022	2021
Published Posts:	43	64	82
Reach:	6,529	5,948	499
Visits:	1,080	365	8
New Followers:	4	21	0
Median engagement/post:	15	13	8

### Instagram:

	2023	2022	2021
Published Posts:	9	19	82
Reach:	951	589	14
Visits:	78	64	1
New Followers:	13	0	0

11/09/2023

TO: Board of Trustees, Shorewood-Troy Library

FROM: Jennie Mills, Director

RE: Whistleblower Policy

A revised Whistleblower Policy is in the Board packet, naming the Board Vice-President (an office with no check signing powers, per the Board by-laws) and the Will County State's Attorney as the Auditing Officials.

### **Whistleblower Policy – Shorewood-Troy Public Library District**

The Shorewood-Troy Public Library District is committed to the highest standards of openness and accountability. An essential piece of accountability and transparency is a mechanism enabling staff to voice concerns responsibly and effectively, mainly regarding financial or legal matters. When an individual discovers information that they believe shows serious malpractice or wrongdoing within the organization, it should be disclosed internally without fear of reprisal. There should be arrangements to enable this to be done. This policy ensures no staff members feel disadvantaged in raising legitimate concerns.

This policy is intended to assist individuals who believe they have discovered fraudulent or unethical behavior or impropriety. It is also designed to protect staff from retaliatory actions for reporting said conduct, which is in the public's interest.

Concerns can include matters such as:

- Financial malpractice, fraud, or impropriety
- Failure to comply with legal obligations or statutes
- Dangers to health & safety or the environment
- Criminal activity
- Unethical behavior
- Attempts to conceal any of the above

Employees can choose to disclose to the auditing official of the Library or a government or law enforcement agency. This policy is not intended to prevent or discourage an employee from disclosing information to a government or a law enforcement agency if the employee has reasonable cause to believe that the information disclosed violates state or federal law, rule, or regulation.

#### Appointment of Auditing Official:

Per 50 ILCS 105/4.1, the Library Board appoints auditing officials. The Library Board hereby designates **the Board Vice-President** as the auditing official. The Board Vice-President is assigned to contact outside counsel or consultants to begin an initial investigation.

Should it become necessary, the Board Vice-President should make a report to law enforcement agencies or the Will County State's Attorney.

Staff who believe they have a concern that needs to be addressed should send it to the Board Vice-President, Vito Schultz, at [vitz123@outlook.com](mailto:vitz123@outlook.com) in writing. The Library Director will annually distribute the relevant portions of 50 ILCS 105/4.1 annually to staff.

**Addenda:**

**Public Officers Prohibited Activities Act**

**Section 4.1**

(50 ILCS 105/4.1)

Sec. 4.1. Retaliation against a whistleblower.

(a) It is prohibited for a unit of local government, any agent or representative of a unit of local government, or another employee to retaliate against an employee or contractor who:

- (1) reports an improper governmental action under this Section;
- (2) cooperates with an investigation by an auditing official related to a report of improper governmental action; or
- (3) testifies in a proceeding or prosecution arising out of an improper governmental action.

(b) To invoke the protections of this Section, an employee shall make a written report of improper governmental action to the appropriate auditing official. An employee who believes he or she has been retaliated against in violation of this Section must submit a written report to the auditing official within 60 days of gaining knowledge of the retaliatory action. If the auditing official is the individual doing the improper governmental action, then a report under this subsection may be submitted to any State's Attorney.

(c) Each auditing official shall establish written processes and procedures for managing complaints filed under this Section, and each auditing official shall investigate and dispose of reports of improper governmental action in accordance with these processes and procedures. If an auditing official concludes that an improper governmental action has taken place or concludes that the relevant unit of local government, department, agency, or supervisory officials have hindered the auditing official's investigation into the report, the auditing official shall notify in writing the chief executive of the unit of local government and any other individual or entity the auditing official deems necessary in the circumstances.

(d) An auditing official may transfer a report of improper governmental action to another auditing official for investigation if an auditing official deems it appropriate, including, but not limited to, the appropriate State's Attorney.

(e) To the extent allowed by law, the identity of an employee reporting information about an improper governmental action shall be kept confidential unless the employee waives confidentiality in writing. Auditing officials may take reasonable measures to protect employees

who reasonably believe they may be subject to bodily harm for reporting improper government action.

(f) The following remedies are available to employees subjected to adverse actions for reporting improper government action:

(1) Auditing officials may reinstate, reimburse for lost wages or expenses incurred, promote, or provide some other form of restitution.

(2) In instances where an auditing official determines that restitution will not suffice, the auditing official may make his or her investigation findings available for the purposes of aiding in that employee or the employee's attorney's effort to make the employee whole.

(g) A person who engages in prohibited retaliatory action under subsection (a) is subject to the following penalties: a fine of no less than \$500 and no more than \$5,000, suspension without pay, demotion, discharge, civil or criminal prosecution, or any combination of these penalties, as appropriate.

(h) Every employee shall receive a written summary or a complete copy of this Section upon commencement of employment and at least once each year of employment. At the same time, the employee shall also receive a copy of the written processes and procedures for reporting improper governmental actions from the applicable auditing official.

(i) As used in this Section:

"Auditing official" means any elected, appointed, or hired individual, by whatever name, in a unit of local government whose duties are similar to, but not limited to, receiving, registering, and investigating complaints and information concerning misconduct, inefficiency, and waste within the unit of local government; investigating the performance of officers, employees, functions, and programs; and promoting economy, efficiency, effectiveness and integrity in the administration of the programs and operations of the municipality. If a unit of local government does not have an "auditing official", the "auditing official" shall be a State's Attorney of the county in which the unit of local government is located.

"Employee" means anyone employed by a unit of local government, whether in a permanent or temporary position, including full-time, part-time, and intermittent workers. "Employee" also includes members of appointed boards or commissions, whether or not paid. "Employee" also includes persons who have been terminated because of any report or complaint submitted under this Section.

"Improper governmental action" means any action by a unit of local government employee, an appointed member of a board, commission, or committee, or an elected official of the unit of local government that is undertaken in violation of a federal, State, or unit of local government law or rule; is an abuse of authority; violates the public's trust or expectation of his or her conduct; is of substantial and specific danger to the public's health or safety; or is a gross

waste of public funds. The action need not be within the scope of the employee's, elected officials, board member's, commission member's, or committee member's official duties to be subject to a claim of "improper governmental action." "Improper governmental action" does not include a unit of local government personnel actions, including, but not limited to, employee grievances, complaints, appointments, promotions, transfers, assignments, reassignments, reinstatements, restorations, reemployment, performance evaluations, reductions in pay, dismissals, suspensions, demotions, reprimands, or violations of collective bargaining agreements, except to the extent that the action amounts to retaliation.

"Retaliate", "retaliation", or "retaliatory action" means any adverse change in an employee's employment status or the terms and conditions of employment that results from an employee's protected activity under this Section. "Retaliatory action" includes, but is not limited to, denial of adequate staff to perform duties; frequent staff changes; frequent and undesirable office changes; refusal to assign meaningful work; unsubstantiated letters of reprimand or unsatisfactory performance evaluations; demotion; reduction in pay; denial of promotion; transfer or reassignment; suspension or dismissal; or other disciplinary action made because of an employee's protected activity under this Section.

(Source: P.A. 101-652, eff. 7-1-21; 102-813, eff. 5-13-22.)

Address for complete Public Officers Prohibited Activities Act

<https://www.ilga.gov/legislation/ilcs/ilcs3.asp?ActID=689&ChapterID=11>



AcknowledgmentForm:

I have received the Whistleblower Policy and the Addenda:

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(Name)

(Date)

DRAFT

November 9, 2023

TO: Board of Trustees, Shorewood-Troy Library

FROM: Jennie Mills, Library Director

RE: Strategic Plan

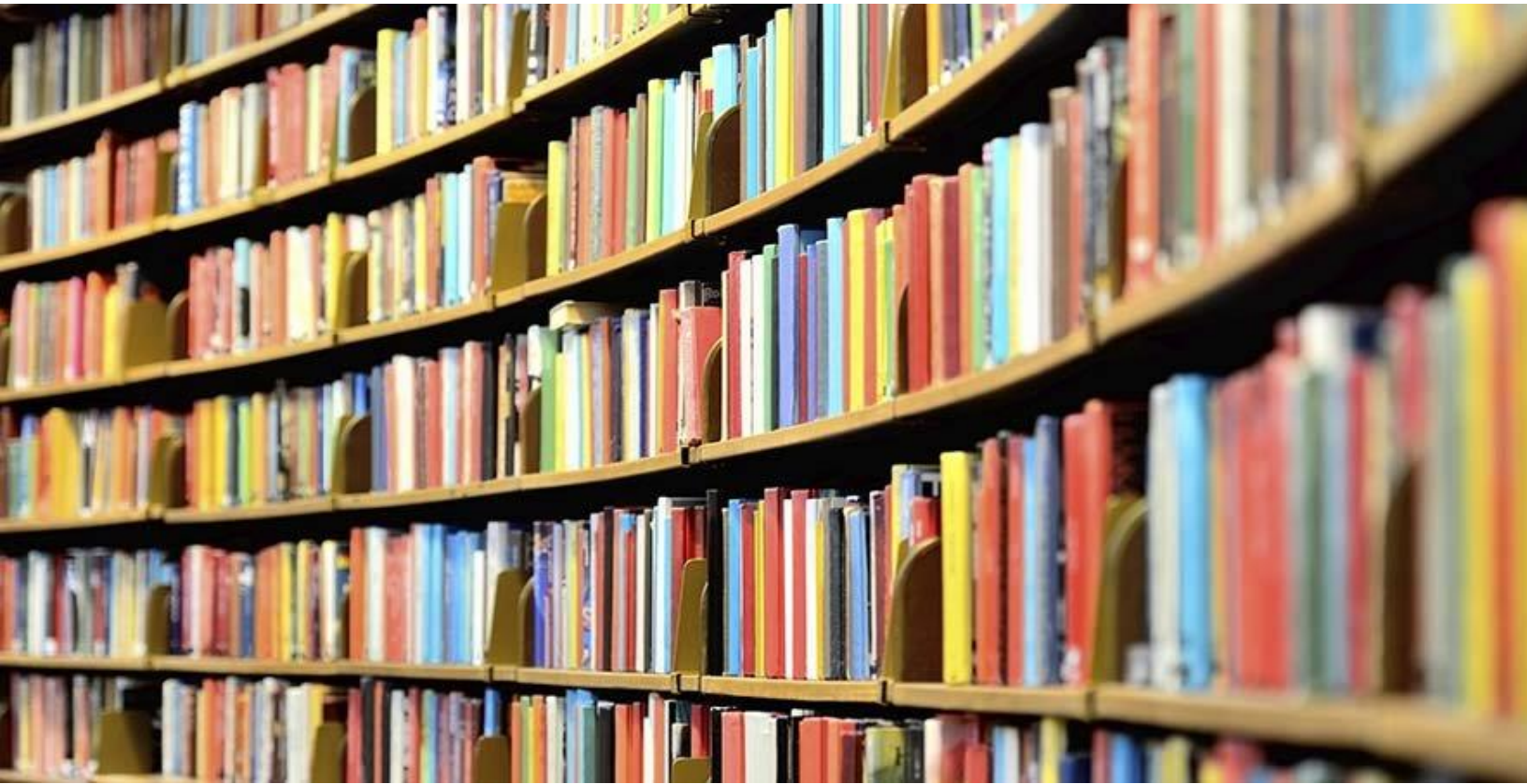
Ultimately, the other consultant that I spoke with did not provide a quote. Fast Forward Libraries, which did provide a comprehensive listing of libraries and other nonprofit groups that they worked with, provided an ala carte menu of options.

The Library Board could opt to do EVERYTHING and have FastForward do EVERYTHING, having the total cost be about \$22,000. Or, the Board could do only what the Board deems the most important elements, with the consultants providing templates, and have the total cost be \$8600 (or less than if the Board eliminates chunks of the project). For instance, an easy piece to eliminate could be the Community Focus groups (which is \$3000 for FastForward Libraries to do) and focus more on surveys instead.

I am happy to see if Ms. Standerfer could do a Zoom call at the next Library Board meeting to discuss options with the Board if the Board would like.

# Strategic Planning Proposal for the Shorewood-Troy Public Library

September 25, 2023



**Proposal submitted by:**



Amanda E. Standerfer, Founder and Lead Consultant  
Fast Forward Libraries LLC  
712 Arlington Ct.  
Champaign, IL 61820  
217-821-2880  
[amanda@standerferconsulting.com](mailto:amanda@standerferconsulting.com)  
[fastforwardlibraries.com](http://fastforwardlibraries.com)

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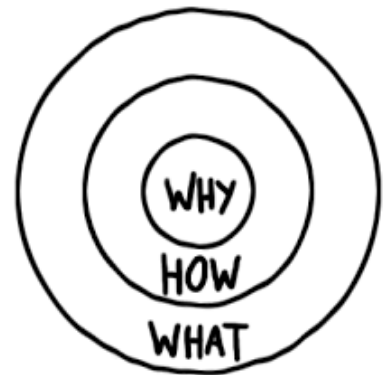
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## Cover Letter

I am pleased to submit this proposal to Shorewood-Troy Public Library (STPL) for strategic planning process facilitation and consulting. I am the founder and lead consultant for [Fast Forward Libraries LLC](#), a small consulting group specializing in assisting libraries and nonprofits over the past 20 plus years with focused, flexible planning processes to increase their performance and impact. Besides strategic planning, we assist organizations with fundraising and development planning, capacity building/organizational development, staff training and team building, data collection and analysis, and grant writing.

This proposal details a grounded research planning process that will result in a focused, actionable 3-5 year strategic plan for STPL. The Fast Forward Libraries team has extensive experience working with public libraries, and strives to be a neutral process facilitator and partner to maximize community and stakeholder input, reflection, and learning so the resulting strategic plan is compelling, responsive, and focused. We are steeped in organizational development methods and group dynamics, both essential elements of the strategic planning process. We specialize in processes leading to a graphical one-page strategic plan (see examples provided), which is vital for community and stakeholder communication and a visual reminder of the strategic direction during the life of the plan.

The graphical one-page plan is supported by an annual activity plan to guide the day-to-day management of the plan that roll up to the established strategic directions, mission, and vision. Using [Simon Sinek's "Golden Circle" \(Why? How? What?\)](#) model and PLA's new ["Strategic Planning for Public Libraries" by Joy L. Fuller](#)<sup>1</sup> as a framework for the process, stakeholders at all levels find connection and purpose in the plan which makes success achievable.



Each process we facilitate is customized to achieve shared goals. Helping libraries develop their strengths and become learning organizations is our passion because libraries are the anchor of democracy in our society and we need to evolve to respond to community needs in holistic ways that honor the complexities of our society. Adopting the practices of a learning organization during the planning process will equip STPL to be a flexible, nimble, and vital institution for decades to come.

It's exciting that STPL is engaging in strategic planning and considering library impact in the community. Strategic planning is a crucial development activity and will positively impact STPL for years to come. I think you will find that our proposal closely aligns with your needs. Please do not hesitate to email or call with any questions. I look forward to hearing from you!

**Amanda E. Standerfer**  
Founder & Lead Consultant

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<sup>1</sup> Our client [Indian Trails Public Library District](#) in Wheeling, Illinois is heavily featured in this new publication.

## Executive Summary

The Shorewood-Troy Public Library (STPL) seeks to engage in a collaborative, participatory planning process that will result in a comprehensive 3-5 year strategic plan for the library. After the uncertainty of the last several years, it's a good time to celebrate success, assess what's working, deepen community connections, and set a course for the next three plus years. Using a fresh, streamlined strategic planning process, STPL can consider what opportunities exist and how to evolve to increase impact in the community and broaden partnerships, especially focusing on reaching underserved populations through an appreciative inquiry and grounded research approach. To that end, this proposed learning-focused strategic planning process will result in a clear, adaptive plan that is grounded in the library's strengths to streamline decision-making and focus on impact.

In our approach, we use:

- [Systems thinking](#) - considering individual aspects of the library, how they interrelate, and what this means for overall dynamics and potential levers for change.
- [Design thinking](#) - putting humans as the core of the library's work.
- [Diversity, equity, and inclusion](#) - DEI is a critical foundational framework that is applied throughout the process.

The planning process is organized into three phases:

**LEARN:** Core to the planning process is learning. Learning requires research, information gathering, dialogue, and analysis. A considerable amount of time is devoted to learning during this process—both internally within the library, and externally out in the community—to help participants deeply connect with all things STPL. Our role as process facilitators is to direct learning activities and to serve as a neutral guide during the process.

*Internal learning:* Board and Staff members will have several opportunities to participate in and contribute to the strategic planning process during this phase including engaging in an environmental scan, SOAR (strengths, opportunities, aspirations, results) analysis, and survey.

*External learning:* Community input (qualitative and quantitative) will be gathered in multiple ways (TBD based on process design). We will concurrently engage in a community needs assessment process using focus groups and interviews to gain a view of what's on the minds of community members representing various stakeholders and groups, especially focusing on non-users. At the same time, we will conduct a community survey to get broad community input about library strengths and impact. In addition, we will compile data on community demographics and community organization strategies to give additional context to the process. We will look for strengths and connections to help Trustees and Staff consider STPL's role in new ways.

At the end of this phase, we'll summarize all data with findings in a Learning Report. The Learning Report is key to informing the agenda for the DREAM phase of the process.

**DREAM:** During this phase, Trustees and Staff members will synthesize the learning and dream about the future during retreat sessions. The retreat sessions allow for dedicated time and space to step back and think strategically, working through ideas together to build strategic plan elements. In addition, we'll review (and update if needed) the current vision and mission statements.

**DO:** Finally, the plan will start to take shape, and we'll spend time during this phase developing and revising documents and graphics that make the plan come to life. We'll develop an activity plan that will guide implementation over the life of the plan and help STPL think about the plan's narrative and milestones. We'll also develop an evaluation framework and talk about reporting structures to communicate success to stakeholders and the community.

The final product will be a comprehensive, data-driven, outcome-focused strategic plan with an accompanying one-page graphical version. The plan will be realistic in scope and includes a recommended activity plan draft with an evaluation framework. Committing to this process and way of operating will require clear communication and buy-in from Staff and the Board. The results will unify and energize all involved!

#### **A Note on COVID-19**

Planning always comes with unique challenges and opportunities for the organizations involved. Current events dictate further complications with renewed efforts to fight COVID-19 and its variants. As such, this plan relies on gathering community, staff, and stakeholder aspirations, wants, and needs using a hybrid of virtual engagement tools and, should conditions allow, in-person methods.

With extensive experience in virtual community engagement and collection of qualitative data, the consultants of Fast Forward Libraries can confidently deliver virtual engagement and planning activities when necessary. In our experience, there is no substitute for in-person conversations and engagement. However, virtual options remove some barriers and allow for collection of ideas and opinions from a more diverse pool of community members and stakeholders. When it is safe for communities and stakeholders to gather in person, our consultants will be there to lead activities. Ideally, a hybrid virtual/in-person approach will be adopted regardless of the effects of COVID-19.



## Your Strategic Plan Overview / Summary of Deliverables

<b>Deliverable</b>	<b>Purpose</b>
<b>Learning Report</b> <ul style="list-style-type: none"> <li>Comprehensive report of all data gathered during the initial phase of the planning process.</li> <li>Provides analysis and findings that helps Staff members and Trustees build strategic plan elements.</li> </ul>	<ul style="list-style-type: none"> <li>Key tool for informing strategic planning process.</li> <li>Summary to provide community members and stakeholders as support for strategic plan elements.</li> </ul>
<b>One-page Graphical Plan</b> <ul style="list-style-type: none"> <li>High-level graphical version of the strategic plan.</li> <li>Quick reference for: <ul style="list-style-type: none"> <li>Vision</li> <li>Mission</li> <li>Strategic Directions</li> <li>Goals</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>For communication about strategic direction.</li> <li>Use in library (as a flyer and poster), on website, and in publications.</li> <li>Use in Board reports as reminder of high-level strategy.</li> <li>Use in staff areas as reminder of high-level strategy.</li> <li>Use with library users/the community in publications and at meetings as a reminder of high-level strategy.</li> </ul>
<b>Strategic Plan Document</b> <ul style="list-style-type: none"> <li>This is the expanded, more traditional text-heavy strategic planning document for Board approval.</li> <li>It provides additional context and detail about the planning process and other plan components.</li> </ul>	<ul style="list-style-type: none"> <li>Use on your website as the “full plan” for community/stakeholders to review.</li> <li>Staff should have access to this document so they can understand their role in implementation.</li> </ul>
<b>Implementation Elements: Activity Plan and Evaluation Framework</b> <ul style="list-style-type: none"> <li>The activity plan is an internal document for staff members to use when planning annual activities that will help meet the plan goals, timeline, and staff responsibilities for the activity.</li> <li>The activity plan can also be used for internal updates/reports to streamline strategic plan management.</li> <li>The activity plan changes and is updated annually by staff.</li> <li>The evaluation framework breaks down which metrics will show progress for each goal.</li> </ul>	<ul style="list-style-type: none"> <li>Staff use the activity plan to detail annual activities and accomplishments.</li> <li>The activity plan can also be used to set individual performance goals.</li> <li>The activity plan can be used to develop progress reporting using template.</li> <li>Evaluation framework, aligned with goals, helps stakeholders understand metrics that show strategic plan success.</li> </ul>

## Key Personnel and Qualifications/Experience

### Amanda E. Standerfer, MA, MLIS



Amanda's passion is helping libraries and nonprofit organizations advance so they can create meaningful impact in their communities. Since 2002, Amanda has served as a consultant and facilitator, working with libraries, nonprofits, and small businesses on strategic planning, fundraising, organizational development, and capacity building (operating as a sole proprietor until formalizing as Fast Forward Libraries LLC in early 2022). Recent clients include [PrairieCat](#) (library consortium in Illinois), [Indian Trails Public Library District](#) (Wheeling, IL), and [Spring Lake District Library](#) (MI).

Amanda was most recently the Director of Community Engagement for [The Urbana \(IL\) Free Library](#). She's spent about half of her career working in philanthropy (as Program Officer for [The Lumpkin Family Foundation](#) based in Mattoon, IL and as Program Director with the [Southeastern Illinois Community Foundation](#), serving Effingham and Mattoon, IL) and the other half in libraries (as Head of the Adult Division at the [Decatur \(IL\) Public Library](#) and as Director of the [Helen Matthes Library](#) in Effingham, IL). She loves melding her library and philanthropy knowledge – a self-proclaimed “philanthro-brarian.”

Amanda has twice been elected to the Board of the [Illinois Library Association](#) (ILA), most recently completing a three-year term in 2016. Amanda was also selected as a member of the first class of *Synergy: The Illinois Library Leadership Initiative* and one of only two librarians ever selected for participation in *Leadership Illinois*.

Amanda holds a B.A. and an M.A. in history from [Eastern Illinois University](#) and an M.S. in library and information science from the [University of Illinois at Urbana-Champaign](#). You can find out more about Amanda on [LinkedIn](#).

Amanda is the lead consultant for this project and will manage all aspects of the process.

### Laura Huddleston, MLIS



Laura Huddleston is an associate consultant with Fast Forward Libraries. She has a special interest in the “how” of public libraries and loves to learn about ways they can thrive to benefit patrons and communities.

For ten years, Laura led the children's department at the Mattoon Public Library perfecting a few story time voices and the ability to find a title based on a two-word description. During her tenure, Laura managed collection development, various school/public collaborations, and all children's programming. She helped design and launch the MPL's inaugural Book Buggy mobile library to reach underserved youth and piloted the First Grade, First Card program to bring library cards to local first-graders. Laura served on the ISLMA Monarch Award Committee and received a 20 Under 40 Award from the Mattoon Journal Gazette for contributions to her community.

Laura recently served as Program Officer for Community Outreach and Organizational Learning at the Lumpkin Family Foundation where she led new efforts in trust-based philanthropy, impact evaluation, and organizational learning including a facilitated EDI process for board and staff.

Laura currently serves as a trustee of the Mattoon Public Library and as a community advisor for the Coles County Peace and Justice Fund. She holds a BA in Spanish and secondary education from Eastern Illinois University and an MLIS from Indiana University.

Laura is the project manager, providing research and logistical support, supports community input elements, and manages the development of the Learning Report.

### **Sarah Forbes, PhD.**



Dr. Sarah Forbes is the founding Director of Student Academic Success at [Rose-Hulman Institute of Technology](#), helping students to discover new strategies to achieve their academic goals. Prior to this, Sarah spent 10 years as the Director of Data Management and Reporting. Her role in the Office of Institutional Research, Planning and Assessment was to manage data collection and reporting to all functional units on campus as well as to external constituents. She also served as a liaison between Academic Affairs and Enterprise Information Technology, helping each group to identify their needs and streamline both data entry and reporting processes.

Prior to working at Rose-Hulman, Sarah worked at the [Helen Matthes Library](#) in Effingham, Illinois. There she focused on marketing, outreach, and adult education.

In her spare time, Sarah serves as a research consultant to non-profit organizations. Sarah earned a B.A. in Psychology from [McKendree University](#), an M.A. in Experimental Psychology from [Indiana State University](#), and a Ph.D. in Curriculum and Instruction from [Indiana State University](#).

Sarah assists with community survey development and compiles data for the Learning Report.

### **Jennie Grace, BFA**



Jennie Grace is the Graphic & Web Designer for [The Urbana \(IL\) Free Library](#), a position she's held since 2007. Jennie holds a BFA in graphic design from [Eastern Illinois University](#).

Jennie creates the one-page plan document.

## Work Plan

### Phase I: LEARN

The first phase of the strategic planning process is the longest and the most important! During this phase, we'll spend time gathering data internally and externally to inform the strategic planning process.

**Form the Planning Team:** First, we will establish the Planning Team (5-7 staff and Trustees) to work with Amanda to guide and manage the planning process. The Team meets regularly throughout the process (as a group and via email) to give input about various aspects of the process and to edit/refine process/plan documents. To get started, we'll hold a kick off meeting to finalize the timeline, get some initial input, and start planning the community survey and focus groups/interviews. The Planning Team will gather internal and external documents to inform the process, like library data, evaluation reports, previous strategic plan reports, community demographic data, and strategic plans for other community organizations.



**Board & Staff Process Orientation & Input:** It is key to generate excitement about the process with the Board and Staff and to involve them early in the process. To do this, we'll focus inward. Amanda will hold sessions with the Board and Staff to get them oriented to the strategic planning process and conduct an environmental scan, SOAR analysis (similar to a SWOT, but with an appreciative inquiry lens focusing on strengths, opportunities, aspirations, and results), and get input on what else we need to learn as part of the process. Paired with these sessions is a Board and Staff Survey to get insight into the library's working culture to start identifying strengths and gaps.

**Community Needs Assessment Focus Groups & Interviews:** To gather input from non-users, we will use a needs assessment approach. It is key to reach out to community stakeholders and groups working with underserved populations to ask for their assistance in organizing specific focus groups and encouraging participation in the process. These focus groups and interviews will give vital input into the process related to overarching community concerns that the library needs to consider during the planning process.

**Gather Community Feedback & Conduct Research:** At the same time as the community needs assessment process, we'll gather community and stakeholder feedback via a survey. The community survey is key to gaining a broad understanding of STPL's current state, strengths, and potential future direction from community members that care about the future of the library. Amanda will develop the community survey (edited and approved by the Planning Team) to get qualitative and quantitative input on:

1. **Awareness of Library Services** – How aware are respondents of the various library services? Where do they learn about what's going on at the library? (This data can be benchmarked for future evaluations.)
2. **Value and Satisfaction** – What aspects of STPL's work do respondents value the most? Are they satisfied with STPL's work? (This data can be benchmarked for future evaluations.)
3. **Community Needs** – What are top community needs? How might the library address these needs?
4. **Future Focus** – What's important going forward? What are STPL's strengths? How should STPL measure success?
5. **Other relevant questions** – Operating hours? Facilities? Accessibility? Support of a future referendum? TBD by the Planning Team

In addition, we'll compile community demographic data and complete a scan of community organization strategic plans to identify needs, opportunities, and gaps.

At the end of this phase, Amanda, Sarah, and Laura (with assistance from library staff) will gather all information into a Learning Report. The Learning Report will identify library strengths and provide findings that will ground the Board and staff retreats in the next phase.

<b>Deliverables:</b>	Finalized planning process timeline with meeting dates. Learning Report that includes analysis and findings from information gathered/reviewed, survey, focus groups, and interviews. Regular check-ins with Library Director.
<b>Timeframe:</b>	December 2023 – April 2024

**Phase II: DREAM**

This phase starts with a Planning Team meeting to review the Learning Report and plan for the Board and staff retreats.

**Board Retreat Session:** The 3-hour Board retreat will focus on reviewing learning and dreaming about the future. During the retreat, we'll get the Board up to speed on the planning process, review and discuss the Learning Report, review and update the vision, mission, affirm strategic directions, and set plan goals. During the session, the Board will also talk about possible activities that will help achieve plan goals. We'll use our time to critically think about what's most important for STPL, including new services that will address priorities, services to discontinue, capacity building strategies, methods of outreach that might attract underserved populations, and funding implications.

**Staff Retreat Session(s):** During this phase, we'll also hold a 3-hour staff retreat (or multiple, shorter retreats to maximize staff participation) to also share the Learning Report and dream about the next 3 years. Staff will spend time brainstorming activities that will help achieve plan goals. This input is valuable to the activity plan that will guide implementation. (Note: While it's best to have the Board retreat before the staff retreat, we are flexible with the timeline for these sessions as which retreat is held first is not critical for the overall development of the plan.)

It's important that everyone feel engaged at the retreats and that their perspectives are expressed and respected, so the facilitation will be flexible to accommodate for multiple input methods. At the end of the sessions, participants will feel confident that STPL is on the right track for transformative change, rooted in strategies for equity, innovation, and flexibility in the delivery of library services.

The final piece of this phase is another Planning Team meeting to debrief on the retreats and discuss a draft strategic plan outline.

<b>Deliverables:</b>	Board and staff retreat sessions. Strategic plan outline. Regular check-ins with Library Director.
<b>Timeframe:</b>	April – May 2024

**Phase III: DO**

In this phase, we'll draft and revise the various plan documents. Amanda, Laura, and Jennie will prepare drafts of the graphical and written versions of the plan and the activity plan. The Planning Team will review and edit the drafts. In addition, we will share the drafts with key staff and stakeholders for feedback.

After Planning Team review, we'll present the draft plan documents to the Board for final comment/revisions. This session will allow the Board to clarify next steps and discuss an implementation and communication strategy for the plan.

After the Board session, Amanda will make revisions and present final plan documents for approval. Final implementation steps, like finalizing the activity plan, and developing the evaluation framework will take place with the Planning Team around the time of Board approval to move from strategic planning to implementation.

<b>Deliverables:</b>	All draft plan documents approximately one month after the retreat sessions with final documents presented a month after presentation of the drafts. Regular check-ins with Library Director.
<b>Timeframe:</b>	June – July 2024

**Phase IV: IMPLEMENTATION**

Transitioning from the planning process to implementation is critical and often where the library’s management team gets stuck. Without a clear plan of how to transition to implementation, a strategic plan can get set aside and the momentum of the planning process is lost. We recommend reading [“Managing Transitions: Making the Most of Change” by William Bridges](#) for guidance during this period. Amanda is also available for transition coaching support for the Library Director or staff teams working on implementation plans.

**Exclusions or Exceptions**

Fast Forward Libraries is pleased to offer Spanish translation of the community survey for an additional fee (see the Work Plan). Unfortunately, at this time, no other languages are available.

Fast Forward Libraries excludes any interpretation service related to the focus groups or interviews. The library is responsible to provide any on-site interpretation services required.

Fast Forward Libraries excludes any cost related to the printing and/or mailing of the community survey. A print-ready version of the survey will be provided upon survey launch and the library can print and distribute this version at the library and throughout the community. While a mailed survey is not recommended, the library may choose to print and mail the survey at their own expense. The library might want to consider a postcard mailing to the community to inform them about the online survey (this type of mailing is less costly and has been effective in other communities). Fast Forward Libraries would advise the library during this process, but not be responsible for any cost associated with the final product. In addition, the library is responsible for entering all printed surveys into Survey Monkey.

## Schedule of Costs and Timeline

Phase I: LEARN				
Goal: To finalize the planning process and receive community/stakeholder feedback that will inform the strategic planning process.				
<u>What</u>	<u>Who</u>	<u>When/Duration</u>	<u>Option 1: Consultant -led</u>	<u>Option 2: Staff-led</u>
<b>Planning Team Kick-Off Meeting:</b> Review process and timeline, discuss information gathering needs, and initial information gathering.	Amanda and Planning Team	December 2023 <i>2 hours preparation 2-hour meeting (via Zoom videoconference) 1 hour follow-up</i>	\$500	\$500
<b>Community Survey Development and Administration:</b> Develop survey instrument and refine with Planning Team. Administer and monitor survey with Planning Team assistance with link distribution.  <i>*Print survey available for distribution. Library staff enter responses.  **Mailed survey not recommended. Mailing cost not included.  ***Spanish translation of SurveyMonkey version of the community survey is available for \$1,500. This includes a paper version of the survey for the library to print on-demand.</i>	Amanda, Laura, and Sarah with assistance from Planning Team	January 2024 <i>20 hours survey development 10 hours survey administration/monitoring Email/phone meeting(s) as needed</i>	\$3,000	\$200 (Amanda provides examples, staff administers survey)
<b>Initial Board and Staff sessions:</b> Conduct environmental scan, SOAR analysis, and get input on vision and mission.	Amanda	February 2024 <i>4 hours preparation 1.5-hour session with Board (via Zoom videoconference) 1-hour session with staff (via Zoom, may need multiple staff sessions) 2 hours follow-up</i>	\$1,000	\$100 (Amanda provides agenda and worksheets, staff conduct sessions)

<b>Board and Staff Survey:</b> Develop and administer survey/s as approved by Planning team specific to internal feedback, especially related to future training needs of staff.	Amanda and Laura with assistance from Planning Team	February 2024 <i>8 hours survey development, administration, and monitoring</i>	\$800	\$100 (Amanda provides template, staff administer survey)
<b>Community Needs Assessment – Focus Groups and Interviews:</b> 3 focus group sessions (one-hour each, in-person) and up to 6 interviews (15-30 minutes each, via phone), develop focus group/interview questions, review agenda with Planning Team, compile notes.	Amanda (with logistical assistance from Planning Team)	February – March 2024 <i>2 hours preparation 3 1-hour sessions (in-person) 6 15-30-minute interviews 4 hours notes/reporting 1 day on-site</i>	\$3,000	\$200 (Amanda provides agenda, staff conducts sessions/ interviews)
<b>Learning Report:</b> Develop report that analyzes and synthesizes all information gathered (including library and community data supplied by library staff).	Amanda and Laura with editing assistance from Planning Team	April 2024 <i>30 hours learning report</i>	\$3,000	\$200 (Amanda reviews and edits report that staff develops)
<b>Phase I total (inclusive of supplies and travel):</b>			<b>\$11,300</b>	<b>\$1,300</b>



## Phase II: DREAM

**Goal:** To report learning to the Board and staff and build plan elements at retreat sessions.

<u>What</u>	<u>Who</u>	<u>When/Duration</u>	<u>Option 1: Consultant- led</u>	<u>Option 2: Staff-led</u>
<b>Planning Meeting:</b> Review Learning Report and prepare for Board and staff retreats.	Amanda and Planning Team	April 2024 <i>1 hour preparation 1-hour meeting (via Zoom videoconference) 1 hour follow-up</i>	\$300	Same as consultant-led
<b>Board Retreat Session:</b> 3-hour, in-person session with Board to review learning and develop strategic plan elements.	Amanda	May 2024 <i>4 hours preparation 3-hour meeting with Board 2 hours follow-up 1 day on-site</i>	\$3,000	Same as consultant-led
<b>Staff Retreat Session:</b> 3-hour, in-person session (if gathering all staff in one meeting is not possible, we can hold multiple, shorter sessions to maximize participation) with staff to review learning, review strategic plan elements, and brainstorm activities to achieve plan goals.  <i>*To keep travel costs low, the Board and staff retreat sessions will be held on consecutive days.</i>	Amanda	May 2024 <i>4 hours preparation 3-hour meeting with staff 2 hours follow-up 1 day on-site</i>	\$3,000	Same as consultant-led
<b>Planning Team Debrief Meeting:</b> Check-in with Planning Team to review strategic plan outline document.  <b>Deliverable:</b> Strategic plan outline.	Amanda and Planning Team	May - June 2024 <i>4 hours preparation 1-hour meeting (via Zoom videoconference) 1 hour follow-up</i>	\$600	Same as consultant-led
<b>Phase II total (inclusive of supplies and travel):</b>			<b>\$6,900</b>	<b>\$6,900</b>

### Phase III: DO

**Goal:** To develop and refine all plan documents, develop activity plan aligned with evaluation framework, and prepare for plan approval.

<u>What</u>	<u>Who</u>	<u>When/Duration</u>	<u>Option 1: Consultant-led</u>	<u>Option 2: Staff-led</u>
<b>Document Development:</b> Develop graphical and written plan for review by Board.  <b>Deliverable:</b> Draft plan documents for Board review.	Amanda and Laura	June 2024 <i>30 hours</i>	\$3,000	\$200 (Amanda provides examples and reviews staff drafts)
<b>Board Meeting:</b> Meeting with Board to review all plan documents and make final revisions.  <b>Deliverable:</b> Final plan documents for Board approval.	Amanda with Board	June or July 2024 <i>2 hours preparation Up to 1 hour meeting with Board (via Zoom) 2 hours follow-up</i>	\$500	\$0 (staff design presentation)
<b>Activity Plan and Evaluation Framework:</b> Develop draft documents for review by Director/Planning Team.  <b>Deliverable:</b> Draft evaluation framework.	Amanda and Director/Planning Team	July 2024 <i>1-hour meeting with Director/staff 6 hours document development</i>	\$700	\$200 (Amanda provides examples and reviews staff drafts)
<b>Phase III total (inclusive of supplies):</b>			<b>\$4,200</b>	<b>\$400</b>
<b>Grand total: (inclusive of supplies and travel):</b>			<b>\$22,400</b>	<b>\$8,600</b>

## References

**Mr. Brian Shepard**

Executive Director  
Indian Trails Public Library District  
Wheeling, IL  
847-279-2202  
[bshepard@indiantrailslibrary.org](mailto:bshepard@indiantrailslibrary.org)

Facilitated comprehensive strategic planning process for public library serving 67,000 residents.

**Ms. Donna Richards**

Board President  
Pollard Memorial Library  
Lowell, MA  
978-502-7373  
[Donna.S.Richards@gmail.com](mailto:Donna.S.Richards@gmail.com)

Provided facilitation for strategic planning process for public library serving 111,306 residents.

**Ms. Carolyn Coulter**

LLSAP Services Manager / Director  
PrairieCat (Illinois)  
309-623-4176  
[carolyn.coulter@railslibraries.info](mailto:carolyn.coulter@railslibraries.info)

Provided strategic planning facilitation for multi-type library automation consortium.

**Mr. Joel Horwedel**

Executive Director  
Lincoln Memorial Garden  
217-529-1111  
[joel@linconmemorialgarden.org](mailto:joel@linconmemorialgarden.org)

Provided strategic planning facilitation for regional nature center that included community engagement and a Board retreat.

*I am happy to provide contact information for any client listed on the following page – just ask!*

## Library Strategic Planning:

- Allegan District Library (MI)
- Athens Regional Library System (GA)
- Bellwood Public Library (IL)
- Bensenville Community Public Library (IL)
- Black River Falls Public Library (WI)
- Bloomfield Township Library (MI)
- Carlock Public Library District (IL)
- Cary Area Public Library District (IL)
- Chillicothe Public Library District (IL)
- Cheltenham Township Library System (PA)
- Crystal Lake Public Library (IL)
- Des Plaines Public Library (IL) (department-level strategic planning)
- Duluth Public Library (MN) – Every Child Ready Duluth Initiative
- Dunlap Public Library District (IL)
- Elk Grove Village Public Library (IL)
- El Paso District Library (IL)
- Farmington Community Library (MI)
- Fondulac District Library (IL)
- Fossil Ridge Public Library District (IL)
- Fountaindale Public Library District (Bolingbrook, IL)
- Franklin Public Library (MI)
- Helen Plum Library (Lombard, IL)
- Highland Park Public Library (IL)
- Hollis Social Library (NH)
- Holly Township Public Library (MI)
- Indian Prairie District Public Library (Metamora, IL)
- Indian Trails Public Library District (Wheeling, IL)
- Kewanee Public Library (IL)
- LACONI (continuing education consortium in northern Illinois)
- La Grange Public Library (IL)
- Lakeland Library Cooperative (ILS only) (Grand Rapids, MI)
- Lake Villa District Library (IL)
- Lapeer District Library (MI)
- LibraryLinkNJ
- Mahomet Public Library (IL)
- Minnesota Library Association
- Minnesota Multicounty Multitype Library Systems
- Mt. Zion Public Library District (IL)
- Nashua Public Library (NH)
- Norfolk Public Library (NE) Palatine Public Library District (IL)
- Orien Township Public Library (MI)
- Oswego Public Library (NY)
- Otsego District Public Library (MI)
- Paw Paw District Library (MI)
- Peter White Public Library (MI)
- Pinnacle Library Cooperative (IL)
- Plainfield Public Library District (IL)

## Library Strategic Planning (con't):

- Pollard Memorial Library (Lowell, MA)
- Portage District Library (MI)
- PrairieCat ILS (northern IL)
- Prairielands Library Exchange (MN)
- Resource Sharing Alliance NFP (central IL)
- Richland Community Library (MI)
- River Forest Public Library (IL)
- River Valley Public Library District (IL)
- Round Lake Area Public Library District (IL)
- Santa Clara City Library (CA)
- Schaumburg Township District Library (IL)
- Southwest Michigan Library Cooperative (MI)
- Spring Lake District Library (MI)
- Three Rivers Public Library District (Minooka, IL)
- Tippecanoe County Public Library (Lafayette, IN)
- Traverse des Sioux Regional Library System (MN)
- The Urbana Free Library (IL)
- Utah Library Association
- Viking Library System (MN)

## Library Organizational Capacity Building:

- Addison Public Library (IL) (culture code)
- Broadview Public Library District (IL, community survey)
- Elmhurst College (IL) (Staff retreat)
- Grayslake Area Public Library District (IL) (unified service desk reorganization)
- Grayslake Area Public Library District Foundation (IL) (capacity building)
- Helen Plum Library (Lombard, IL) (culture code)
- Indian Prairie Public Library (IL) (Board and Staff retreat facilitation)
- Indian Trails Public Library District Foundation (Wheeling, IL) (fundraising planning)
- Lillie M. Evans Public Library District (Princeville, IL, focus groups)
- Mahomet Public Library (IL) (fundraising planning)
- Palatine Public Library District (IL) (culture code)

## Library Training, Workshop, Webinar, or Coaching:

- Alaska State Library DirLead (director's retreat)
- Bloomington Public Library (IL) (fundraising capacity building)
- Fast Forward Library Leadership Cohort (leadership development program – two sessions annually)
- Herrick District Library (MI) (facilitation)
- Illinois Library Association (Trustee Day programs)
- InfoPeople (webinar)
- LACONI consortium in northern IL (strategic planning workshop)
- Next Level Library Leadership Institute (FL) (coaching)
- Reaching Across Illinois Library System (webinar)

**LSTA 5-year Evaluation Projects:**

Idaho Commission for Libraries (2021)

**Nonprofits (strategic planning facilitation unless noted):**

- Champaign County Design and Conservation Foundation (IL)
- Coles County Habitat for Humanity (Charleston, IL, board retreat)
- Coles County United Way (Mattoon, IL, board reorganization and strategic planning)
- Effingham County Museum (IL)
- Family Service of Lake County (IL)
- Fit-2-Serve (Mattoon, IL)
- Illinois Environmental Council / Education Fund
- Illinois Stewardship Alliance (Springfield, IL)
- The James Project (Springfield, IL)
- Kidzeum (Springfield, IL)
- Lincoln Memorial Garden (Springfield, IL)
- Mid Illinois Big Brothers Big Sisters (Effingham, IL division)
- Sugar Grove Nature Center (IL)
- Sullivan Chamber and Economic Development (IL, board retreat and strategic planning)



# LEARNING REPORT

Peter White Public Library  
September 2022

Submitted by

[Fast Forward Libraries LLC](#)

Amanda E. Standerfer, MA, MLIS;  
Rachel Fuller, M.Ed., MLIS; Kristin  
Traniello, MLIS, and Stuart Fraser, MLIS

## Executive Summary

The Peter White Public Library launched a strategic planning process in April 2022. As part of the process, the library devoted a significant amount of time listening to community needs and interests to inform and guide the process. This report represents a summary of the data gathered directly and indirectly using various tools and methods from the community and the library's Board of Directors and staff during this phase of the process. Sections in the report include:

- An [introduction](#) and context with library usage statistics and trends and community demographics,
- A summary of an [environmental scan exercise and SOAR analysis](#) (strengths, opportunities, aspirations, and results) that Board and staff members participated in,
- Summaries of a [community survey](#) and [Board/TAC and staff survey](#),
- Highlights from [focus groups](#),
- A review of other [community organization strategic plans](#), and
- An appendix with more complete [community demographic data](#).

### *Library Statistics*

Due to the beginning of the COVID-19 pandemic, regular checkouts dipped by almost 40% in FY19/20. FY20/21 saw a healthy rebound as pandemic mandates waned, but the number did not surpass pre-pandemic levels. After a steady increase in Patron Initiated ILL borrowing from FY16/17 to FY18/19, numbers dipped during FY19/20, and then shot to a five-year high in FY20/21. Unlike ILL, MelCat borrowing stayed steady and MelCat lending jumped up in FY19/20. Average Registered Borrowers trended downward in FY19/20 and FY20/21. In FY20/21, there were about 9% fewer borrowers than in FY18/19. FY20/21 saw five-year lows for total library attendance and program attendance. FY20/21 total attendance was about 68% lower than the five-year high in FY16/17. FY20/21 program attendance was about 48% lower than the five-year high in FY16/17. Directional and reference questions had been decreasing before the pandemic, with the most significant drop between FY17/18 and FY18/19. Numbers dropped further in FY19/20, and rebounded slightly in FY20/21.

### *Community Demographics*

Overall, the population of the region is getting older, with median age increasing above the national level in all townships from 2010 to 2020. Marquette Township, Sands, and West Branch saw increases in the percentage of their populations living alone, including householders over 65 living alone. Between 2010 and 2020, median household income rose in all areas the library serves except Sands Township. All areas increased their percentage of the population identifying as Two or More Races. In Sands Township, the percentage of the population identifying as Hispanic increased. Between 2010 and 2020, the percentage of the population that is married decreased significantly in Chocolay, the City of Marquette, and Sands, while increasing in Marquette Township and West Branch.

Between 2010 and 2020, both Marquette Township and Sands experienced significant declines in their employed populations due to residents no longer being in the labor force rather than unemployed. Poverty affects many in the library's service area, especially in the City of Marquette, Sands, and West Branch. The percentage of the population earning degrees increased between 2010 and 2020. In all areas in the region, the percentage of the population that speaks English only remained above 90% and is significantly higher than the national level.

### *Environmental Scan/SOAR Analysis*

In June 2022, staff and Board members identified numerous political, economic, social, technology, legal, and library sector issues that could potentially impact the future of Peter White Public Library. The Library Sector boasts exciting new trends in eliminating fines, increasing programming, and balancing digital and physical materials. Social division, high costs of goods and services, pandemic-related challenges, rapid technological change, and first amendment rights are only a fraction of the issues shaping the context in which the library is choosing its new strategic directions and goals.

Peter White Public Library aspires to be a welcoming space that is fiscally healthy. The library wants to see public trust in the library, staff retention, and a well-informed community. Peter White Public Library's current strengths include its facilities, volunteer and donor base, and customer service, among others. Some opportunities for the library include marketing and promotions, partnerships, staff training, and more.

### *Community Survey*

A total of 245 individuals completed a community survey. Almost 96% of respondents indicated they were satisfied or very satisfied with the library. Unsurprisingly, a similar percentage of respondents said they felt welcome at the library. Participants highly value the library's collections, staff, youth services, programming, and aesthetic and atmosphere. Lack of free time, fines, inaccessible materials, and limited collections are barriers to respondents using the library. Respondents want the library to focus resources on print materials and children and teen programming over the next few years. Participants expressed the most interest in new services like a local history room and/or collection, a children's winter reading program, and a way for participants to convert older technology to current mediums. Participants are concerned about affordable housing, food insecurity, environmental issues, and childcare shortages in the community and have provided several ways the library could help address these issues.

### *Focus Group Summary*

During the week of June 13, 2022, Peter White Public Library held community focus groups with 25 participants. Discussions centered around aspirations participants had for the library and community and how to achieve those aspirations with support from the library. Participants' aspirations included uniting the community; creating a vibrant and welcoming community; and



supporting families. Lack of affordable housing and high cost of living were the most emphasized challenges to reaching the community's aspirations. Despite these challenges and obstacles, participants see a variety of ways the community can change to reach its aspirations. The community would benefit from more childcare options, cultural activities like "concerts in the park," coordinated community events, and public-private partnerships. The library can empower the community to enact change through technology access, technology support, career and job search assistance, makerspaces, and self-directed learning opportunities. Focus group participants most value the library's welcoming and inclusive space; excellent staff; local history collection; teen room and council; and accessible materials, books and beyond. To reach more people in the community, participants think the library can diversify marketing avenues; leverage Board, staff, and patron networks; and create fun and impact ways for people to engage with the library.

### *Board and Staff Survey*

Seven board members and 26 staff members participated in a survey. Respondents love helping their community and working with supportive colleagues. They are proud of the library's customer service, public engagement, programming, and policy development. Staff wages, fundraising, and staff retention were the three most important things they believe the library should focus on for the library's future. In addition to these priorities, they would also like to see things like increased community engagement, enhanced internal and external communications, staff cross-training, and more diverse patrons. Respondents said meeting spaces, career support, youth mental health support, technology training, and mobile library services were some of the most pressing community needs. Ways to better support staff were reiterated many times and included things like health benefits, increased wages, diversity training, equitable treatment, and more.

### *Review of Community Organization Strategic Plans*

Organizations in Peter White Public Library's service are provided ample opportunities for partnerships which would allow the library to contribute its spaces, expertise, and position within the community to serve the information needs and strengthen the community health of Marquette and the surrounding townships. Strengthening the relationship between the library and Marquette Area Public Schools would help the library stay informed of the needs of younger readers and the support they could provide to teachers. The library can also support regional public health goals by distributing health information to seniors and educating teens about the harms of vaping. The library can also partner with the City of Marquette on arts and culture initiatives as a path for economic development.



## Introduction

The Peter White Public Library was founded in 1871 and is the largest public library in the fifteen counties of Michigan's Upper Peninsula, serving around 37,000 people. In addition to their regular holdings, they house special collections in children's literature: the Mary Ann Paulin Children's Book Collection and Jessie Gay Van Cleve Collection of Vintage Children's Literature. These collections are shelved in a 10-person conference room. Additionally, the library offers three group study rooms, a Memory Lab for the digitization of personal materials, a recording booth, and a seed library. Their grounds have two volunteer-maintained gardens. Services offered by the library include two book clubs (Tasty Reads and Global Geeks); hosting community conversations; proctoring, passport, and notary public services; and sponsoring the Great Lakes Poetry Festival.



On the whole, the population of the region is getting older, with median age increasing above the national level in all townships. Skandia and West Branch both experienced a 10-year increase in median age between 2010 and 2020. Only the City of Marquette median age decreased during that time and is lower than the national and state levels. Sands Township saw a dramatic rise in the percentage of its population in all age brackets above 70 years old, while Skandia saw a large increase in its population of 70 to 74-year-old citizens. Marquette Township, Sands, and West Branch also saw increases in the percentage of their populations living alone, including householders over 65 living alone.

Between 2010 and 2020, median household income rose in all areas the library serves except Sands Township, which was already on par with the national average. Chocolay, Marquette Township, and Sands are all above the state average, but only Chocolay and Sands are also above the national average.

In Marquette and all townships, the percentage of the population identifying as White alone remained substantially higher than the national and state averages. Chocolay and Marquette Townships saw some decrease in their White Alone population. All areas increased their percentage of the population identifying as Two or More Races. In Sands Township, the percentage of the population identifying as Hispanic increased, but it is still under the national and state levels.

Between 2010 and 2020, the percentage of the population that is married decreased significantly in Chocolay, the City of Marquette, and Sands, while increasing in Marquette Township and West Branch. The percentage of the population that is divorced or separated more than doubled in Sands Township, while decreasing in West Branch. The percentage of the widowed population decreased significantly in Chocolay and Marquette Townships, while dramatically increasing in Sands Township. The percentage of households with a married

couple family decreased in Chocolay, City of Marquette, Sands, and Skandia, though in all areas other than the City of Marquette, these percentages are above state and national levels.

Between 2010 and 2020, both Marquette Township and Sands experienced significant declines in their employed populations. However, this corresponded with similar increases in their population no longer in the labor force rather than significant increases in unemployment. West Branch Township saw a significant increase in employment and decrease in unemployment.

Poverty effects many in the library's service area, especially in the City of Marquette, Sands, and West Branch. The percentage of people below the poverty line in the City of Marquette is over twice the national level. Between 2012 and 2020, the percentage in West Branch has decreased significantly from 31.2% to 20.4% but is still much higher than the state and national averages. For both the City of Marquette and West Branch, the percentages are above average for the population under 18 years as well as 18 to 64 years, with 44.4% of the under 18 population of West Branch living below the poverty level. The City of Marquette, Marquette Township, and West Branch all decreased their percentages of the population over 65 under the poverty level, but this population increased in Sands Township.

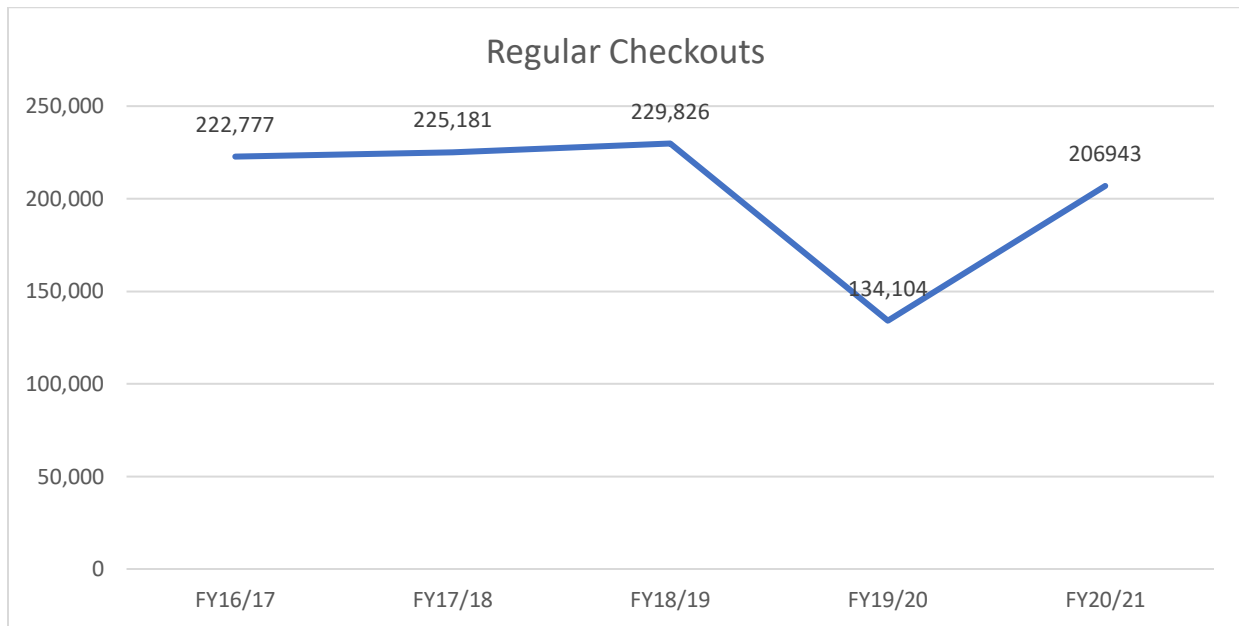
The percentage of the population earning degrees increased between 2010 and 2020. In Marquette Township, the percentage of the population with Some college or an Associate's degree increased significantly, while Chocolay, the City of Marquette, Skandia, and West Branch experience increases in the percentages of the population with a Bachelor's degree. The percentage with less than a high school graduate degree decreased in all locations and is under both national and state levels.

In all areas in the region, the percentage of the population that speaks English only remained above 90%, and is significantly higher than the national level. Only in Marquette Township did the percentage of the population responding that they speak English less than "very well" increase to above the state average.<sup>1</sup>

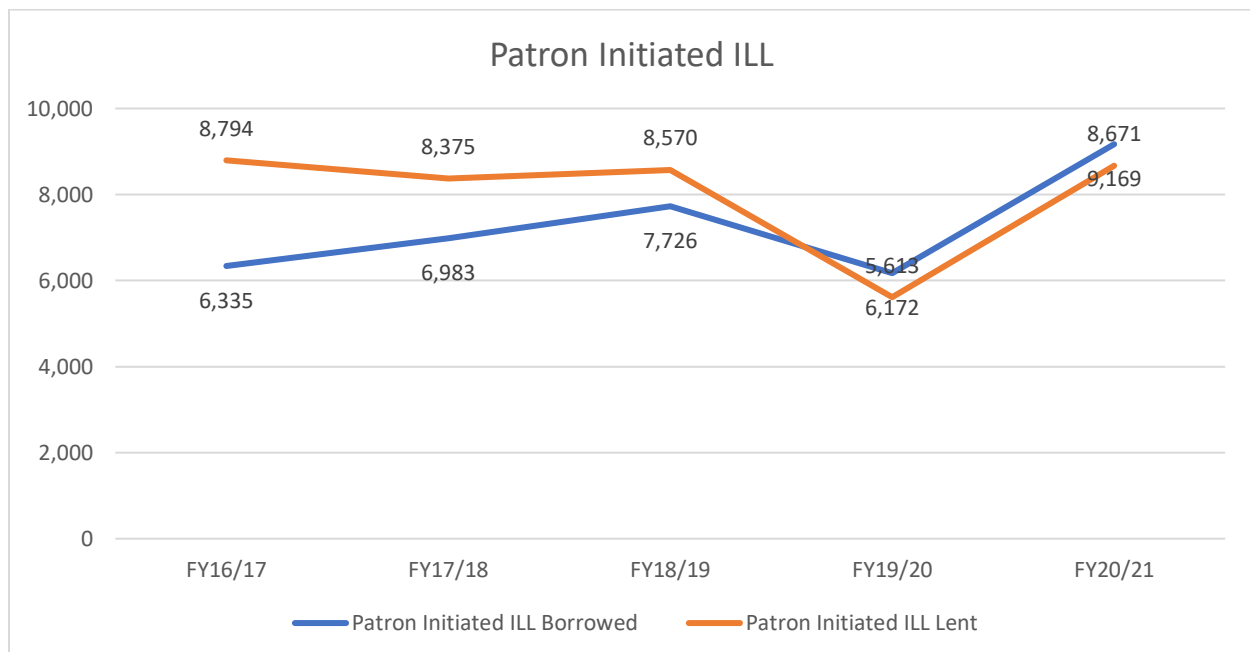
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<sup>1</sup> Please see complete demographic profile in the Appendix.

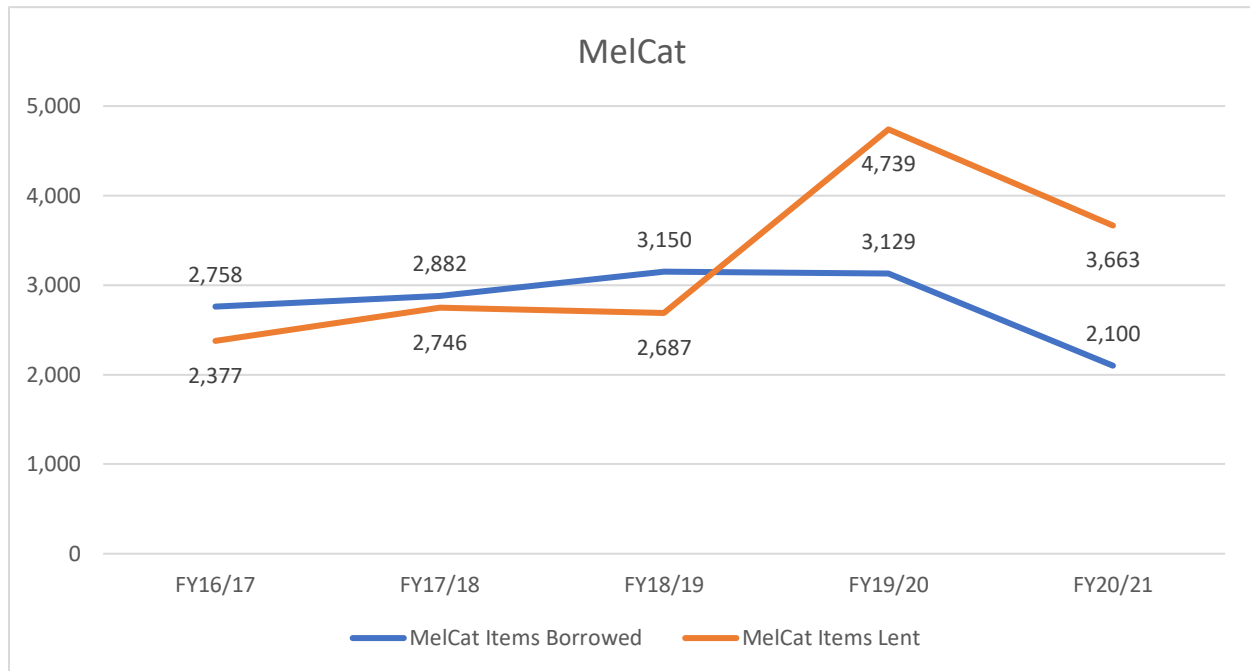
Due to the beginning of the COVID-19 pandemic, regular checkouts dipped by almost 40% in FY19/20. FY20/21 saw a healthy rebound as pandemic mandates waned, but the number did not surpass pre-pandemic levels.



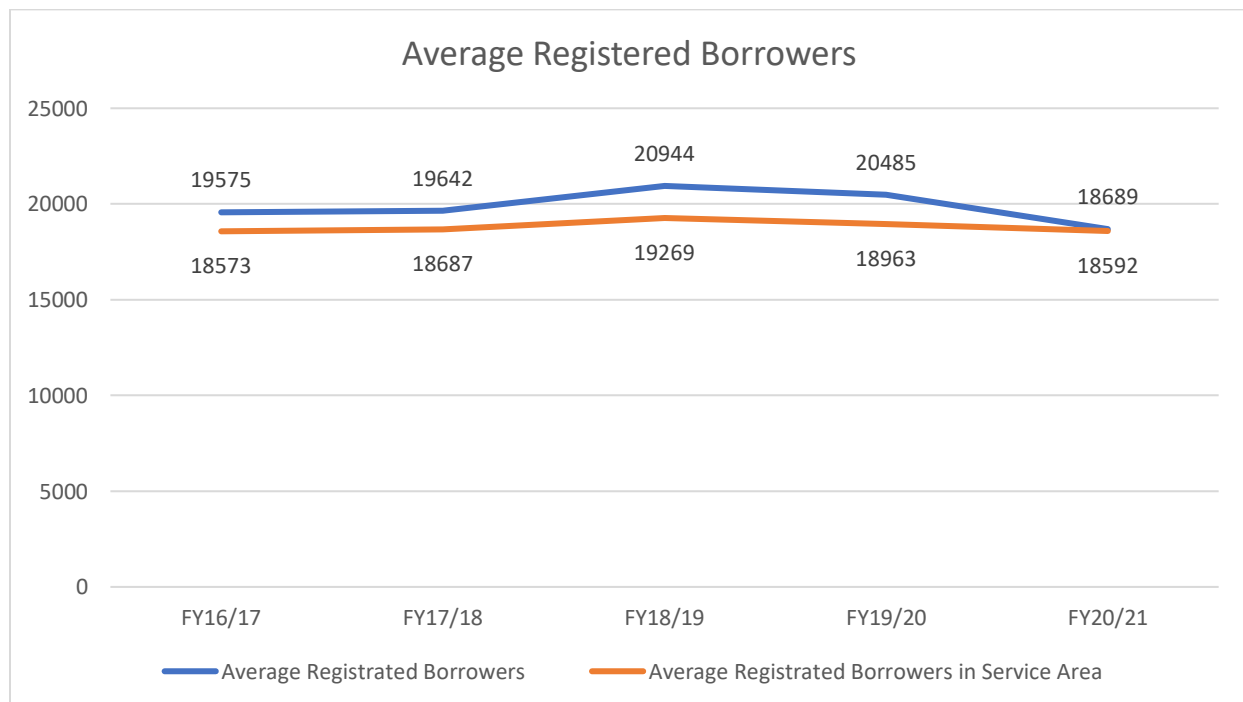
After a steady increase in Patron Initiated ILL borrowing from FY16/17 to FY18/19, numbers dipped during FY19/20, and then shot to a five-year high in FY20/21.



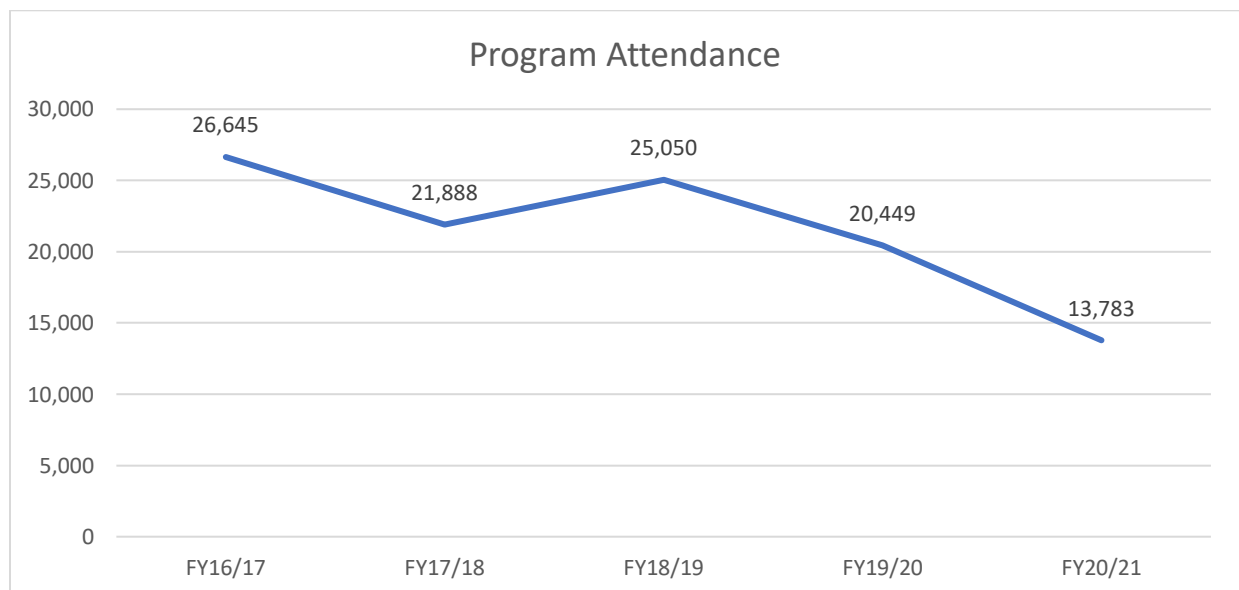
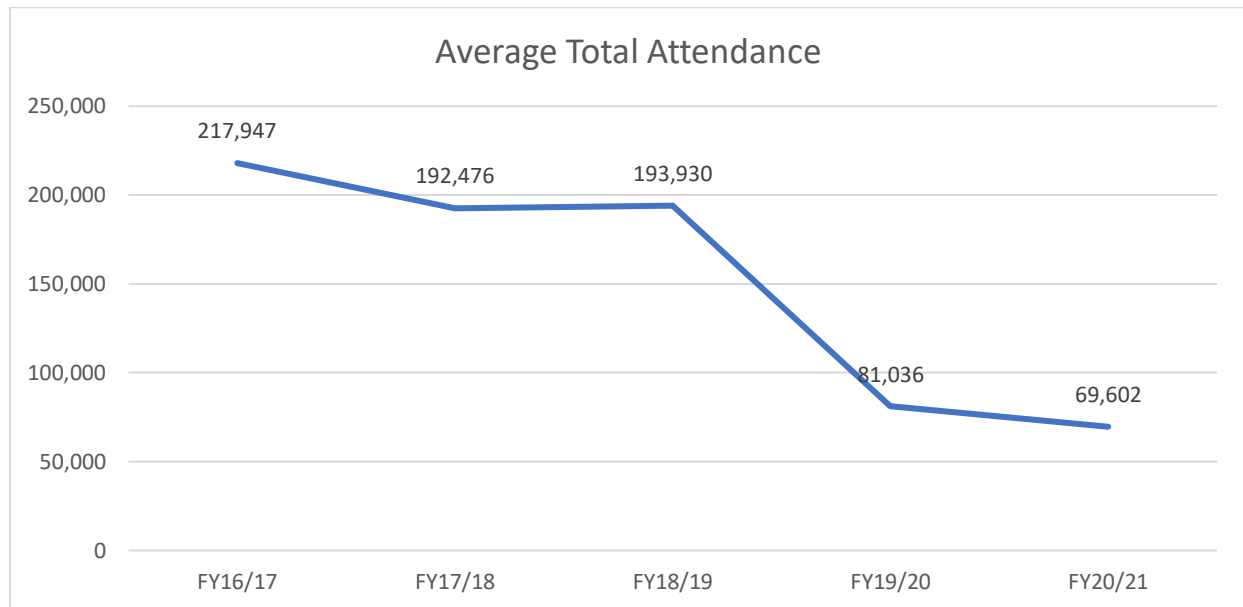
Unlike ILL, MelCat borrowing stayed steady and MelCat lending jumped up in FY19/20.



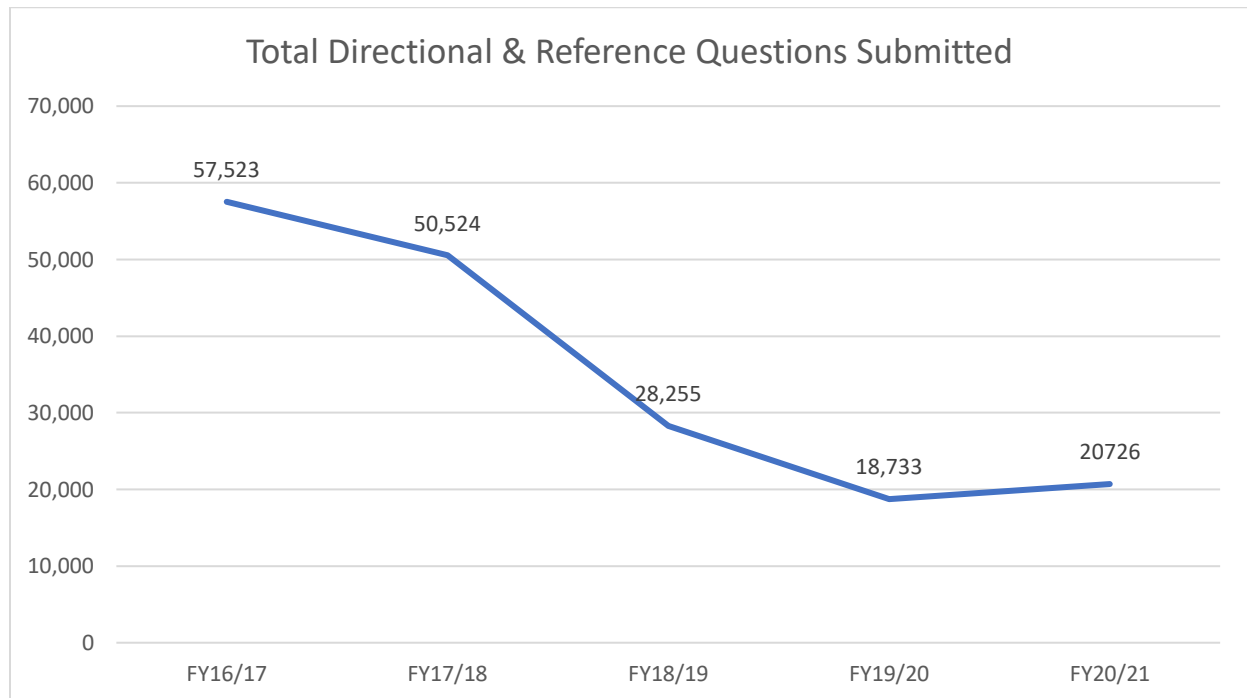
Average Registered Borrowers trended downward in FY19/20 and FY20/21. In FY20/21, there were about 9% fewer borrowers than in FY18/19.



FY20/21 saw five year lows for total library attendance and program attendance. FY20/21 total attendance was about 68% lower than the five-year high in FY16/17. FY20/21 program attendance was about 48% lower than the five-year high in FY16/17.



Directional and reference questions had been decreasing before the pandemic, with the most significant drop between FY17/18 and FY18/19. Numbers dropped further in FY19/20, and rebounded slightly in FY20/21.



## **Environmental Scan**

An environmental scan considers the broader context in which an organization exists and identifies key issues that potentially impact the future of the organization. To kick off the library's strategic planning process, elements of the environmental scan were identified through Board and staff sessions held in June 2022.

<b><u>Political</u></b>	<b><u>Economic</u></b>	<b><u>Social</u></b>
<ul style="list-style-type: none"><li>• Divisions in political views</li><li>• Lack of collaboration and civility</li><li>• Distrust in media and government institutions</li><li>• Misinformation</li><li>• Free speech</li><li>• Censorship (book bans)</li><li>• Rising city taxes</li><li>• Special-interest groups</li></ul>	<ul style="list-style-type: none"><li>• Rising gas prices</li><li>• Lack of affordable housing</li><li>• Inflation</li><li>• Threat of recession</li><li>• Economic disparity</li><li>• Climate change</li></ul>	<ul style="list-style-type: none"><li>• Social media</li><li>• Increased awareness of social justice movements</li><li>• Adjustments to pandemic norms at different rates</li><li>• Mental health</li><li>• Library's role in creating community</li><li>• Changing spending habits</li><li>• Community desire for recreational and cultural programs</li><li>• Homelessness</li><li>• Lack of socialization during pandemic</li><li>• Accessibility of virtual programming</li><li>• Expectation of immediate response</li></ul>
<b><u>Technological</u></b>	<b><u>Legal</u></b>	<b><u>Library Sector</u></b>
<ul style="list-style-type: none"><li>• Spread of misinformation and division</li><li>• Less in-person interaction</li><li>• Digital divide</li><li>• Increasing rate of technological change</li><li>• No breaks or boundaries</li><li>• Remote and hybrid teaching and work</li><li>• Virtual programming helped reach wider audience</li><li>• Social connection</li><li>• Lack of accessibility depending on age</li><li>• Instruction for patrons on new technology</li><li>• Increased anxiety</li><li>• Too many modes of communication</li><li>• Fear of print going away</li></ul>	<ul style="list-style-type: none"><li>• Privacy from government and technology</li><li>• Tax tribunals</li><li>• Township and city millages</li><li>• Copyright for digital items</li><li>• State-level advocating from MLA</li><li>• Book challenges</li><li>• Unique relationship to township advising</li><li>• Free speech</li><li>• Hate speech and harassment</li><li>• Townships not voting to extend library access</li></ul>	<ul style="list-style-type: none"><li>• Well-developed collection</li><li>• Fine free</li><li>• Cannabis tax revenue to go to libraries</li><li>• Staffing</li><li>• Book challenges</li><li>• Finances</li><li>• Millage renewals</li><li>• Balance between eResources and streaming with physical collections</li><li>• Staff not equipped for tax, social work, and job search tasks</li><li>• Increases in programming</li><li>• Meeting space</li></ul>



## **SOAR Analysis**

A SOAR analysis (strengths, opportunities, aspirations, and results) narrows the focus from an environmental scan to consider the organization specifically. This exercise helps identify potential directions to explore during the strategic planning process. SOAR elements were identified through Board and staff sessions held in June 2022 and are summarized below.

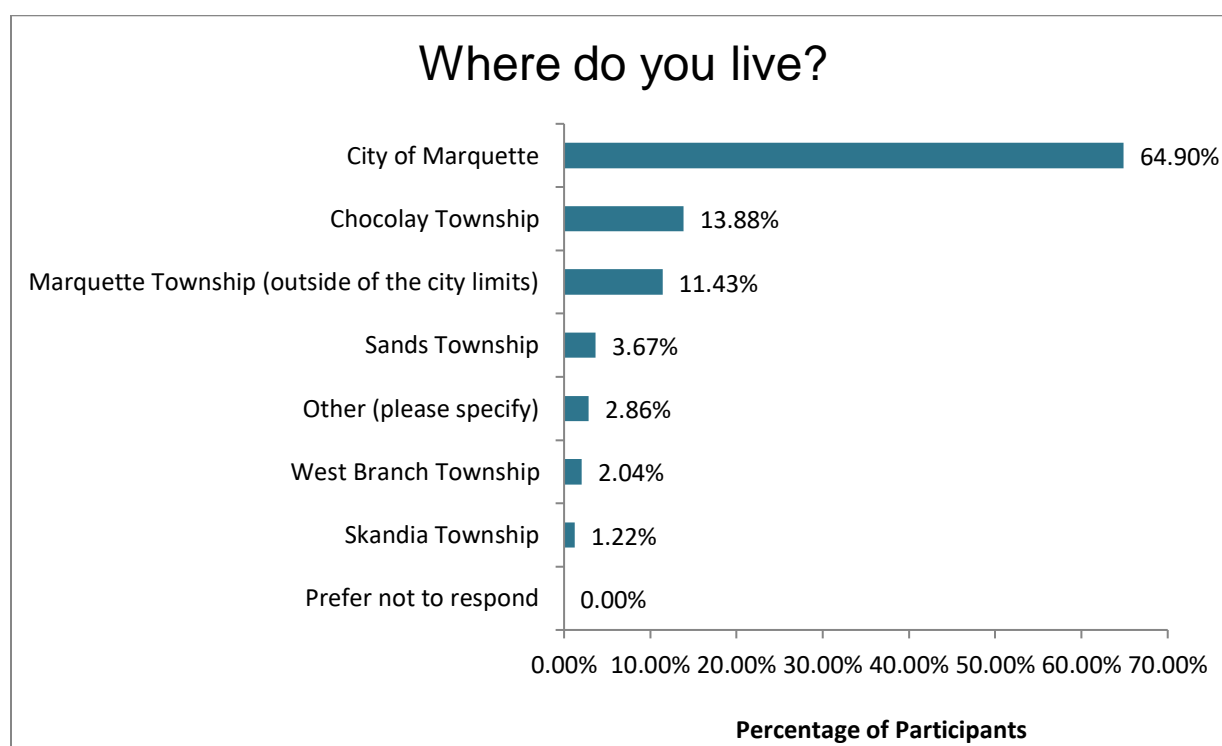
<b><u>Strengths</u></b>	<b><u>Opportunities</u></b>
<ul style="list-style-type: none"><li>• Telescopes</li><li>• Magazines</li><li>• Sound booth</li><li>• Children's room</li><li>• Creative programing</li><li>• Programs accessible remotely, streaming (YouTube)</li><li>• ILL, MELCat</li><li>• Helpful and Welcoming reference staff</li><li>• Local history section</li><li>• Activities, spaces, and materials for all ages</li><li>• Good relationships with the community and townships</li><li>• Beautiful facility and view</li><li>• Proactive leadership (i.e., Andrea brings things to the Board, helps the Board be consistent)</li><li>• Exhibits, art space, partnership with art council</li><li>• Communicative and effective Board</li><li>• Strong Township Advisory Council</li><li>• Friends group relations</li><li>• Relationship development between Director and the townships</li><li>• Collection – one of the largest in the UP</li><li>• Strong public support – donors, advocates, volunteers</li><li>• Credibility and government service</li><li>• Force for unity in community</li><li>• A lot of meeting rooms</li><li>• Computer and WiFi access</li></ul>	<ul style="list-style-type: none"><li>• Increasing awareness of MELCat, local history collection</li><li>• Developing unified community calendar</li><li>• Continually updating policies</li><li>• Communicating with the community</li><li>• Advocating with stakeholders to grow diverse funding options</li><li>• Enhancing adult technology education</li><li>• Partnering with schools</li><li>• Having Center for Lifelong Learning meetings at the library</li><li>• Increasing public History Center offerings</li><li>• Partnering with University library</li><li>• Cross-training staff</li><li>• Hosting continuing education opportunities</li><li>• Relationship building with Township Board</li><li>• Advocating for public support</li><li>• Healing from the pandemic and from social division</li><li>• Reach out more to townships</li><li>• Increasing accessibility, online resources and programs</li><li>• Increasing homeschooling, day programming for various ages</li><li>• Promoting databases, especially to teachers and university</li><li>• Promoting digital materials</li><li>• Adding clearer wayfinding</li><li>• Becoming fine free</li><li>• Hosting a community resource fair</li><li>• Being clear about limitations</li><li>• Building partnerships with NMU volunteers/tech help</li><li>• Partnering with social work intern from the university</li><li>• Utilizing new staff</li></ul>

<b><u>Aspirations</u></b>	<b><u>Results</u></b>
<ul style="list-style-type: none"> <li>• Connect with the community</li> <li>• Connect people with education, entertainment, and arts programs</li> <li>• Become a community gathering place</li> <li>• Increase library usage</li> <li>• Have a happy staff</li> <li>• Be well-resourced</li> <li>• Be a beautiful library with strong budget</li> <li>• Help patrons feel respected and safe</li> <li>• Promote a love of reading</li> <li>• Help patrons feel ownership about the library</li> <li>• Respond to the community</li> <li>• Be a trustworthy source of information</li> <li>• Encourage patrons recommend the library to others</li> <li>• Update perception of the library and its holdings</li> </ul>	<ul style="list-style-type: none"> <li>• Patrons like and value the library</li> <li>• Community trust</li> <li>• Patron needs met</li> <li>• Patrons in tune with community and world events</li> <li>• More donors and stronger budget</li> <li>• Strong voter support</li> <li>• Sense of ownership of the library by the community</li> <li>• Good word of mouth promotion</li> <li>• Good customer service</li> <li>• Staff retention</li> <li>• Community engagement and connection</li> <li>• Perception of the library as community cornerstone</li> <li>• Expanded view of what is available at the library</li> <li>• Welcoming space for everyone</li> <li>• Informed citizenry</li> <li>• Lifetime usage that starts with kids</li> </ul>

## Community Survey Summary

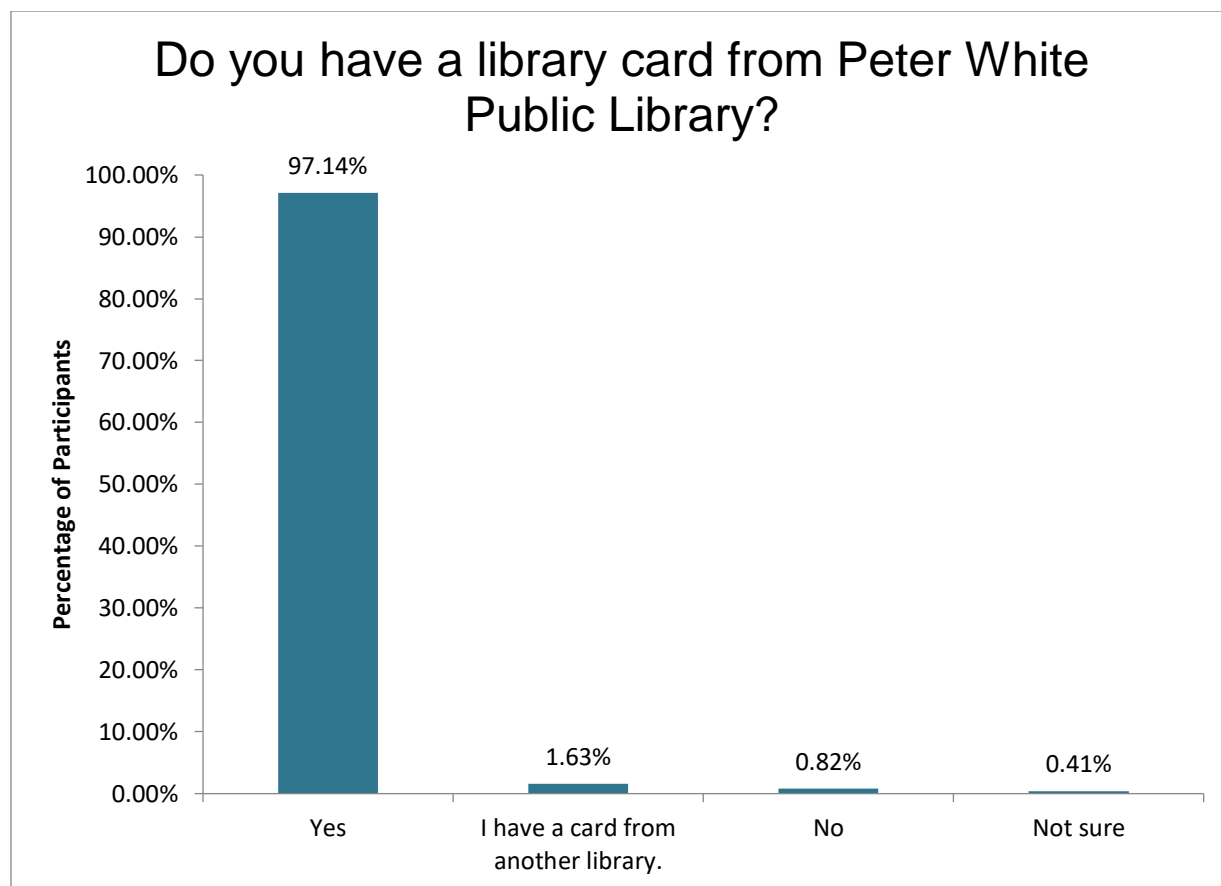
As part of their strategic planning process, Peter White Public Library conducted a community survey to learn more about their users: what they value about Peter White Public Library and the hopes they have for the future regarding the library. In total, 245 community members completed the survey.

The summary that follows contains both quantitative and qualitative data obtained from participants. Please note that, in some cases, the same or similar feedback was provided by several individuals. In other cases, feedback was less commonly provided but still thoughtfully offered; inclusion of such comments serves to highlight (without overemphasizing) voices in the minority to ensure such feedback is not overlooked. In all cases, the information is representative of ideas offered by community survey participants.



#### FINDINGS:

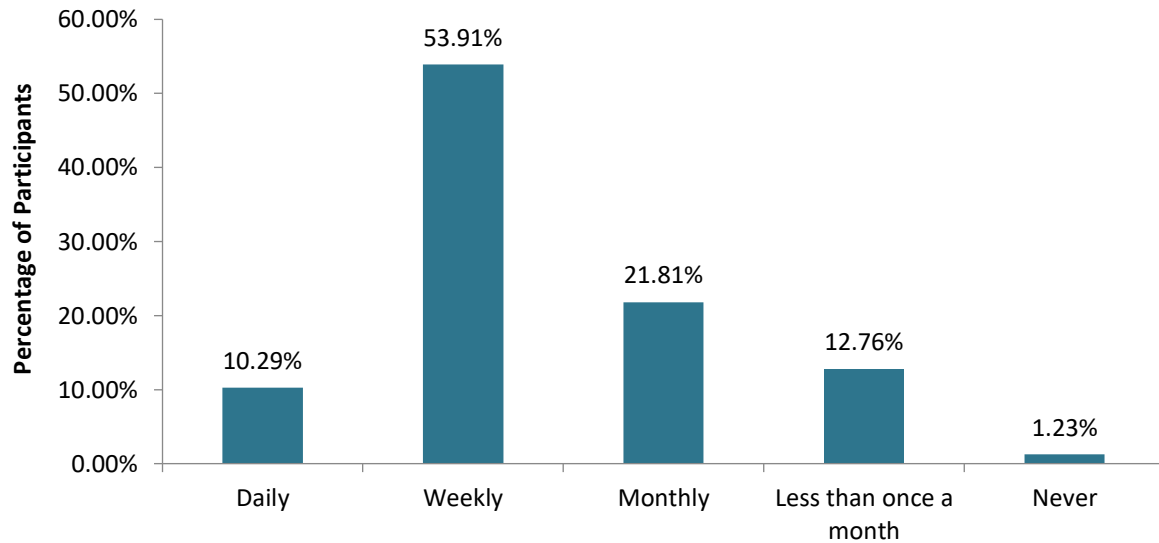
- Overall, 64.90% of participants live in the City of Marquette, with 13.88% residing in Chocolay Township, and 11.43% in Marquette Township. In total, residents from these locations make 90.21% of survey participants.
- Sands Township residents account for 3.67% of participants, while 2.86% of participants marked “other.” The locations listed by participants who marked “other” include Hancock, Ishpeming, Spurr Township, Forsyth, Mathias Township, and Illinois.



#### FINDINGS:

- Overall, 97.14% of participants have a library card from Peter White Public Library.
- The 1.63% of participants who have a card from another library indicated they are cardholders with Ishpeming, Forsyth, Cary, and NMU.
- Only 2 participants (0.82%) indicated they do not have a library card. Of those participants, one person's expired during COVID; the other indicated they work at a library and so have a card from that library.

How often do you use the library (including online resources like eBooks, Kanopy movie streaming, virtual programming, etc.) on average?



**FINDINGS:**

- The largest percentage of participants (53.91%) indicated they visit the library weekly, which was followed by participants who visit monthly (21.81%), and those who visit less than once a month (12.76%).
- A smaller percentage of participants visit daily (10.29%), and an even smaller percentage do not visit the library at all (1.23%).
- In total, 86.01% of participants' visits fall between "daily" and "monthly."

### If you don't use PWPL services often, what would motivate you to use PWPL more?

(Please note: Of 245 survey participants, 64 answered this question; the other 181 participants chose to skip this question.)

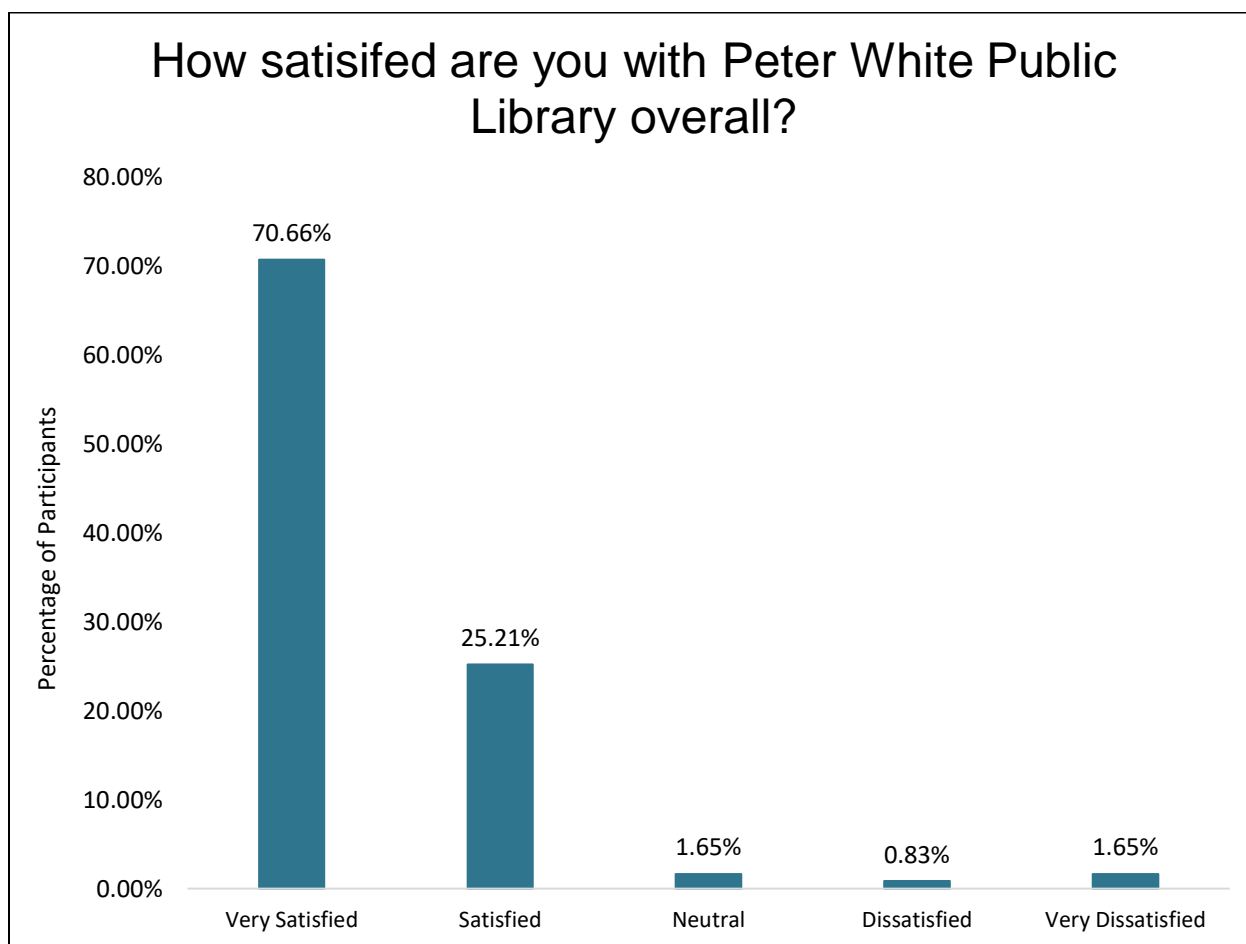
- Some participants would visit more frequently if they had **more free time**. Specific comments included:
  - "It's mostly a matter of personal habits and how busy I am. I always enjoy going to PWPL and I think the library is doing a great job."
  - "I love the library, I just have a pretty busy schedule during the school year (teacher). I love taking in the art and music when I'm able."
  - "If I was a better time manager, I'd be there more. I'm sure you have books about that I could check out..."
- Many participants would visit more frequently if **collections were expanded**. Specifically, participants expressed the following comments:
  - "New adult fiction books sooner."
  - "More current nonfiction books."
  - "Newer books (fiction & nonfiction) in the adult section."
  - "Better selection of new books, particularly less 'pop' books, and more books written for people with higher education and vocabulary."
  - "A more robust ebook collection would be great. I can rarely find any of the books I want in the Libby collection...it is very very poor."
- Some participants suggested **expanded programming**. Suggestions included:
  - "More activities for k-1 age group."
  - "[I w]ould love to see more events targeted towards young adults, concerts are great. Would love to see more local films."
  - "Adult book socials (55+)."
  - "Computer lessons [and h]elp downloading Kindle books."
  - "A Maker Space."
- Participants also suggested that the library **open on Sundays**. In particular, one participant commented, "I wish the library was open on Sundays, but also understand reasons why it would be closed (staffing, usage, etc.)."
- A few participants requested **safety improvements**. Specifically, participants expressed:
  - "[S]afety (often homeless people and others hanging around/in library)."
  - "If the library did more to promote masking to protect our community's vulnerable populations, particularly the elderly and young children (which seem to make up a substantial part of the library's most frequent patrons) my family would be able to participate in more library programming."
  - "Mandatory masking and/or curbside delivery."

## Does anything get in the way of you using PWPL?

(Please note: Of 245 survey participants, 118 answered this question; the other 127 participants chose to skip this question.)

- Many participants indicated they have **limited free time**. Specific comments included:
  - “If only I could find a way to fit more hours in the day, or maybe sleep less.”
  - “Work/homework time requirements.”
  - “Working, busyness.”
  - “We are required to trade hours of labor for money instead of reading all day.”
  - “Just my busy schedule.”
- Several participants indicated that the **reduced hours** of the library are problematic, with added Sunday hours being the most common request.
- Several participants indicated they **have trouble accessing materials** they want. Specifically, participants stated:
  - “When there is a long wait list for a book.”
  - “The books I want to listen to are not available on Libby.”
  - Some books aren’t available, even through [meLCat].”
  - “Wish there were more ebook titles available.”
  - “I do wish there was an app that I could look at checkouts & rentals on! I remember there used to be but then it stopped working.”
  - “I notice your cataloging services often places sci-fi into the general fiction category. This makes it harder to find the books I like.”
- A few participants indicated that **finer** get in the way of using PWPL. Comments included:
  - “We sometimes have overdue items and so sometimes I avoid taking items out because I worry that we won’t return them in a timely manner.”
  - “Fines on late materials when we’re not finished with them.”
  - “My attitude about being charged for a book that I returned via the book drop.”
- A few participants mentioned **COVID-19 and safety concerns**. Specifically, participants stated:
  - “We are unable to use the library when programming is primarily indoors, unmasked, and during periods of high covid transmission in our community.”
  - “The [p]andemic and those individuals who do not wear masks.”

- “I’m increasingly uncomfortable with the amount of homeless people. Please understand, I’m not judging, but I was attacked with attempted murder by a homeless person years ago only 15 miles from here.”
  - “[E]specially safety.”
- Many participants who responded to this question indicated that there was **nothing** getting in the way of them using Peter White Public Library.



<b>FINDINGS:</b>	<ul style="list-style-type: none"> <li>• A vast majority of survey participants (95.87%) are either “very satisfied” (70.66%) or “satisfied” (25.21%) with Peter White Public Library.</li> <li>• Overall, 6 of survey participants (2.48%) are “dissatisfied” or “very dissatisfied.”</li> </ul>
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**What do you like most about the library?** (Please note: Of 245 survey participants, 218 answered this question; the other 27 participants chose to skip this question.)

- Participants often **praised collections** offered by Peter White Public Library. In particular, participants expressed appreciation for **books and online resources**. Comments included:

- “The BOOK collection. Even though I realize that you have weeded the collection, I appreciate that it is still a robust collection of both older and new books for all levels--children through adults.”
- “Wide range of graphic novels.”
- “[I]n the past two years I’ve been most grateful for access to so much material.”
- “Love it all but especially appreciate the nonfiction section.”
- “The diversity of books and the simplicity of searching for them.”

“Access to books  
and online  
resources for  
reading.”

- Participants also praised **staff, who welcome and support visitors**. Specifically, participants shared:
  - “The helpful staff.”
  - “Knowledgeable, friendly people working there.”
  - “The Friendly [s]taff [and their] Attitudes...smiles and always there to help us [w]hen needed.”
  - “Staff is very helpful[.] For example, the staff helped me with applying for my passport renewal and will not just pass off requests.”
  - “Staff are SUPER.”
  - “Very efficient and great staff.”

- Participants delighted in the **youth services** provided at Peter White Public Library. Among many comments, participant expressed:

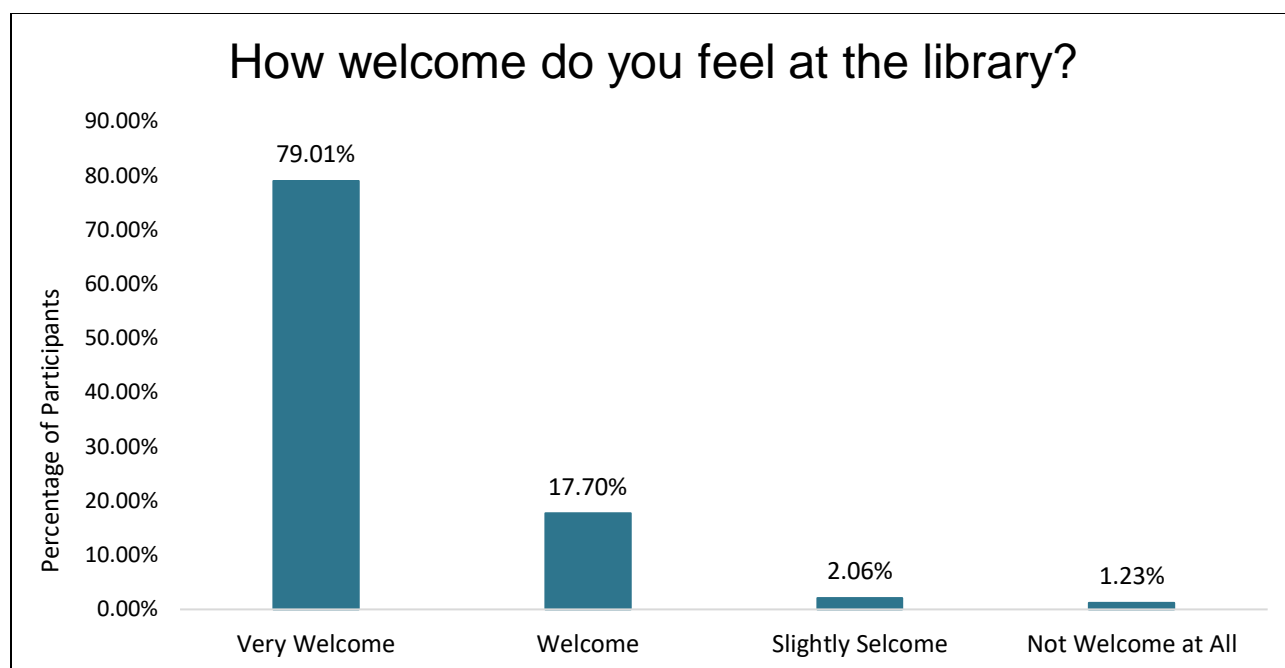
- “[T]he programming for kids and everything that is available for kids to do in the library--seriously, everything that is there is so amazing and it also changes so often. My kids LOVE to go there!”
- “The children's library.”
- “Great kids dept. and lots of kids activities.”
- “The welcoming atmosphere and the assistance I can get from the staff. Most my time is spent in the Children’s Area. That space and those librarians are incredible assets to our community. The energy they put into making the space welcoming for all children and the varied learning opportunities offered are so appreciated. We homeschool and the childrens [sic] area is a solid anchor in our daily rhythm. I also love the ownership and connection my kids feel there. The librarians know us by name, they know my kids’ interests, they ask for our input and feedback. I am grateful everyday [sic] to have our library!”

“Everything Youth  
Services puts on!”

**What do you like most about the library? (Continued)** (Please note: Of 245 survey participants, 218 answered this question; the other 27 participants chose to skip this question.)

- Participants celebrated the **programming** offered by Peter White Public Library. While some participants praised **children’s programming**, others praised the **family-friendly, teen, and adult programming**. In particular, one participant said that Peter White Public Library “is the heart of the community and serves all ages with a variety of materials and services.”
- Participants enjoy the **aesthetic and atmosphere** of Peter White Public Library. Comments included:
  - “The building is a gem...The Friends bookstore.”
  - Tough question. Everything is done so well. The general atmosphere is warm and professional. I always feel good when I step through the door. I love the Queen City Seed Bank.”
  - “Comfortable space.”
  - “The view from the second floor tables near the window.”
  - “The building is enjoyable to explore.”
  - “Art exhibits, meeting spaces.”
- Many participants’ comments included **multiple aspects** of Peter White Public Library as being most liked. Specifically, participants stated:
  - “Books. Books. Books. Programming. Children's Area. Events in auditorium. Proximity to AAC. Periodical reading room. Sunlit tables on second floor. Love our library[!]”
  - Love the multitude of offerings: Kanapy [sic], various events, Libby, conference rooms, rooms available for public use, exhibits, staff, BOOKS...children's section, use of the library steps...Cannot pin down one thing that I like the most.”
  - “See[ing] the art, com[ing] to events, us[ing] the computers, check[ing] out books.”
  - “What's not to like?! We always have books checked out. Read every day. That's our main use. But we just love the library itself. It's wonderful to go in, browse around, find a new author.... Love looking through the Friends' bookstore. OH - And the art galleries! We always check to see what's new on the walls when we visit.”
  - “I love the many public services PWPL provides as well as the space for art and community presentations/gatherings. Most of all, I appreciate the unfettered access to information, imagination, and quiet space.”
  - “PWPL builds community through lending books, promoting the arts, seed exchanges, movie shows. I like the learning and community building the best.”

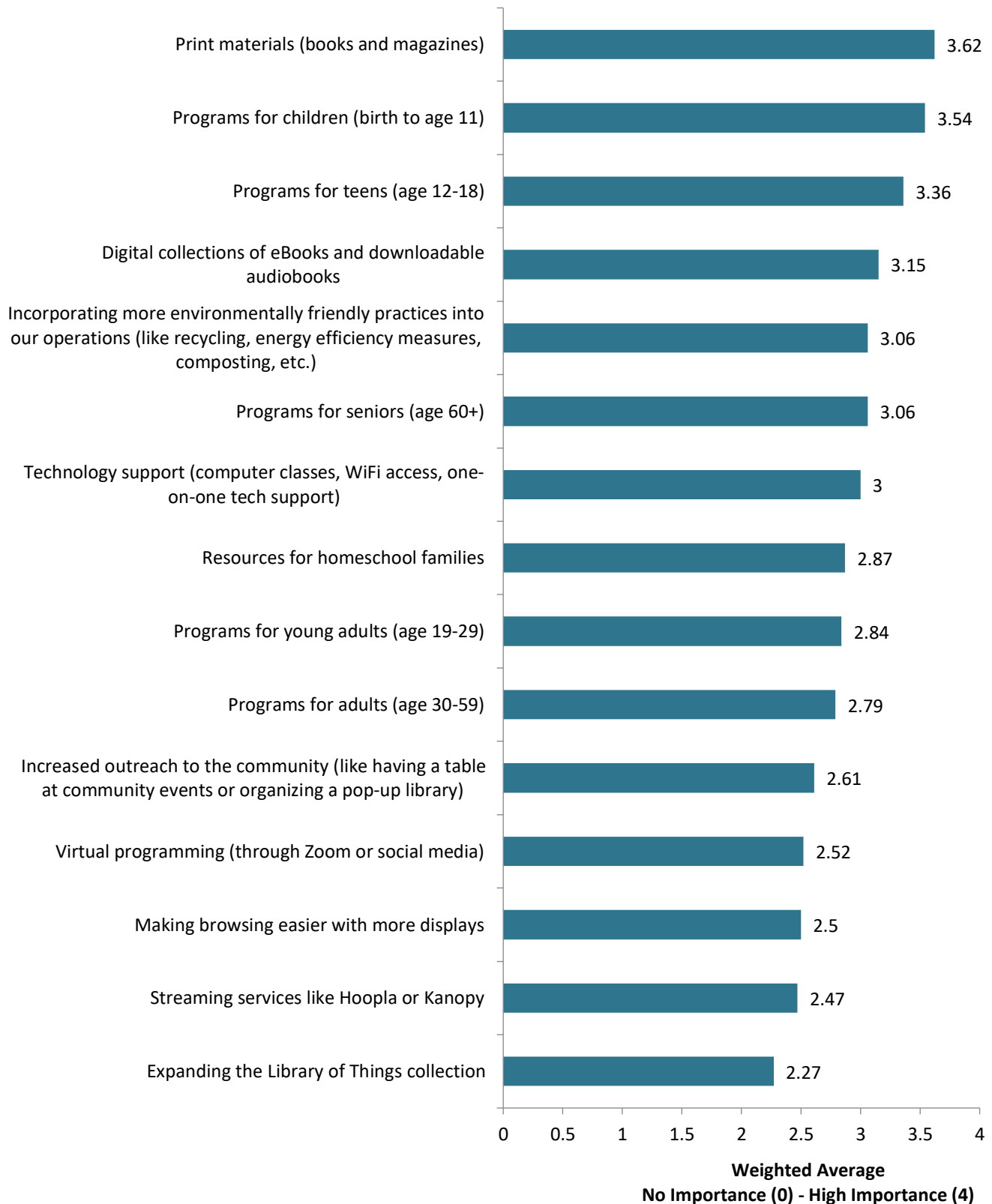
“I love everything!”



<b>FINDINGS:</b>	<ul style="list-style-type: none"> <li>A vast majority of survey participants (96.71%) feel “very welcome” (79.01%) or “welcome” (17.70%) at Peter White Public Library.</li> <li>Five survey participants (2.06%) indicated they feel “slightly welcome” and 3 participants (1.23%) indicated they feel “not welcome at all.”</li> </ul>
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What would make you feel more welcome?	
(Please note: Of 245 survey participants, 83 answered this question; the other 162 participants chose to skip this question.)	
<ul style="list-style-type: none"> <li>Some participants suggested a <b>café area</b> that sold refreshments, as they would like the opportunity to purchase and enjoy coffee, tea, and/or pastries while visiting.</li> </ul>	
<ul style="list-style-type: none"> <li>Some participants suggested having <b>friendlier staff</b>. Comments included:               <ul style="list-style-type: none"> <li>“If staff was friendly...they seem very cold and aloof”</li> <li>“[S]ometimes it seems like the employees are trying to ‘hide’ or not make eye contact so you won’t bother them.”</li> <li>“More friendly librarians.”</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>A few participants suggested <b>increased signage</b> and <b>book displays</b>, while another participant suggested a “more accessible map of library sections.”</li> </ul>	
<ul style="list-style-type: none"> <li>Many participants indicated they were <b>unsure</b> what could be done, and many others indicated there was <b>nothing to be done</b>. One participant stated “Just [k]eep doing what you are doing” while another stated “Impossible to do it better!”</li> </ul>	

Where should we focus resources over the next several years? Please rate the items below based on your opinion of their importance to the future of the library.

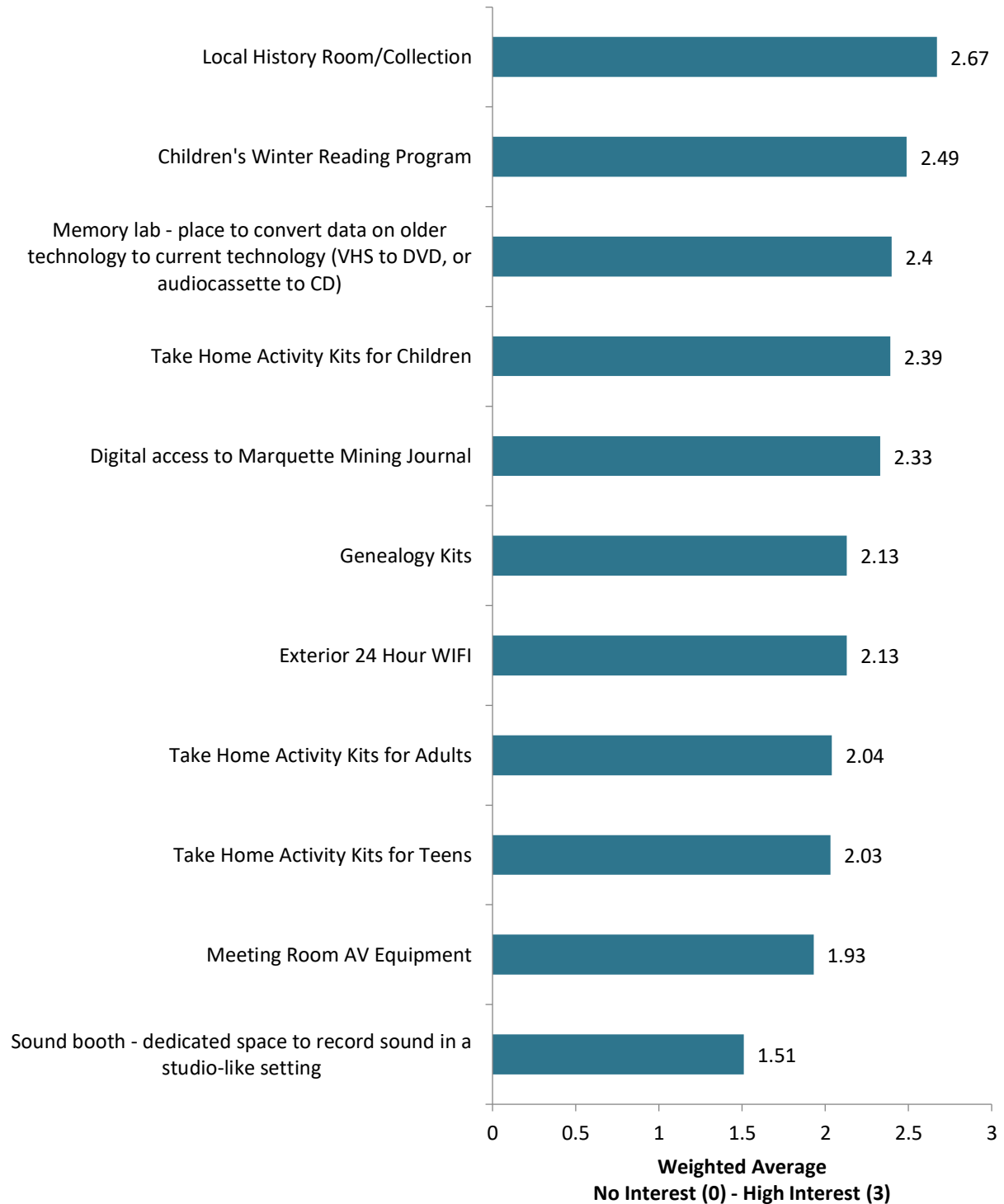


## FINDINGS:

- Of the top 4 items identified by participants as needing continued support, half were focused on collections: physical and digital books, audiobooks, and magazines.
- Of the top 4 items identified by participants as needing continued support, the other half were focused on programming: programs for teens and programs for children.



## Please rate your interest in the following new programs and services offered by the library.



## FINDINGS:

- Participants expressed the most interest in Peter White Public Library developing a local history room and/or collection.
- Creating a children's winter reading program ranked as second, while offering a way for participants to convert older technology to current mediums ranked as third.
- The fourth ranked item was "creating take home activities kits for children." This preference, when combined with the second-ranked winter reading program for children, means that children's programming accounts for half of the top four preferences expressed by participants.





**What programs or services would you like to see the library offer in the future?  
(Representative comments.)**

(Please note: Of 245 survey participants, 95 answered this question; the other 150 participants chose to skip this question.)

"More audiobooks on Libby!"

"More books. I've been getting increasingly frustrated by not being able to find the books I'm interested in."

"The more programs and services for children the better. As a young parent I never realized the importance of the library until [I] brought my children there."

"More varied art/activity classes."

"Language learning services (Finnish, Spanish, etc[.])."

"I'd love to know more about the Library of Things. Maybe programming on simple household repairs, "life hacks", or other sorts of hand-on workshops."

"More adult programs for the 30-60ish range. There is a ton for kids and usually quite a bit for seniors but general adults not so much."

"I would like to see a cafe space that could serve coffee and allow for meeting space and collaboration with wifi."

"More tween & teen programming. Perhaps outreach to schools."

"My favorite thing about the library is having access to new, good books (physical book), so I'd be happy for continued investment in those. Also, I'm hoping to write a fiction novel and might be interested in joining a writer's group if there was one."

"Continuing to offer some remote options amid the ongoing pandemic would be great."

"Ability to pay fines, etc[.] on line thru [sic] your website or other on line [sic] method."

"Just focus on improving current services"

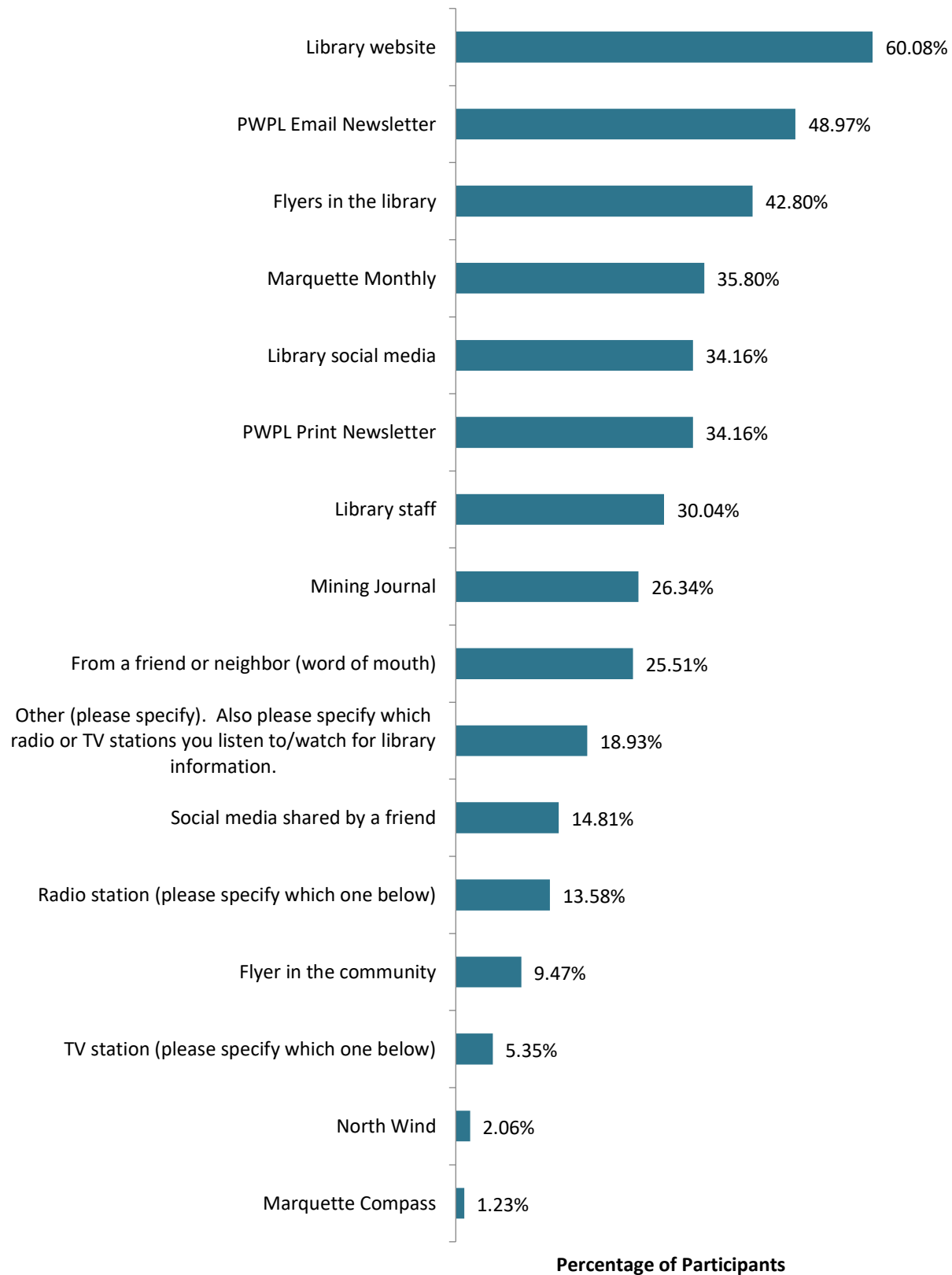
"Book fairs for all ages  
(including adults),  
maybe book signings,  
more concerts and  
local film showings."

"We love seeing all the  
varied activities for  
elementary aged kids!"

"MORE CONCERTS  
AND MOVIES."



## How do you find out about services and events at the library? (Check all that apply.)



## FINDINGS:

- Many participants have multiple ways they find out about library services and events. While there were 245 participants who completed the survey overall, this question received 980 responses; this is an average response rate of 4 per person for methods of receiving information about Peter White Public Library.
- When asked about receiving information via television and radio, the vast majority of survey participants cited TV6 and WNMU 90.1, though a few cited Q107.7.
- When asked about other sources from which they receive information, survey participants most commonly cited Facebook, *Marquette Monthly*, and social media generally.



### What community needs are you aware of? (Representative comments.)

(Please note: Of 245 survey participants, 117 answered this question; the other 128 participants chose to skip this question.)

"Affordable housing, affordable childcare, accessible healthcare."

"Climate change education, environmental teaching and activities."

"[A]ffordable housing and childcare (also, state and nationwide--access to diverse texts)."

"I think there are a lot of people who can't get or afford wifi[,] don't know how to use all their device's abilities, don't know how to search for specific information[,] or judge sources."

"[A]ffordable housing, environmental preservation, green spaces and art spaces."

"Lifetime learning opportunities...community education."

"Kids need mentors, especially if there is a parent missing. Many elderly seniors find online information difficult or impossible. They still need the hard copy or at least one-on-one help if online is the only way for something."

"We definitely need more inclusionary spaces. Focus on celebrating culture and diversity outside of the hyper local focus of the UP. Our kiddos need more experience with the world nationally and internationally. They need more enrichment and intellectual stimulation than they are finding here in the UP."

"Support for parents, social emotional learning for families."

"The community needs things to do for kids especially in the winter."

"Daycare shortage, rising cost of living expenses, community connectedness."

"Children and families needing support, i.e. to increase reading skills. I am impressed that you have teen groups organized as well as all ages from birth to adult, i.e. trans gender [sic], etc. I suspect many parents could use coping skills, dealing with their children."

"Homelessness, food insecurity, lack of resources (internet, mental health)."

"Affordable housing, inflation, low wages, racism."

"Homelessness, drugs, hunger, affordable housing, keeping doctors practicing here, suicide."

## How can the library help meet community needs?

(Please note: Of 245 survey participants, 99 answered this question; the other 146 participants chose to skip this question.)

- Some participants suggested **more programs**. Suggestions included:
  - a health fair
  - information on what stymies affordable housing
  - workshops to help community members develop skills
  - tech help
  - hosting “round table” discussions
  - education about climate change
- Some participants emphasized the important of **providing meeting spaces** and **collaborating with community partners**. Specifically, the following comments were shared:
  - “Providing community spaces for groups to gather to discuss solutions”
  - “Availability for space, networking with community leaders and resources.”
  - “I think serving as an accommodating gathering space for community events and discussion is vital. Especially the discussion part.”
  - “Collaborate with school systems.”
  - “Work...with community groups to organize forums, book displays, etc[.] on vital topics like mental health, affordable housing, demographic trends, etc.”
  - “Classes with childcare available for those who need it and or take home kits. Involve MAPS teachers and counselors.”
  - “In a perfect world, the library could have a full time social worker that could support patrons and also offer programming, groups, materials to bring home based on topics of interest, etc.”
- Some participants emphasized the importance of **access to information**. Participants stated:
  - “Print and online resources...fighting book banning.”
  - “Brainstorming: a local services /resource table, housing listings, education/tutorials/presentations on how to buy property or a house/how to build on it.”
  - “Keep providing access.”
  - “Provide a safe, comfortable space with access to books of all genres.”
  - “[B]ooks focused on the issues.”
- Many participants indicated they were **unsure** what could be done, and several others indicated Peter White Public Library has a **demonstrated history of working hard to meet community needs**. One participant shared, “I think the library is already meeting these needs, however not everyone may know about the availability.” Another participant stated: “I am overwhelmed by your accomplishments but if I think of anything new, I will definitely share it with you.”

## What activities and hobbies to you hope to spend more time on in the next year?

(Please note: Of 245 survey participants, 150 answered this question; the other 95 participants chose to skip this question.)

- Many participants expressed interest in **learning about and spending more time outdoors**. Specifically, survey participants mentioned:

- |                    |                         |
|--------------------|-------------------------|
| ○ Gardening        | ○ Homesteading          |
| ○ Fishing          | ○ Landscape photography |
| ○ Natural building | ○ Water conservation    |
| ○ Native plants    | ○ Bicycling             |
| ○ Yard maintenance | ○ Snowshoeing           |
| ○ Hiking           | ○ Foraging              |
| ○ Kayaking         | ○ Traveling             |
| ○ Camping          | ○ Cross country skiing  |
| ○ Stargazing       | ○ Bird watching         |

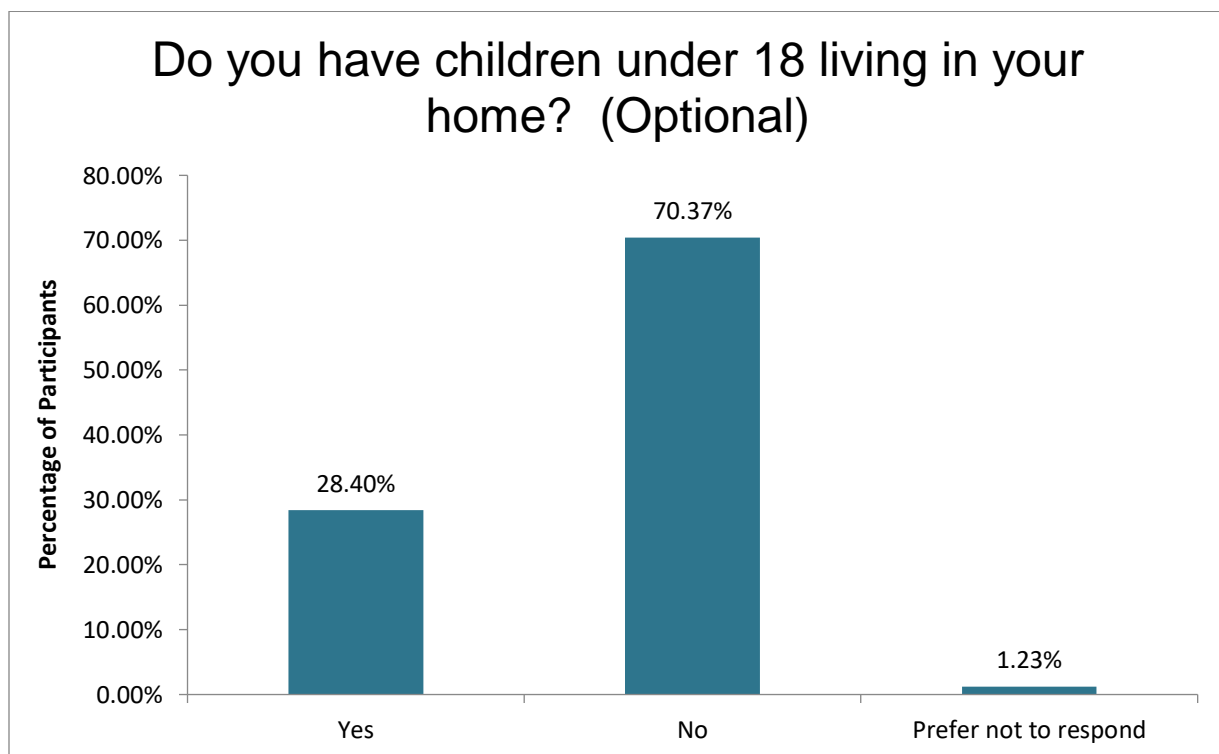
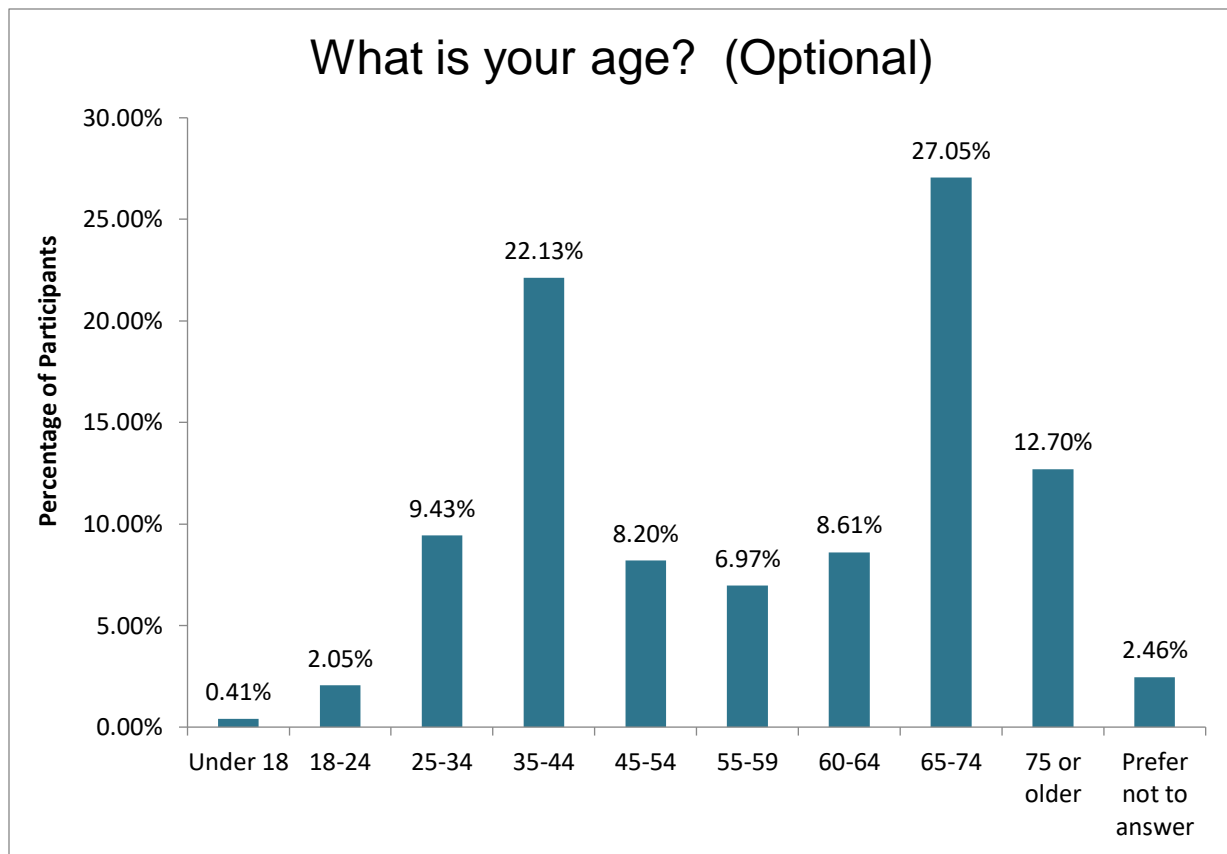
- Many participants expressed interest in **arts and crafts**. Survey participants mentioned:

- |                  |                        |
|------------------|------------------------|
| ○ Sewing         | ○ Photography          |
| ○ Knitting       | ○ Scrapbooking         |
| ○ Quilting       | ○ Painting             |
| ○ Reupholstering | ○ Drawing              |
| ○ Art classes    | ○ Woodturning          |
| ○ Print making   | ○ Pottery              |
| ○ Paper collage  | ○ Spinning and felting |

- Many participants expressed interest in **learning** about varied topics. Survey participants mentioned:

- |                             |                                      |
|-----------------------------|--------------------------------------|
| ○ Digitizing family records | ○ Playing the piano                  |
| ○ Anishinabe language       | ○ Natural history of the area        |
| ○ Playing the violin        | ○ Genealogy                          |
| ○ Yoga                      | ○ United States history              |
| ○ Sustainable living        | ○ Computer software and social media |
| ○ Decluttering              | ○ Music from 1950-present            |

- Many participants are interested in **reading more**. One participant shared, “[I’m] working my way through a short list of movies and a LONG list of books.” Another participant stated that they want to “[i]ncrease the scope of my non-fiction readings which are critically acclaimed.” A third participant has a goal to “[r]ead *War and Peace*.”



<p><b>OVERALL COMMUNITY SURVEY FINDINGS:</b></p>	<ul style="list-style-type: none"> <li>• Peter White Public Library has strong support from survey participants, with the vast majority (95.87%) indicating they are either “very satisfied” (70.66%) or “satisfied” (25.21%) with the library overall.</li> <li>• Participants enjoy the many services and resources provided by Peter White Public Library, and they particularly appreciate the library’s collections, staff, youth services, and programming.</li> <li>• Many participants have several ways they learn about events and services provided by the library, with the average number of information sources coming in at a rate of 4 per person.</li> <li>• Participants desire continued financial support of Peter White Public Library’s collections and programs. Support is strong for physical and digital books, audiobooks, and magazines, and programming for teens and children.</li> <li>• In terms of new initiatives, survey participants expressed interest in a local history room and/or collection, followed by a children’s winter reading program, providing ways to convert data on older technology to current mediums, and creating take home activity kits for children.</li> </ul>
<p><b>POSSIBLE CONSIDERATIONS:</b></p>	<ul style="list-style-type: none"> <li>• Peter White Public Library may benefit from providing more information to community members through existing channels and through increased partnership with local organizations and agencies.</li> <li>• Given the supportive comments and requests for enhancements, Peter White Public Library may benefit from sharing further plans for continued collections and program development.</li> <li>• With 86.01% of participants’ library use falling between “daily” and “monthly,” increases and/or adjustments to services and programs will likely benefit from thoughtful timing and a metered approach.</li> <li>• Given the range of community needs expressed by participants, Peter White Public Library may benefit from considering which needs are top priorities for the library, followed by determining those can be addressed primarily with collections versus those that can be addressed primarily with programs.</li> </ul>

	<ul style="list-style-type: none"><li>• Given the exceptionally strong support of Peter White Public Library by survey participants, Peter White Public Library may benefit from considering how current supporters can help grow awareness and support among members of the larger community.</li></ul>
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## Focus Group Summary

During the week of June 13, 2022, Peter White Public Library held community focus groups with 25 participants. Discussions centered around aspirations participants had for the library and community and how to achieve those aspirations with support from the library. They also discussed how the library can reach more people and partner with more community groups.

To start the conversation, participants listed words and phrases to describe the community:

- County seat
- Hub
- College town
- Access
- Walkability
- Outdoorsy
- Committed to the area
- Friendly
- Helpful
- Active
- Growing
- Changing
- Cultural and educational opportunities

When asked about their aspirations for the community, participants' responses fell into the following themes: Uniting the community; creating a vibrant and welcoming community; and supporting families. Participants hope that commonality can be found among community members and that people can come together to find solutions to the community's challenges. One person said there needs to be a community-wide to-do list. A supportive community for families would have free indoor spaces to bring kids, childcare resources, programming for young families, and a more accessible library space. To create a vibrant and welcoming community, participants envision a community that retains young professionals and entrepreneurs, offers recreational and professional opportunities every day of the week, and is intentional about sustaining its culture.



Lack of affordable housing and high cost of living were the most emphasized challenges to reaching the community's aspirations. Participants also noted lack of healthcare, low wages, job commutes, and changing attachments to community as more obstacles. One participant said that community members are adjusting to a lot of change. Another person said community members are not providing constructive feedback at community meetings. This all slows the community's progress towards uniting the community, supporting families, and developing a vibrant and welcoming community.

Despite these challenges and obstacles, participants see a variety of ways the community can change to reach its aspirations. The community would benefit from more childcare options, cultural activities like "concerts in the park," coordinated community events, and public-private partnerships. The library's accessible and central location makes it ripe for bringing together the

community. Participants suggested that the library develop strong partnerships (e.g., MARESA and NMU) and coordinate the community calendar. Having a strong social media presence and cross-promoting with partners would build awareness around the many services the library offers. Technology access, technology support, career and job search assistance, makerspaces, and self-directed learning opportunities are all ways the library can empower the community to enact change. Participants would also like the library to add Sunday hours, continue storytimes, offer personal appointments with librarians, and require staff to walk the library rather than sit behind a desk.

Focus group participants most value the library's welcoming and inclusive space; excellent staff; local history collection; teen room and council; and accessible materials, books and beyond. For future programming, participants would like to see music programs, economy lectures, Lunch & Learns, book discussions, Movie & Dinners, programming related to topics on NPR, and even after-hours events.

To reach more people in the community, participants think the library can diversify marketing avenues; leverage Board, staff, and patron networks; and create fun and impact ways for people to engage with the library. In its messaging, the library should spread awareness of how the library system is funded, how people can support the library (donations, fall match, Wish Lists, advocacy, Board positions, etc.), and what the library offers the community beyond books. This messaging should be broadcast through traditional and social media, print and digital newsletters, and word of mouth via Board members, staff, and patrons. A comprehensive communication strategy would consider that different audiences receive information in different ways. One participant encouraged the library to target certain groups and consider the return on investment for outreach funds. In addition to media-based marketing, staff can stand on the front lawn to welcome people inside the library. The library could create an outreach committee of patrons. Patrons could be incentivized to bring a friend to programming or challenge a friend with a summer reading goal. Creating contests and scavenger hunts would be fun ways for people to learn about the library. Increasing Board diversity would also help bring new perspectives and networks to the library. Priorities for marketing should include younger audiences and audiences outside the city. There should be a plan for donor development and legacy.

Partnerships can help the library better serve the community. Participants suggest the library partner more with the local history museum, Great Start Collaborative, Connect Marquette, and NMIE. One participant suggested that the library look at the list of organizations using the meeting rooms and reach out to them as potential partners. Another complimented the library on their strong arts partnerships. Participants said that partnerships could help the library make more use of the library's art and community rooms.



When offered the chance to add additional thoughts, participants responded with ideas about accessibility, awareness, programming, community connections, and user experience. Participants suggested the library increase accessibility by lowering the non-resident fee, opening at 9am, opening and closing on the hour instead of the half-hour, opening on Sundays, and making sure people don't feel rushed out at closing. Regarding awareness, participants encourage the library to reach younger people without kids, promote library activities at checkout, leverage the power of word-of-mouth marketing, and consider what kind of programming would appeal to broader audiences. To attract more people to programming, participants suggest regular and early indoor storytimes, intergenerational reading and play events with retirees and kids, and open houses for the teen room (with teen hosts), history room, and the library as a whole (for new members, especially). One participant said the library should keep the programming consistent so people know when to expect programs. In addition to programming to build community and connections, participants want the library to intentionally encourage community interaction and work with community partners to address community needs. A couple participants emphasized building partnerships especially with childcare providers. One participant mentioned that MARESA used to have playgroups and wanted those to return. Other things participants want the library to keep in mind surround patron mindset and experience. Patrons' lives have changed significantly, many people are working remotely and there is an expectation for 24/7 and immediate access to resources. Despite the many suggestions for improvements, participants also celebrated how the library helps people learn and sparks ideas. "The staff is great, so helpful," one person said. Other participants said they think the homeschool support is good, and they love the book bags.

## Board/TAC and Staff Survey Summary

For the Learning Report, we conducted a survey of Board members, Township Advisory Committee members, and staff members to provide an opportunity for initial input into the process beyond the environmental scan and SOAR analysis. Seven board members and 26 staff members participated. Below is a summary of their responses for each question.

### What is your favorite thing about working at the library or serving on the Board?

#### *Staff:*

- Helping the community
- Working with dedicated and kind coworkers
- Building relationships with patrons
- Facilities: Great atmosphere; beautiful building; perfect location
- Helping patrons find inspiring materials
- Supporting people's love of reading
- Mending damaged books
- Seeing patrons' enjoy the library
- Telling people about what's happening at the library
- Striving to support everyone in the community
- Cultivating a sense of community
- Providing programming that parents and kids love
- Promoting equal access to information
- Maintaining an orderly work environment

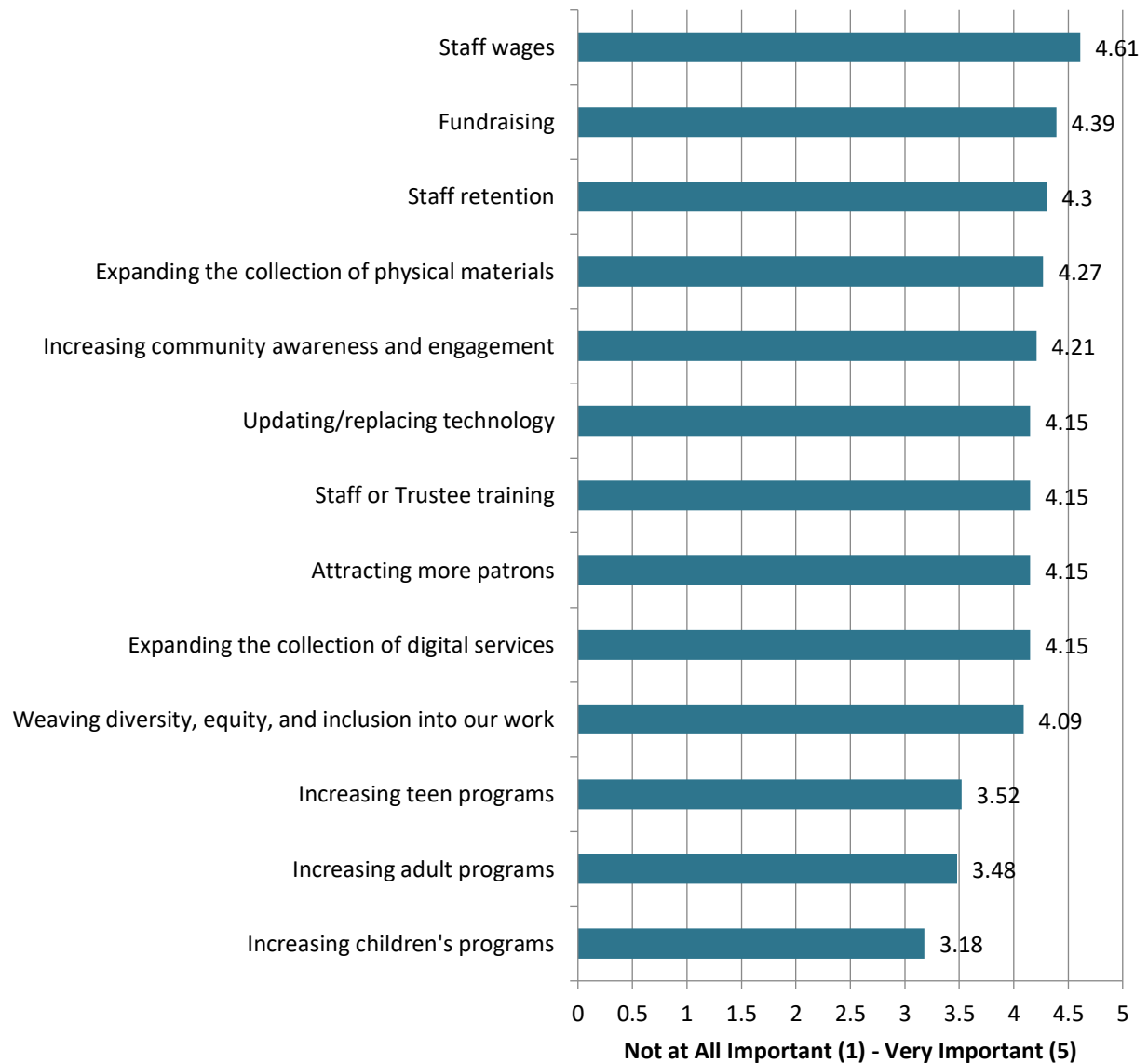
#### *Board/TAC:*

- Learning about the inner workings of the library
- Working with the staff
- Helping the community
- Working with people who have diverse viewpoints

### What's working well at the library? What are we good at?

- Customer service and engaging with the public
- Being a cultural center
- Providing a welcoming and pleasant library space
- Making technology and books accessible
- Programming for all ages
- Providing arts programming in the community
- Problem solving to help patrons
- Adapting to meet patron needs
- Maintaining an organized environment
- Building relationships, especially with families
- Maintaining large and relevant collections
- Cultivating a strong social media presence
- Offering special features like local history room, sound booth/memory lab
- Approaching policy development thoughtfully

## When you consider the library's future, how important are each of the following items?



### FINDINGS:

- Staff wages; fundraising; and staff retention ranked as the top three most important items for the library's future.
- The lowest ranked items were increasing teen programs; increasing adult programs; and increasing children's programs.

Please share some ideas you have for how the library can work towards, implement, or expand the items that you indicated are important or very important in the list above.

- Fundraising: More appeals to donors, grant applications, and continuation of current effective practices like book sale, etc.
- Raise wages to reflect cost of living in the area
- Restart quarter sheet reminder for programs
- Keep staff aware of events at the library
- Increase community engagement
- Offer classes on life skills like finances and technology
- Encourage more staff training and continuing education, particularly DEI training on inclusive language, microaggressions, and welcoming cultures
- Attract more diverse patrons
- Gather patron feedback regularly
- Increase advertising and diversify advertising pathways
- Ensure collections and technology are current and relevant
- Provide more money and hours for part-time positions
- Invite more BIPOC, LGBTQA+, and low-income speakers, writers, authors and activists to the library for programming and order accompanying materials
- Cross-train staff (this can pose a union issue but even just a quick tutorial as to how other departments function would be great)
- Develop a standard employee training manual
- Add to library of things
- Attend more local events
- Order more types of fiction
- Message to public about need for funding
- Boost New Fiction collection

What keeps you from enjoying your work at the library as a library staff/Board member more fully?

*Staff:*

- Inequity in resource distribution across departments
- More physical space in the library
- Less pressure to think of new programming
- Being underutilized
- Lack of interdepartmental communications
- Particularly prickly patrons
- Disorganized website
- COVID
- Slow days with few patrons
- Staff discussing politics
- Low wages and lack of benefits
- Too few hours in the day to get everything done
- Lack of collaboration by some staff
- Understaffing
- Nothing

*Board/TAC:*

- Developing committees to do more work
- Nothing

How could the library help you better perform/succeed in your role at the library? What do you need to be a better Board/Staff member?

*Staff:*

- Learning about the roles in different departments
- Cross training
- Trust
- Required continuing education and training
- More staff cohesion
- Updated website with more information and easier navigation
- Higher wages and yearly raises
- Training on serving populations with health and mental health challenges
- Management training
- More funding
- Sufficient staff levels
- More schedule flexibility

*Board/TAC:*

- Learning more about roles and responsibilities
- Summarized financial reports with highlighted key indicators

What community needs are you aware of? What could the library do to address these needs?

- Meeting spaces
- Career placement programming
- Library can connect tenants with affordable housing
- Beginner technology classes
- Outreach to grades 5-12, specifically to support youth mental health
- Adult education opportunities and GED classes
- Community art classes for teens and adults
- Forums about lack of housing and childcare
- Outdoor patio that can be reserved by patrons
- Trainings for digital services like Libby and Melcat
- Private space for visitations
- Better promotion of library offerings
- Returning to pre-pandemic activities
- Ensure policies protect against book ban attempts
- Outreach to communities that don't access the library a lot
- Bookmobile or delivery service
- Facilitate community discussions about divisive issues

Assume for a moment that money and time were no object and you could change one thing at the library to improve things, what would that be?

- Increased staff wages
- Longer hours of operation
- More parking
- Food court on the roof of the library
- More adult graphic novels
- Having all materials desired by patrons
- Hosting big name authors and speakers
- Departments on one floor
- Increased staffing
- Rebuilding circulation and work desks for increased accessibility and visibility
- Windows in the staff lounge
- Expanded shelving to decrease need for weeding
- Additional meeting spaces
- Café
- Expanding new release movie section
- No longer using top shelves in Nonfiction section
- Health benefits for everyone
- Expanded outreach
- More physical space



## Community Organizations Strategy Review

Peter White Public Library serves the City of Marquette and its surrounding areas, including Chocolay Township, Marquette Township, Sands Township, Skandia Township, and West Branch Township. Organizations in these regions provide ample opportunities for partnerships which would allow the library to contribute its spaces, expertise, and position within the community to serve the information needs and strengthen the community health of Marquette and the surrounding townships.

One avenue for partnership is with Marquette Area Public Schools, who have stated as a goal in their 2022 strategic plan that they wish to improve their communications with other community organizations through “attending and presenting to local groups that can share and invest in [their] successes.” Strengthening the relationship between the library and school district would help the library stay informed of the needs of younger readers and the support they could provide to teachers.

According to the Upper Peninsula Community Health Needs Assessment 2018, the area has high rates of seniors. In addition to the books by mail program that is already offered by the library to patrons who are unable to reach the library in person, the library is well-suited to distribute information to seniors which addresses their health needs. Other health needs that have been identified that the library can assist in informing the community about are information about access to health insurance and information regarding the harms of vaping among teens.

One initiative outlined in the City of Marquette’s 2021-2023 strategic plan is the undertaking of an Arts and Culture Economic Impact Study in order to nurture and foster the creative economy of the area. It could be useful for the library to use the information they find in this study to promote artistic initiatives and support local artists and creatives, especially in how they can use this study to make a case for the arts.

### Sources:

- [Marquette Area Public Schools Strategic Plan 2022-2025](#)
- [Marquette Strategic Plan 2021-2023](#)
- [Marquette County Community Health Needs Assessment](#)
- [Upper Peninsula Community Health Needs Assessment 2018](#)
- [Peter White Public Library](#)
- [United Way of Marquette County](#)

## Appendix: Community Data

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Population	326,569,308	9,973,907	5,925	5,912	20,631	21,247	3,907	3,783	2,428	2,480	891	900	1,477	1,742
Median Age	38.2	39.8	44.0	42.6	28.6	31.7	47.4	44.8	41.3	40.5	53.4	43.0	39.4	29.6
Median Household Income (in \$)	64,994	59,234	69,651	64,043	42,746	36,797	64,700	58,750	68,571	69,783	56,071	42,679	51,394	31,736
Homeownership	64.4%	71.7%	89.0%	89.6%	47.3%	53.2%	65.7%	64.6%	91.9%	91.3%	91.5%	94.2%	50.4%	49.4%
Housing Value (Owner-occupied, in \$)	229,800	162,600	177,500	171,000	180,100	160,800	196,500	161,300	194,900	164,100	147,300	114,500	183,300	123,900
Below Poverty Level*	12.8%	13.7%	8.9%	6.1%	26%	25.9%	5.5%	11.8%	12.8%	12.2%	8.5%	13.4%	20.4%	31.2%
Average Household Size	2.6	2.45	2.39	2.75	2.14	2.22	2.31	2.38	2.79	2.70	2.36	2.61	2.43	2.77
Average Family Size	3.21	3.05	2.72	3.19	2.64	2.92	3.12	2.94	3.29	2.92	2.86	3.07	3.07	3.45

Sources:

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [DP04](#), [S0101](#), [S1701](#), [S1101](#), [S1901](#)

ACS 2010 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [DP04](#), [S0101](#), [S1101](#), [S1901](#)

\*Comparisons data for Below Poverty Level taken from 2012 [S1701](#)

## Age Distributions

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Total population	326,569,308	9,973,907	5,925	5,912	20,631	21,247	3,907	3,783	2,428	2,480	891	900	1,477	1,742
Under 5 years	6.0%	5.7%	4.4%	5.5%	2.9%	3.2%	5.3%	4.4%	7.5%	5.5%	2.7%	4.2%	7.2%	6.0%
5 to 9 years	6.1%	5.9%	4.4%	6.0%	3%	3.3%	6.2%	4.2%	8.1%	8.3%	4.6%	5.1%	4.3%	7.2%
10 to 14 years	6.5%	6.2%	5.7%	6.6%	3%	4.5%	4%	6.4%	7.7%	8.0%	8.2%	6.6%	4.7%	11.9%
15 to 19 years	6.5%	6.6%	5.2%	7.0%	9.5%	11.4%	3%	4.4%	7.7%	3.4%	3.9%	6.2%	5%	10.4%
20 to 24 years	6.7%	6.9%	5.8%	7.3%	24.8%	19.6%	5.7%	10.7%	1.6%	5.8%	5.3%	4.6%	12. 2%	7.1%
25 to 29 years	7.1%	6.8%	7%	3.4%	8.5%	6.3%	5.4%	4.2%	2.1%	6.8%	4.9%	4.4%	5.6%	8.7%
30 to 34 years	6.8%	6.1%	6.1%	4.6%	6.3%	4.6%	8%	5.7%	4.5%	4.2%	2.5%	5.7%	6.5%	6.3%
35 to 39 years	6.5%	6%	7.1%	7.0%	4%	3.7%	6.9%	3.1%	9.1%	7.1%	3.7%	6.0%	5.7%	7.6%
40 to 44 years	6.1%	5.7%	5.8%	5.9%	2.9%	6.6%	3.9%	7.3%	4.5%	8.8%	7.4%	10.2%	5.6%	7.7%
45 to 49 years	6.3%	6.3%	6%	8.5%	5%	5.7%	3%	7.9%	6.3%	8.1%	2%	7.4%	6%	4.4%
50 to 54 years	6.4%	6.7%	5.9%	6.8%	4.9%	6.6%	5.8%	12.2%	8.9%	9.6%	8.1%	9.1%	4.9%	7.1%
55 to 59 years	6.7%	7.1%	5%	8.6%	5.5%	7.2%	9.4%	9.7%	7%	13.7%	12.7%	9.4%	7.7%	4.1%
60 to 64 years	6.2%	6.9%	11. 7%	7.8%	4.9%	4.6%	9.2%	3.1%	8.8%	5.3%	12.5%	6.7%	9.2%	3.8%
65 to 69 years	5.3%	5.8%	8.3%	5.6%	5.6%	3.3%	9.7%	4.6%	5.5%	3.1%	8%	4.7%	7.8%	4.0%
70 to 74 years	4.1%	4.3%	4.4%	4.6%	3.3%	3.0%	3.5%	2.5%	4.5%	1.4%	6.5%	2.9%	3.7%	2.5%
75 to 79 years	2.8%	2.9%	5.1%	2.3%	2%	2.3%	4%	3.2%	3.7%	0.0%	2.8%	4.0%	1.8%	0.6%
80 to 84 years	1.9%	1.9%	0.7%	1.2%	1.6%	2.0%	4.5%	3.8%	2.4%	0.8%	2%	0.7%	1.7%	0.3%
85 years and +	2.0%	2.2%	1.6%	1.5%	2.3%	2.1%	2.5%	2.5%	0.2%	0.0%	2.2%	2.1%	0.5%	0.2%

Sources:

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0101](#)  
 ACS 2010 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0101](#)

## **Diversity**

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Total Population	331,449,281	10,077,331	5,899	5,903	20,629	21,355	4,140	3,905	2,310	2,285	810	826	1,702	1,623
White alone	61.6%	73.9%	89.9%	94.3%	87.2%	91.1%	89.0%	94.6%	92.3%	94.8%	91.4%	93.5%	87.4%	88.7%
Black or African American alone	12.4%	13.7%	0.3%	0.3%	3.0%	4.4%	0.6%	0.5%	0.3%	0.5%	0.0%	0.1%	1.1%	2.1%
American Indian and Alaska Native alone	1.1%	0.6%	2.6%	3.0%	1.5%	1.5%	2.3%	1.9%	1.9%	2.9%	2.2%	2.4%	2.1%	3.7%
Asian alone	6.0%	3.3%	0.5%	0.3%	1.0%	0.9%	1.1%	1.0%	0.4%	0.4%	0.0%	0.6%	0.4%	0.6%
Native Hawaiian and Other Pacific Islander alone	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%	0.0%
Some Other Race alone	8.4%	2.2%	0.3%	0.0%	0.7%	0.3%	0.6%	0.2%	0.1%	0.0%	0.2%	0.0%	1.1%	0.2%
Two or More Races	10.2%	6.3%	6.4%	2.0%	6.5%	1.8%	6.4%	1.9%	5.1%	1.4%	5.9%	3.4%	7.9%	4.7%

Sources:

DEC 2020 Redistricting Data for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [P1](#)

DEC 2010 Redistricting Data for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [P1](#)

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Total Population	326,569,308	9,973,907	5,925	5,912	20,631	21,247	3,907	3,783	2,428	2,480	891	900	1,477	1,742
Hispanic Population	18.2%	5.2%	0.9%	0.8%	2.7%	1.9%	0.0%	1.7%	4.4%	0.7%	0.1%	2.9%	1.2%	0.7%

Sources:

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0601](#)

ACS 2010 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0601](#)

## Marital Status

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Total (Ages 15+)	265,832,167	8,199,786	5,074	4,844	18,788	18,899	3,300	3,215	1,864	1,937	753	757	1,238	1,306
Never Married	33.5%	33.2%	29.4%	25.0%	56.1%	46.8%	25.7%	28.3%	23.6%	21.5%	22.3%	29.5%	30.9%	32.9%
Married	48.1%	48.1%	58.6%	65.2%	30.1%	37.7%	55.2%	49.7%	59.2%	71.7%	59.0%	57.1%	49.8%	44.8%
Divorced or Separated	12.7%	12.8%	9.2%	4.1%	9.0%	9.7%	12.6%	11.5%	12.2%	5.3%	12.0%	7.9%	14.8%	18.4%
Widowed	5.7%	5.9%	2.8%	5.7%	4.8%	5.8%	6.5%	10.5%	5.0%	1.4%	6.8%	5.5%	4.5%	3.9%

Sources:

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0601](#)

ACS 2010 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0601](#)

## Income

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Total Households	122,354,219	3,980,408	2,468	2,149	8,182	7,994	1,678	1,564	860	920	378	345	607	629
Less than \$10,000	5.8%	6.4%	3.9%	3.5%	9.9%	15.7%	5.5%	5.6%	5.6%	2.0%	6.6%	8.1%	5.4%	10.8%
\$10,000 to \$14,999	4.1%	4.1%	1.7%	5.0%	7.0%	8.9%	0.7%	9.9%	1.6%	1.4%	2.4%	5.5%	5.8%	15.3%
\$15,000 to \$24,999	8.5%	9.2%	8.6%	8.1%	9.7%	13.2%	11.1%	11.4%	5.0%	7.1%	10.6%	13.9%	10.7%	12.6%
\$25,000 to \$34,999	8.6%	9.6%	3.6%	5.9%	15.0%	10.3%	6.9%	10.4%	5.5%	8.6%	6.1%	13.0%	11.4%	15.7%
\$35,000 to \$49,999	12.0%	13.3%	11.2%	14.2%	13.8%	12.5%	12.4%	6.9%	10.9%	11.8%	14.6%	16.5%	14.3%	16.1%
\$50,000 to \$74,999	17.2%	18.2%	22.0%	20.6%	19.7%	16.7%	22.2%	19.6%	23.5%	26.0%	29.1%	23.8%	21.1%	14.0%
\$75,000 to \$99,999	12.8%	12.9%	25.4%	17.9%	9.6%	9.4%	13.2%	15.9%	13.3%	21.6%	18.8%	13.9%	13.3%	11.3%
\$100,000 to \$149,999	15.6%	14.6%	13.6%	16.2%	8.7%	9.0%	16.1%	10.8%	25.7%	15.3%	7.9%	4.3%	12.5%	3.3%
\$150,000 to \$199,999	7.1%	5.9%	6.9%	3.3%	3.0%	2.7%	6.1%	4.6%	4.2%	2.3%	3.4%	0.0%	4.8%	0.3%
\$200,000 or more	8.3%	5.7%	3.1%	5.3%	3.8%	1.6%	5.8%	4.9%	4.8%	3.9%	0.5%	0.9%	0.7%	0.6%

Median income (dollars)	64,994	59,234	69,651	64,043	42,746	36,797	64,700	58,750	68,571	69,783	56,071	42,679	51,394	31,736
Mean income (dollars)	91,547	80,803	79,070	77,204	62,310	53,479	83,258	69,387	85,123	83,150	62,323	47,850	61,543	45,592

Sources:

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S1901](#)

ACS 2010 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S1901](#)

## Employment & Poverty

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Civilian Labor Force (16+)	164,759,496	4,956,499	3,141	3,209	11,558	11,181	1,784	1,979	1,163	1,404	436	449	807	774
Employed	59.6%	57.7%	60.2%	63.3%	57.6%	55.6%	52.7%	61.1%	58.8%	69.3%	53%	52.2%	63.3%	52.7%
Unemployed	3.4%	3.7%	2.9%	4.3%	4.3%	4.0%	1.8%	1.8%	4.2%	3.8%	5.8%	8.1%	2.4%	8.6%
Armed Forces	0.4%	0.1%	0%	0.3%	0.3%	0.1%	0.5%	0.0%	0%	0.0%	0%	0.0%	0%	0.0%
Not in Labor Force	36.6%	38.5%	36.9%	32.2%	37.8%	40.4%	45.1%	37.1%	37%	26.9%	41.2%	39.7%	34.3%	38.6%
BELOW POVERTY LEVEL*	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2012	Marquette City 2020	Marquette City 2012	Marquette Twp. 2020	Marquette Twp. 2012	Sands Twp. 2020	Sands Twp. 2012	Skandia Twp. 2020	Skandia Twp. 2012	West Branch Twp. 2020	West Branch Twp. 2012
All People	12.8%	13.7%	8.9%	6.1%	26%	25.9%	5.5%	11.8%	12.8%	12.2%	8.5%	13.4%	20.4%	31.2%
Under 18 years	17.5%	18.8%	16.4%	3.4%	25.6%	19.7%	0%	7.9%	3.1%	18.6%	5.2%	9.7%	44.4%	44.9%
18 to 64 years	12.1%	13.4%	8.1%	6.4%	30.9%	30.2%	7.5%	12.9%	16.9%	10.9%	9.9%	14.9%	17%	28.3%
65+ Years	9.3%	8.5%	5.3%	8.1%	4.5%	10.9%	4.5%	11.6%	11.8%	4.6%	7.3%	9.9%	5.3%	11.5%

Sources:

\*2010 poverty level information not available. 2012 used instead for comparison

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [DP03](#), [S1701](#)

ACS 2010 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [DP03](#)

ACS 2012 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S1701](#)



## Housing

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Homeownership Rate	64.4%	71.7%	89.0%	89.6%	47.3%	53.2%	65.7%	64.6%	91.9%	91.3%	91.5%	94.2%	50.4%	49.4%
US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Housing Units	140,498,736	4,570,173	2,833	2,824	9,114	8,756	2,094	1,907	982	960	420	478	843	933
US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Total Households	122,354,219	3,980,408	2,468	2,149	8,182	7,994	1,678	1,564	860	920	378	345	607	629
Married Couple family	48.1%	46.9%	59.6%	70.1%	31.9%	42.0%	50.7%	47.1%	57.8%	74.5%	55.0%	60.3%	49.8%	43.4%
Cohabitating Couple	6.5%	6.9%	9.7%	*	11.1%	*	1.6%	*	9.7%	*	7.1%	*	9.9%	*
Male Householder	17.8%	18.7%	14.5%	2.7%	24.0%	2.7%	18.9%	4.7%	15.2%	2.9%	16.7%	4.1%	15.8%	2.2%

Female														
Householder	27.6%	27.5%	16.2%	4.4%	33.0%	6.6%	28.8%	5.9%	17.3%	6.1%	21.2%	9.9%	24.5%	18.4%
Householder														
Living Alone	28.0%	29.9%	20.8%	18.8%	35.7%	37.7%	39.6%	32.6%	20.3%	14.1%	26.5%	24.6%	27.2%	30.0%
65+														
Householder														
Living Alone	11.3%	12.3%	8.0%	6.1%	10.9%	11.6%	26.3%	20.6%	6.6%	0.7%	13.5%	9.0%	9.1%	4.8%

Sources:

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [DP02](#), [H1](#), [S1101](#)

ACS 2010 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [DP02](#), [H1](#), [S1101](#)

\*Cohabiting Couple information not recorded prior to 2019

## Education

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Population 25 years and older	222,836,834	6,853,674	4,420	4,002	11,705	12,307	2,961	2,643	1,640	1,708	671	660	984	1,001
Less than High School graduate	11.5%	8.7%	3.8%	6.6%	4.6%	8.1%	3.9%	8.3%	4.5%	5.6%	7.5%	13.5%	3.9%	10.8%
HS or Equivalent	26.7%	28.5%	22.4%	26.1%	21.3%	26.3%	25.5%	25.8%	28.7%	29.0%	38.6%	40.9%	28.2%	35.4%
Some College or Associate's Degree	28.9%	32.8%	32.0%	28.3%	26.7%	26.7%	34.3%	25.3%	32.0%	27.9%	31.9%	30.0%	37.7%	33.5%
Bachelor's Degree	20.2%	18.3%	29.2%	24.6%	32.5%	25.1%	23.4%	28.2%	25.1%	27.2%	16.5%	12.1%	20.7%	14.7%
Graduate or Professional Degree	12.7%	11.7%	12.6%	14.5%	15.0%	13.8%	12.9%	12.4%	9.8%	10.4%	5.5%	3.5%	9.6%	5.7%

Sources:

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0601](#)

ACS 2010 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0601](#)

## Language

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2010	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2010	Sands Twp. 2020	Sands Twp. 2010	Skandia Twp. 2020	Skandia Twp. 2010	West Branch Twp. 2020	West Branch Twp. 2010
Population 5 years and over	306,919,116	9,405,581	5,667	5,585	20,026	20,570	3,700	3,618	2,246	2,343	867	862	1,370	1,638
English Only	78.5%	90.3%	98%	98.3%	95.9%	95.6%	95.1%	95.5%	98%	95.9%	96.1%	98.1%	97.4%	96.8%
Spanish	13.2%	2.9%	0.8%	1.7%	1.4%	1.0%	0%	2.3%	0.3%	1.1%	0%	0.6%	0.9%	0.2%
Other Indo-European languages	3.7%	2.9%	0.3%	0.5%	1.8%	1.9%	0%	1.4%	1.5%	3.0%	3.2%	0.8%	1%	2.2%
Asian/Pacific Islander languages	3.5%	1.7%	0.5%	0.3%	0.1%	0.5%	4.2%	0.8%	0.2%	0.0%	0.5%	0.0%	0.7%	0.0%
Other languages	1.1%	2.2%	0.3%	0.0%	0.7%	0.9%	0.7%	0.0%	0%	0.0%	0.2%	0.5%	0%	0.8%
Speaks English less than "very well"	8.2%	3.4%	0.6%	0.9%	0.9%	0.8%	4.2%	0.9%	0.2%	0.6%	0.5%	0.0%	0.4%	0.2%

Sources:

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0601](#), [S1601](#)

ACS 2010 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S0601](#), [S1601](#)

## Disabilities

US CENSUS DATA	US 2020	MI 2020	Chocolay Twp. 2020	Chocolay Twp. 2012	Marquette City 2020	Marquette City 2010	Marquette Twp. 2020	Marquette Twp. 2012	Sands Twp. 2020	Sands Twp. 2012	Skandia Twp. 2020	Skandia Twp. 2012	West Branch Twp. 2020	West Branch Twp. 2012
Total Civilian Noninstitutionalized Population	321,525,041	9,866,076	5,925	5,933	19,457	19,681	3,892	3,888	2,401	2,485	891	823	1,477	1,469
Ambulatory Difficulty	6.8%	7.6%	6.9%	4.0%	4.6%	5.1%	10.2%	7.3%	9%	5.3%	6.5%	9.7%	6.9%	5.4%
Cognitive Difficulty	5.1%	6%	3.3%	3.1%	5%	4.0%	6.5%	4.3%	5%	2.5%	4.3%	6.2%	6.9%	6.5%
Hearing Difficulty	3.6%	3.9%	3.3%	4.9%	2.7%	3.3%	5.1%	4.1%	5.4%	2.8%	5.3%	4.1%	3.5%	2.1%
Independent Living Difficulty	5.8%	6.5%	3.5%	2.7%	4.5%	3.8%	7.1%	4.8%	5.1%	3.9%	4.6%	5.2%	6.1%	5.1%
Self-Care Difficulty	2.6%	2.9%	2.6%	1.6%	2%	1.8%	6.4%	2.7%	2.6%	1.6%	2.2%	4.3%	3.5%	2.2%
Vision Difficulty	2.4%	2.2%	2.1%	1.7%	2%	1.8%	1.5%	1.4%	2.3%	2.3%	1.6%	2.2%	1.5%	1.1%

Sources:

ACS 2020 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S1810](#)

ACS 2012 5-Year Estimates for US, MI, Chocolay Twp., Marquette City, Marquette Twp., Sands Twp., Skandia Twp., and West Branch Twp. [S1810](#)



Farmington Community Library

# Strategic Plan

## 2023 – 2029

[www.farmlib.org](http://www.farmlib.org)



One Library, Two Locations

FCL Farmington Hills: 32737 West 12 Mile Road

FCL Farmington: 23500 Liberty Street



## WHY

The Farmington Community Library is a lifelong resource for the community. The library's committed staff, engaged patrons, and essential services create a welcoming and supportive community space. To align resources with the emerging priorities of the community, FCL has undergone a comprehensive strategic planning process with feedback from the community and stakeholders. By implementing a renewed strategic plan, FCL will focus efforts on creating community, expanding connections, and cultivating curiosity.

## HOW

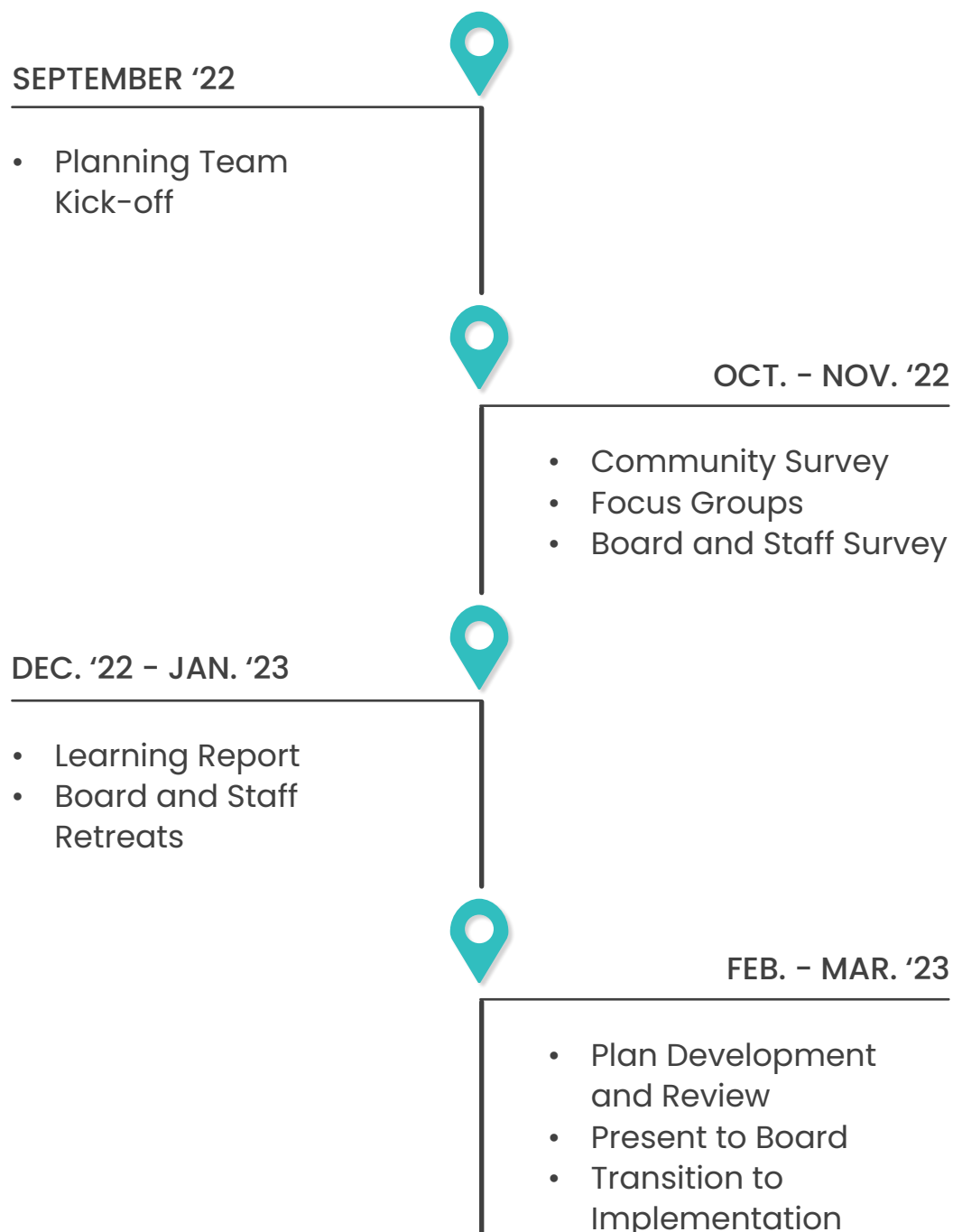
FCL initiated a strategic planning process in the Summer of 2022. Amanda E. Standerfer from [Fast Forward Libraries LLC](#) was engaged in August 2022 to facilitate the planning process in three phases: Learn, Dream, Do. The Learn phase entailed forming a Planning Team to guide the process, holding staff and Board of Trustee sessions, conducting a community survey, and leading focus groups. In the Dream phase, the Planning Team discussed possible future pathways for the library. This strategic plan will guide FCL through the Do phase, as the library executes its vision for the future.



# PROCESS TIMELINE

SEPTEMBER 2022 – MARCH 2023

The Planning Team spent months learning about community needs and developing strategies to advance the library's mission over the next seven years.





# VISION & MISSION



## **Vision**

Growing a vibrant, connected community

## **Mission**

We engage our diverse community through resources and experiences that celebrate ideas, inspire creativity, and enrich lives.



# STRATEGIC DIRECTION 1

## Create Community

We positively impact our community by providing a variety of library spaces, ensuring accessible services, and supporting collaboration and inclusion.

### Goals

1. Create functional, welcoming, and collaborative spaces to engage and explore.
2. Provide barrier-free access to resources that support community members of all ages, backgrounds, and abilities.

### Possible Outcomes

- People enjoy using the building
- High staff satisfaction
- Increased usage
- Space use is maximized
- Patrons find what they need
- Patrons feel supported
- Patrons think of the library first when they have a need



# STRATEGIC DIRECTION 2

## Expand Connections

We are a vital community resource. We aim to broaden partnerships, increase awareness, and foster new connections that emphasize the value of our work.

### Goals

1. Explore and develop collaborations to raise awareness and impact of community resources.
2. Every community member understands that the library is vital and valuable.
3. Cultivate a sense of belonging for every community member at every stage of life.

### Possible Outcomes

- Increased awareness
- Increases partnerships
- Increased usage
- Satisfaction with the library
- Patrons share stories of their connection to the community
- Patrons report their culture is reflected in the collection and programs





# STRATEGIC DIRECTION 3

## Cultivate Curiosity

Library staff and Board members are integral to our success. We will encourage an internal culture of growth that influences how we learn from and serve the community.

### Goals

1. Nurture a responsive and innovative work culture that empowers staff members.
2. Utilize community input and data to evolve resources and explore new possibilities.
3. Ensure a sustainable future through prudent financial planning and intentional Board development.

### Possible Outcomes

- Staff retention and high job satisfaction
- Patrons are satisfied with collections, services, technology, and programs
- Trustees feel equipped to make decisions
- Staff have data to make changes to collections, services, technology, and programs
- Successful millage
- Board satisfaction



# NEXT STEPS

## Implementation and Evaluation

Now that this plan has been adopted by the Farmington Community Library Board of Trustees, the staff will develop an activity plan to guide implementation. Implementation is a continual process. The timing of certain activities will be determined by priority and influenced by various factors, such as funding and other resource allocation. Review and adjustment of the activity plan will happen on a regular basis.

Evaluation of the plan will be ongoing once implementation is underway. The status of the plan and its implementation will be reported regularly to Trustees and stakeholders.



11/9/2023

TO: Board of Trustees, Shorewood-Troy Library

FROM: Jennie Mills, Director

RE: Lease Update

Our attorney has not yet received the updated lease back to sign from the Michas family or their attorney. He did contact Mr. Gallo immediately after the Board meeting (October 16<sup>th</sup>) and then followed up again on October 23<sup>rd</sup>, letting Mr. Gallo know that the Library's Board meeting was on the 9<sup>th</sup>.

As soon as he receives the updated lease, I will let the Board know, and our attorney will begin the review process.

The Board has also requested clarification on how the lease would handle termination of the contract should the Library's facility ever change location. The current contract states in Section 2:

Section 2 of the current lease states:

The Lease Term. The term of this Lease shall commence on the date hereof ("Commencement Date") and shall expire upon the earlier of (1) **the District vacating its facility at 650 Deerwood Drive Shorewood, IL 60404** or (2) July 9 , 2035. Prior to the Lease terminating on July 9 , 2035 and if there are no events of default, the parties will make best efforts to extend the Lease under terms and provisions mutually agreeable to both parties.

There is no indication that that clause will be struck from the revised lease.

November 9, 2023

TO: Shorewood-Troy Library Board of Trustees

FROM: Jennie Mills, Director

RE: Approve 2023 Levy Ordinance 23-02

Once the levy is passed, it is submitted to the Will County Clerk's office. The Library will be notified in late March of the amount levied.

The Truth in Taxation notice, passed by the Board in October, was published in the November 1<sup>st</sup> *Shorewood Sentinel*, giving the public notice of tonight's public hearing. Notice was also provided on the Library's website.

Ordinance **23-3**  
Tax Levy Ordinance  
Of the  
Shorewood-Troy Public Library District  
Will County, Illinois  
For Fiscal Year July 1, 2023, to June 30, 2024

AN ORDINANCE for the Assessment, Levy, and Collection of taxes within the Corporate Limits for the general corporate purposes of the SHOREWOOD-TROY PUBLIC LIBRARY DISTRICT, WILL COUNTY, ILLINOIS, for the fiscal year commencing July 1, 2023, and ending June 30, 2024; for a special audit expense tax levy, for a special liability insurance expense tax levy, for a special municipal retirement expense tax levy, and for a special equipping and maintenance expense tax levy for said fiscal year. BE IT ORDAINED by the Board of Trustees of the SHOREWOOD-TROY PUBLIC LIBRARY DISTRICT, WILL COUNTY, ILLINOIS:

SECTION 1:

That there be, and hereby is, levied and assessed upon all taxable property, both real and personal, within the Shorewood-Troy Public Library District, Will County, Illinois, and the same assessed and equalized for state and county purposes taxes sufficient to produce the sum of \$1,441,988 of which sum is levied together with \$958,00 to be derived from other sources, being in the total amount appropriation legally made for general library purposes for said taxable year, which sum is to be used for, has been appropriated for purposes and the amount specified as follows, to wit:

**Levy:**

Unemployment / WC Levy	\$ 7,352
General Corporate Tax Levy	\$1,401,617
Audit Tax Levy	\$ 1,222
Liability Insurance Tax Levy	\$ 6,414
Municipal Retirement Tax Levy	\$ 11,132
Building Maintenance Tax Levy	\$ 14,251
<b>Total 2023 Levy</b>	<b>\$1,441,988</b>

**Other Income:**

Personal Property Replacement Tax	\$ 80,000
State Per Capita Grant	\$ 35,000
Interest	\$ 40,000
Fines	\$ 6,000
Copy Machines	\$ 7,000
Miscellaneous Income	\$ 400,000
Donations / Gifts / Grants	\$ 350,000
Contribution / Impact Fees	\$ 40,000
<b>Total Other Income</b>	<b>\$ 958,000</b>



**Expenditures:**

Payroll Related Exp.:	\$1,107,000
Library Materials:	\$ 200,000
Contractual Services:	\$ 360,000
Supplies & Services:	\$ 100,000
Misc. Expense:	\$ 42,000
Util. & Building Expense:	\$ 128,000
Capital Expenses:	\$ 450,000
Overhead Expenses:	\$ 80,000

<b>Total Expenditures</b>	<b>\$2,467,000</b>
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**SECTION 2:**

This Ordinance shall take effect and be in force ten (10) days after its legal passage and approval and shall be known as Ordinance **23-03** Tax Levy Ordinance of the Shorewood-Troy Public Library District, Will County, Illinois.

Passed by the Board of Trustees of the Shorewood-Troy Public Library District at a regular meeting held on November 9, 2023,

Approved this 9<sup>th</sup> day of November 2023.

---

President, Board of Trustees  
Shorewood-Troy Public Library District  
Will County, Illinois

ATTEST:

---

Secretary, Board of Trustees  
Shorewood-Troy Public Library District  
Will County, Illinois

CERTIFICATION OF LEVY ORDINANCE  
IN ACCORDANCE WITH CHAPTER 120, PARAGRAPH 643 OF  
ILLINOIS REVISED STATUTES

The undersigned, being Clerk/Secretary and Chief Fiscal Officer of the taxing district hereinafter named, do hereby certify that attached hereto is a true and correct copy of the Levy Ordinance of said district for its 2023-2024 fiscal year, adopted November 9, 2023.

We further certify that the Truth in Taxation Notice was published in the *Shorewood Sentinel*, setting forth notice of the public hearing, held on November 9, 2023.

This certification is made and filed pursuant to the requirements of Public Act 83-881 and on behalf of Shorewood –Troy Public Library District, Will County, Illinois.

Dated: November 9, 2023

\_\_\_\_\_  
Karen Voitik, Secretary

\_\_\_\_\_  
Thomas Novinski, Chief Fiscal Officer

**Certificate of Compliance in Truth in Taxation**

In Accordance with Chapter 35 Sections 200/18-55 through 200/18-101.65 Illinois Compiled Statutes

I, **Thomas Novinski**, hereby certify to the Will County Clerk that the **Shorewood-Troy Public Library District** has complied with all provisions of Truth in Taxation, as amended with respect to the adoption of the tax levy for the year **2023-2024**.

The District levied an amount of ad valorem tax that is greater than 105% of the final aggregate extension plus any amount abated prior to the extension for the preceding year; therefore, the publication and hearing provisions for Truth In Taxation are **applicable** and have been met. Said public hearing was held on **November 9, 2023**.

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Signature of Presiding officer

---

(Date)

November 9, 2023

TO: Shorewood-Troy Library Board of Trustees

FROM: Jennie Mills, Director

RE: Annual Treasurer's Report

The Annual Treasurer's Report is an accounting of our revenues and expenditures for the last fiscal year; districts have 6 months after the close of the fiscal year to prepare the report. This report is prepared after the audit is presented to the Board. It shows income by line item, outgoing payments to vendors with which the Library spent more than \$2,500 within FY23, and the salaries of staff (categorized by quartile that they fall into).

The report will be filed with the Will County Clerk's office and printed by the *Shorewood Sentinel* once approved by the Board and signed by the Board's Treasurer.

Shorewood-Troy Public Library District  
Annual Treasurer's Report  
Year Ended June 30, 2023

**Revenue Summary:**

Property taxes, \$1,240,627; Grants, \$303,086; Photocopy Receipts, \$4,130; Fines & Fees, \$3,494; Passport Fees, \$35,036; Interest Income, \$14,418; Personal Property Replacement Tax, \$80,122; Donations, \$3,415; Impact Fees, \$33,290; Fax Service, \$1,030; Pinnacle Reimbursements, \$145,780; Room Rent, \$260; Miscellaneous, \$8,012.

**Expenditure Summary:**

**Vendors Paid in Excess of \$2,500.00:** Amazon Capital Services, \$38,615; AT&T, \$7,127; Baker & Taylor, \$94,601; Best Quality Cleaning, \$16,547; Brian Zabel and Associates, \$3,750; Bridgeall Libraries Limited, \$8,298; Chase Card Services, \$44,987; Children's Plus, \$4,597; Cintas Fire Protection, \$2,984; ComEd, \$8,692; Crossmark Printing, \$19,771; Diverzify+, LLC, \$93,958; Ferrari Accounting Services, \$7,200; Findaway World, \$3,514; Illinois Municipal Retirement Fund (Employer Share), \$37,088.35, Illinois Municipal Retirement Fund (Employee Share), \$50,414.79; Johansen & Anderson, \$11,316; Kanopy, Inc, \$3000; Konica Minolta Premiere Finance, \$6,441; L. DeGeus & Associates \$3,295; Legend Technology Services, \$32,610; Libraries of Illinois Risk Agency, \$12,949; Library Ideas, LLC, \$2,752; LIMRiCC-PHIP (Health Insurance)-Employer Share; \$53,730.26; LIMRiCC- PHIP (Health Insurance) – Employee Share, \$13,863.06; LIMRiCC UCGA (Unemployment compensation insurance, \$3,666; Library Ideas, LLC, \$3,366; Midwest Tape, \$15,652; Nicor Gas, \$4,042; Ollis Book Corporation, \$4,998; Orkin, \$3,590; Otis Elevator Co., \$6,094; Overdrive, \$25,000; Patron Point, \$6,333; Paylocity, \$7,410; Pinnacle Library Cooperative, \$74,705; ProQuest, LLC, \$4,716; Reaching Across IL Library System, \$9,077; Rival5 Technologies Corp, \$7,433; Service 1, Inc, \$8,700; Technology Management Revolving Fund, \$3,120; The Ethos Workshop, \$40,594; TIMM Electric, \$2,733; Today's Business Solutions, \$6,222; TZ Landscaping, \$4,530; US Post Office, \$5,315; Village of Shorewood, \$5,822; Wunderlich Doors, \$15,409.

**Compensation Summary**

**Under \$25,000:** Adamson, Stephanie; Alamanza, Melissa; Anil, Usha; Guzman, Ana; Guzman, Violet; Haish, Sarah; Hughes, Emily; Hurtado, Mary; Jeffery, Meesum; King, Kimberlee; Lyznicki, Tina; Mahoney, Caitlin; Monarrez, Gabriela; Norman, Cindy; Rolando, Gina; Roper, Jessica; Wolcott, Oliver.

**\$25,000.00 to \$49,000.00:** Barbel, Mara; Freeman, Lori; Goode, Rebecca; Lovato, Leslie; Patton, Kimberlee; Perenchio, Julie.

**\$50,000 to \$74,999.99:** Hornberger, Julie; Rodriguez, Shalyn.

**\$75,000 to \$99,999.99:** Hammermeister, Matthew; Mills, Jennifer Cisna

**Cash on Hand at Close of Fiscal Year 2022-2023**

\$964,875

I hereby certify that this is a true copy of the Annual Treasurer's Report of the Shorewood-Troy Library District for the Fiscal Year ended June 30, 2023.

---

Robert J. Stahl, Treasurer

11/9/2023

TO: Board of Trustees, Shorewood-Troy Library

FROM: Jennie Mills, Director

RE: Website Re-Design

The Shorewood-Troy Library's current website does not meet ADA-standard (Americans with Disability Act Standards, is not always mobile-friendly and is not always search-engine optimized.

A Request for Proposal was released, with twelve (12) total proposals received by the Library. The lowest respondent was **Vibe Marketing at \$7,472**. They are included in the spreadsheet that tabulates the responses; however, 1) they are headquartered in the United Kingdom, 2) provided no library references, and 3) all references are outside the United States. They are also missing key elements of the specifications, including providing website hosting, cost for support hours if needed post-design stage, and web backup.

The next three lowest:

- CyberOptik (\$8600 + \$720 annually for hosting)
- Proof Studio (\$8,600 + \$350 annually for hosting)
- WebLinx (\$8,910 + \$300 annually hosting)

References are provided behind each companies' proposal, with the exception of **Vibe, which did not provide library references.**

Other firms submitting, in alphabetical order, with cost for website design:

- Beyond Technologies; \$34,409
- Micronix; \$48,000
- MobiKasa; \$65,000
- MultQos; \$9,300 (no library clients were provided)
- Softices: \$8,200, but with annual maintenance costs of \$10,000
- Ulime Creative \$49,500

Two firms provided inexact quotes (which did not meet the specifications of the Request for Proposal):

- Byte: \$6,600 - \$15,400
- Schall Creative: \$50,000 - \$60,000

In your Board packet, I've included a table tabulating the responses to the RFP, along with references received from libraries that have used CyberOptik, Proof Studio, and WebLinx; Vibe did not provide any

<u>Website Developer Comparisons</u>											
Company	Cost	Annual Hosting Fee	ADA-Compliant	Support-Hours Cost	Timeline	Web Backup	Training	Mobile-Friendly	Library References?	Integration w/Outside Vendors	Custom Forms
CyberOptik	\$8,600	\$720/\$1,200	Yes	Included in Hosting cost	17 weeks	Yes	Yes	Yes	Yes	Yes	Yes
Proof Studios	\$8,600	\$350	Yes	\$125 hourly	16 weeks	Yes	Yes	Yes	Yes	Yes	Yes
WebLinx	\$8,910	\$300	Yes	\$135 hourly	19-21 weeks	Yes	Yes	Yes	Yes	Yes	Yes
Vibe Marketing	\$7,472	None Provided	Yes	None Provided	8 weeks	No	No	Yes	None Provided	Yes	Yes





# **Proposal to the Shorewood-Troy Library**

**Website Redesign**  
**October 16, 2023**

**This document contains material classified “Confidential”. Except as specifically authorized by Vibe Marketing the holder of this document shall keep the information contained herein confidential and shall protect the same in whole or in part from disclosure or dissemination to any unauthorized party.**

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## 1. Introduction

Dear Client,

I am pleased to introduce myself and my company, Vibe Marketing. We are excited to get to work on your requirements for “Website Redesign” and we want to make sure you are satisfied with our proposal and have a full understanding of what to expect in this process.

Website work is exciting, and our expert team is fully capable of giving you something unique that will help to achieve your goals.

The following proposal will set a project road map from start to finish. You will have a complete understanding of the process and timeline for completion. If you have any questions or concerns, please contact me personally.

Sincerely,



Anco van Raalte

Director

[www.vibemarketing.nl](http://www.vibemarketing.nl)

E: [anco@vibemarketing.nl](mailto:anco@vibemarketing.nl)

T: +352 691 106 018

LinkedIn [page](#)

## **2. About Vibe Marketing**

Vibe Marketing is the leading website design and development and end to end digital marketing company. We are unique in our service offering because we are the only company to offer a comprehensive suite of affordable solutions for any kind and size of organizations. Our management teams are entrepreneurs and industry pioneers from Silicon Valley and Fortune 500 companies working in web, mobile, interactive and new media technologies. We have a team of nearly 100 developers who have created hundreds of websites for all kinds of organizations around the world on various platforms. Since its foundation in 2004 Vibe Marketing has quickly become an established thought leader in the web era, constantly exploring the boundaries of what can be done with web platforms.

Vibe Marketing is now recognized as a premier website development agency with a strong track record of developing compelling interactive websites and reputable brands in its portfolio. More information about our portfolio you will find on <https://www.vibemarketing.nl/portfolio/> Vibe Marketing offers a full suite of website products and services, developed with the most stringent technical standards, and uncompromising attention to detail. Vibe Marketing's experienced staff of engineers, graphic designers; creative and strategic personnel help our clients achieve their web goals.

Vibe Marketing headquarters are in London UK with business development and sales offices located throughout the UK, Ireland, France, Australia, The Netherlands, Iraq, Malta, Latvia, South Africa, Jordan and Slovenia .

### 3. What to Expect (Our Approach)

Web design and development is serious business. It takes time and patience to create something that works for you and that is free of bugs and other issues. Updates are required, but it is important to start with a sound foundation. At Vibe Marketing, we believe in a thorough approach that provides our clients with as much engagement as they request. While our entire team will be working on your website, we will assign a project lead who will be your main point of contact.

Vibe Marketing has all the expertise available to cover a very broad range of technical requirements. Below you find a non-exhaustive overview.

- Domain and web hosting: web hosting services, domain registrations, email solutions, technical support, dedicated hosting, Single Sign-On (SSO), etc.
- Web utilities: OsCommerce, Zen Cart, X-Cart, Squarespace, WordPress, Drupal, Webflow, Ruby on Rails, PHPBB, Sugar CRM, PHP Live Chat, Vimeo, etc.
- Designing tools: Photoshop, Adobe Illustrator, Adobe Imageready, Adobe Premiere Pro, Canva, PageMaker, FreeHand, Flash, Adobe Director, CorelDraw, 3DS Max, Sound Forge, Adobe Dreamweaver, Microsoft FrontPage, etc.
- Scripting languages: HTML, DHTML, XHTML, XML, WML, JavaScript, CSS, Flash Scripts, etc.
- Programming environments: ASP.NET - C# & Visual Basic, Java - JDBC & Advanced Java, PHP 5.2, Smarty, AJAX, Joomla, Mambo, Cake PHP, Ruby on Rails, Python, Objective C, etc.
- Web architecture: WEB2.0, Module View Controller (MVC), etc.
- Operating environments: Windows, Linux, Mac, etc.
- Database environments: MS SQL SERVER 2000/2005, MYSQL 5.2, PGSQL 5.0, ORACLE, SQLite, Postgres, MariaDB etc.

The Vibe Marketing Core Project Team that will work on the project consists of the following roles:

1. Project Manager
  - a. 10+ years of experience as a PM
  - b. 10+ years of experience with Agile
  - c. Very strong communicator
2. UX/UI Designer
  - a. 10+ years of experience as a designer
  - b. Very advanced creativity and design skills
  - c. Expert in using a broad range of design tools
3. Web Developer
  - a. 10+ years of experience as a web developer
  - b. Highly skilled expert who has worked with many different web technologies and architectures to build websites
  - c. In-depth knowledge of the programming and scripting languages needed for web development

All resources will be Vibe Marketing internal, we will not use sub-contractors. For certain deliverables or during certain phases of the project we may involve additional competencies as needed.

Vibe Marketing will deliver the project phase by phase:

## **1. Discovery Phase**

### **a. Needs Analysis:**

- i. Survey key staff to understand audience and programmatic scope, identify gaps in current website.

### **b. Technology Scoping:**

- i. Identify the best content management system and tools to meet the needs, keeping in mind ease of maintenance.

### **c. Content review, analysis, and creation:**

- i. Provide recommendations for reimagining the Shorewood-Troy Library content and navigation to improve user journey and spur action.
- ii. Help to write new content (from existing resources), or adapt current content as needed.

## **2. Design Phase**

### **a. Wireframes:**

- i. Provide wireframes to outline the website structure and layout, focusing on intuitive navigation and ensuring inspiring user experience for each target audience.

### **b. Graphic Design:**

- i. Create design mockups for the home page and key inner pages, in alignment with the Shorewood-Troy Library color palette and brand identity guidelines.

## **3. Development Phase**

### **a. Responsive Website Development:**

- i. Develop a fully responsive website compatible with various devices (desktop, mobile, tablet).
- ii. Implement the approved design mockups and integrate them with the chosen CMS.
- iii. Ensure proper formatting, optimization, and consistency of the content.

## **4. Content Migration, SEO and Testing**

### **a. Content Migration:**

- i. Migrate existing content from the current website to the new website.
- b. Search Engine Optimization (SEO):**
  - i. Conduct keyword research and optimize website content for improved search engine rankings, aligned with organic search data and paid search strategy.
  - ii. Implement on-page SEO techniques, including meta tags, headings, and alt tags.
- c. Integration of Communication Channels and other Platforms:**
  - i. Integration of social media
  - ii. Implement contact forms
  - iii. Integrate newsletter subscription forms to capture user information.

## **5. Training and Documentation Phase**

- a. Training and Documentation:**
  - i. Provide training sessions to the organization's staff on using the CMS and managing website content.
  - ii. Create documentation with step-by-step instructions for future reference.

## **6. Project Management**

- i. Vibe Marketing will assign a dedicated project manager responsible for coordinating tasks, managing timelines, and communicating with stakeholders.
- ii. Vibe Marketing will provide weekly progress updates and conduct meetings to discuss project status, address concerns, and gather feedback.

## **4. Requirements and Deliverables – Website Redesign**

Vibe Marketing is fully capable of delivering all requirements listed in the RFP document. We propose to use WordPress for building the website because it allows non-technical users to maintain the website without knowledge of coding.

### **4.1 Key Deliverables**

Shorewood-Troy Library has defined the following requirements for its new site:

1. Meets WCAG 2.1 A and AA conformance standards.
2. Optimizes the user experience for patrons. Simple, clear access to the library's catalog, event calendar, room reservation pages, patron accounts, and custom forms is required.
3. Content that can easily be maintained and updated by a minimal number of in-house library staff.
4. Uses WordPress as the platform.
5. Mobile responsive design
6. eCommerce functionality
7. CMS integration with other current apps
8. Search Engine Optimization

Furthermore Shorewood-Troy Library has listed the below functional requirements in its RFP document:

1. Integration with library applications, including, but not limited to:
  - a. Polaris, an Innovative Product. Library's integrated database of patrons & holdings, aka the ILS
  - b. Communico Event Calendar. Library's event calendar and room reservation software
  - c. Chat widget from Unique
2. Ability to display content in the following formats: .jpg, .pdf, .png, .Mp3, and mp4 video
3. Staff logins & authentication
  - a. Ability to require MFA
  - b. Ability to set session timeouts
  - c. Ability to restrict login access from approved vendor IPs
  - d. Secure API integration through token identification as needed
4. Custom forms & information submission



- a. Form ability to filter out malicious code/content/attachments/URLs
  - b. Require human verification before submission
- 5. General requirements, including hosting
  - a. BOT protection and DDOS protection
  - b. Address Web Application Firewall
  - c. Provide regular data backups
  - d. Verify safety & security of all CMS add-ons
  - e. Hosted in a US datacenter
  - f. Library holds encryption keys if needed

## **4.2 Assumptions**

1. All required design elements like e.g. logo, fonts and color palette have been defined and will be provided by the customer.
2. All the work to be done by Vibe Marketing will be done remotely from our delivery center in the UK.
3. The cost for any third-party integrations or APIs are to be borne by the client.

## 5. Project Implementation

### 5.1 Timelines

The Project Methodology used by Vibe Marketing is Agile. Together with the relevant stakeholder(s) from the Shorewood-Troy Library, at the beginning of the project the initial product backlog will be set up. The product backlog will be further enriched and completed throughout the duration of the project. Based on our experience and the information in the RFP document, the end to end timeline for a project like this is about 2 months. The detailed planning of the deliverables will be defined in approximately 4 Sprints of 2 weeks each, with the goal to deliver the new website fully functional by the mutually agreed launch date. Follow up on Sprints will be done through the typical Agile ceremonies: Sprint Planning, Daily Stand Up, Sprint Retrospective and Sprint Review.

The indicative timeline for the project, based on 4 Sprints is reflected in the below picture.

Sprint	Scope	Project Week:	1	2	3	4	5	6	7	8
1	Discovery Phase									
2	Design and Build Phase									
3	Design and Build Phase									
4	Training and Documentation									

Vibe Marketing will:

- Review project tasks, schedules, and resources and make changes or additions, as appropriate. Measure and evaluate progress against the project plan with your project manager
- Review the Vibe Marketing standard invoice format and billing procedure to be used on the project with your project manager
- Work with your project manager to address and resolve deviations from the project plan
- Conduct regularly scheduled project status meetings

- Report time spent on the project to your project manager
- Administer the project change control procedure with your project manager
- Coordinate and manage the technical activities of Vibe Marketing project personnel

## **5.2 Acceptance of Deliverables**

Acceptance criteria for each deliverable (including the final website delivery) will be mutually agreed upon by Vibe Marketing and the client. The acceptance criteria will be based on the signed off designs and the client will have to do acceptance of each deliverable by signing a sign-off document on each phase.

The client should complete the acceptance testing within a stipulated period of 3 days from the date on which Vibe Marketing submits the website for acceptance testing. Any defects identified during this period should be indicated in writing to Vibe Marketing. On successful closing of these defects by Vibe Marketing, the website would be considered to have been accepted by the client.

## **5.3 Change Management Process**

Vibe Marketing will analyze the impact of requested changes on the project schedule and the effort to be expended by Vibe Marketing. Work on the changes would be taken up on terms, mutually agreed by Vibe Marketing and the client. The client needs to initiate a change request (CR) for any feedback/suggestions, which results in change or addition to the signed off requirements. Apart from changes requested by the client there may be other change requests resulting due to:

- Defects detected necessitating a change.
- Suggestions/Ideas that are results of reviews or brainstorming sessions.
- Changes to the environment for the website project.
- Problems and defects found in the client supplied items.
- Results of internal or external audits.

In case of a change that affects projects cost or schedule, the project manager shall seek approval on the evaluation report (created by the change controller/ project manager) from the client. Vibe Marketing will not carry out any work on a client -initiated CR, until the client approves the change evaluation report and a commercial closure is reached on the same between the client and Vibe Marketing.

## 5.4 Communication Process

The following lists the communication tools used in Vibe Marketing to manage projects:

- Jira - for monitoring project & resource utilization.
- Teamwork - for team coordination
- WebEx – for online meetings
- Mantis - Bug Tracker
- GitLabs - Source code inventory

## 5.5 Pricing

Vibe Marketing is very well capable of delivering all of the services requested. We propose to start the project with a discovery phase at a fixed price of \$1,176 excluding applicable taxes. From the information provided in the RFP document, for the following phases Vibe Marketing estimates the below budget, based on the outcome of the discovery phase these estimates may be adjusted.

Phase	Price
Design and Build Phase	\$5,120
Training and Documentation	\$1,176
<b>Total</b>	\$6,269
Discovery Phase	\$1,176
<b>Grand Total</b>	\$7,472

All our website projects come with our unique “We design until you are satisfied” guarantee as well as free 24/7 support in case of technical issues with the website post go-live. If applicable, this free support also applies to the hosting.

**Table 1 – Rates for Support and Maintenance, SEO and Hosting**

Type of service	Hourly rate in USD	Bundles in USD			
		10 hours	25 hours	50 hours	100 hours
Maintenance and support during office hours*	49	485	1201	2377	4655
Maintenance and support out of office hours	65	644	1593	3153	6175
SEO (Search Engine Optimization) per month, max 10 key phrases, min. 6 months	from 412 per month				
Hosting per year, price varies based on size of the website(s)	from 248 per year				

\* Office hours refers to the Shorewood-Troy Library office hours

Alternatively, for the maintenance and support of the website, we can offer an annual or monthly fee of a percentage of the total website project cost. The percentage depends on the scope of the maintenance and support.

## **5.6 Going Live and Source Code Handover**

The final website will only Go Live respectively once the final completion has been signed off and paid for. The final source code of the website will only be handed over to the customer upon complete payment on the project. Until then the source code remains the intellectual property of Vibe Marketing. Upon complete payment, the source code will be handed over to the customer and will become their intellectual property.

## **5.7 Payment Terms**

Payment for fixed priced products and services will be due in three installments:

1. 50 % before the work starts
2. 25% first proof or half way point
3. remaining balance before Go Live.

Services against hourly rates will be invoiced on a monthly basis with a 30 days payment term. Bundled services and subscriptions will be invoiced and are due before the start of the delivery.

## **Vibe Marketing References**

Name of organization	Nato (ISGS) WWW.ISGS.ORG
Type of organization	International Sol – Gel Society
Country	Brussels, Belgium
Contactperson reference	Name: Aleksandra Lobnik
	Function: President (Prof. Dr.)
	Tel.nr. – prefers to be contacted by MAIL
	E-mail: <a href="mailto:president@isgs.org">president@isgs.org</a>
Period the reference refers to	2015 - today
Brief description of the assignment that Vibe Marketing has carried out.	The organization needed to be provided with website design and mobile application development for an event. We have delivered these successfully and we are still a supplier today.

Name of organization	Complete
Type of organization	Print and stationery business with over 30,000 clients
Country	UK
Contactperson reference	Name: Rachel Madrasi
	Function: Accountmanager
	Tel.nr. – prefers to be contacted by MAIL
	E-mail: rachel@completedigital.co.uk
Period the reference refers to	2019 - today
Brief description of the assignment that Vibe Marketing has carried out.	Complete needed to provide graphic design and digital services to their existing clients. They have partnered with Vibe Marketing to produce all of these items. We work as white label partner, they deal with their clients and we provide all design and digital work. They are a very big company and have 30,000 clients. This partnership has started in 2019 and is going extremely well.

Name of organization	Apptology
Type of organization	App Development Company
Country	USA
Contactperson reference	Name: GARY DALAL
	Function: Owner
	Tel.nr. +918800454545
	E-mail:gary@dalal.in
Period the reference refers to	2015 - today
Brief description of the assignment that Vibe Marketing has carried out.	Vibe Marketing's job was to create branding, develop their website and create design work as they needed it. We delivered on all of these and we still work with them until today.



Please read here more references from customers on our website:

<https://www.vibemarketing.nl/references/>



# Shorewood-Troy Library

Website Proposal, Presented by Ron Johnson



# Overview

Shorewood-Troy Library is an awesome library that needs a website to function as a powerful marketing and communications tool to educate patrons, be very easy to use, and provide credibility.

Shorewood-Troy Library would like Ron and CyberOptik to design/develop a new website because they have a [proven track record of success](#).

## References:

Melissa Bradley <mbradley@fountaindale.lib.il.us>

Mallory Hewlett <mhewlett@jolietlibrary.org>

Dorothy Koll <dkoll@acornlibrary.org>

CyberOptik has worked with ~12 libraries to fix up their existing websites and/or launch new websites, including the three above. Libraries have become one of our niches that we're able to service very well. We've been around since 2002 and have since grown to a team of 20. We provide full website, digital marketing, and hosting/care solutions to our over 300 clients. We have a strong focus on the user experience, making sure that all of our websites are very easy for a user to find exactly what they are looking for on any device.

# The Optik Method

## Why The Optik Method?

The Optik Method has evolved over the 20 years we've been building and hosting websites to help us craft the most effective websites and enjoyable experiences for our clients.



### Beautiful Design

We will create a pixel-perfect design that compliments your branding and draws the eye of your target market.



### Built To Perform

Your website is designed to be user-friendly, and help users find what they're looking for while actively guiding them to get in touch, driving you more org.



### Easy Management

We design the backend of the website so you can easily make day-to-day edits to the website.



### Security

Our method of building websites is always security-conscious, using premium or in-house plugins that are consistently maintained. Our hosting takes it even further.



### Fast & Scalable

Your website is optimized for speed to help it quickly load for users, easily grow over time, as well as give you a boost in search engines.



### Reliability

Everything we build goes through our extensive quality assurance checklist to make sure your project is a success.



### Support

Our expert support team is always here to answer questions, guide you on making changes to your site, and handle change requests.

## What Is The Optik Method?



### 1. Review

Let's take a look at where you are right now and where you'd like to be.



### 2. Strategy & Planning

We map out the best game plan to get you there and break it into clear, actionable steps.



### 3. Design

Our designers will craft a beautiful, user-friendly, and effective design. Provide as little or as much feedback as you'd like.



### 4. Development

We craft your design into a fully functional demo that you can test, share, and *try* to break.



### 5. Refinement & Launch

We look for any revisions you have and make sure everything is properly handled on the site. The website then goes through our 45-point quality assurance check before going live.



### 6. Support & Proactive Care

We're always here to make sure your website is correctly cared for, and any time you have a question or request, our experts are ready.



### 7. Promotion

When you'd like to actively drive more traffic to your website, we have a range of offerings to help promote your website.

# Org & Target Market Needs

## Org Needs

Specifically, the new website needs to fulfill the following org needs:

1. Be easily editable in-house to avoid needing to pay for all future page edits/updates
2. Educate both visitors & clients about Shorewood-Troy Library, what you offer, and how to utilize you
3. Have an up-to-date marketing tool that works flawlessly across all devices
4. Be search engine friendly to help boost search engine rankings and increase search engine traffic
5. Attract new prospects to help build your email database (optional)

## Target Market Needs

The new website needs to assist the target audience do the following:

1. Easily navigate the site and find exactly what they're looking for, including what services you offer
2. Get most of their questions answered, so they're ready to go once they get in touch
3. Easily connect with you, whether through a contact form or by calling you

Ultimately, the Shorewood-Troy Library website should be a valuable resource for existing and potential patrons/partners.

# Solution

**We'll be developing a completely new website, built from the ground up, with a customized design to convey the value that Shorewood-Troy Library adds to its offerings.**

The new website will be designed to:

- Increase your brand recognition by increasing the search engine friendliness of your website
- Reduce time and cost spent on administration and editing the website
- Make you feel CONFIDENT and proud of your website
- Integrate into social media to expand the reach of your content (optional)
- Track all of the traffic on the website, to see where your visitors are coming from and how they are using your website

Additionally, the following “behind the scenes” features will be built into the website:

- Regular pings to Google, Yahoo, and Bing
- High-speed page loading
- Anti-spam features on contact forms and blog posts
- Comprehensive video tutorials for the content management system

Specific Deliverables:

- Development of information into sitemap ([sitemap](#))
- Design user experience and user interface
- Develop working HTML/CSS website to best practice web standards
- Develop responsive breakpoints for tablet and mobile experience
- Development of interactive prototype to finalize functionality and any third-party integrations
- Integrate website into WordPress content management system
- Integrate Search Engine Optimization best practices to increase visibility in popular search engines such as Google and Bing
- Integrate WCAG 2.1 / Level AA guidelines
- Test and debug beta version of the website before launch
- Launch website
- Integrate Google Analytics software
- 1-Hour live training session after launch (recorded, timestamped, & a digital copy provided)

- Other items from the RFP:
  - Usability Test results
  - Original, editable graphical asset files as needed
  - Staging environments during the build phase
  - Robust testing and QA up to and through launch
  - Integration with library catalog/database, calendar, and chat widget
  - Ability to display content in the following formats: .jpg, .pdf, .png, .Mp3, and mp4 video
  - Staff logins & authentication (mfa, session timeouts)
  - Custom forms & information submission
  - Hosting (bot protection, website firewall, backups, handle CMS add-ons, US datacenter)

# Project Timeline

We offer the following timeline for the design of the Shorewood-Troy Library website.

**Please Note:** The Design & Development phase does not start until all assets are received. This includes a high-resolution logo, sitemap, and all text/photo content. We'll provide an estimated delivery date for a complete demo at the start of phase 2.

## **Phase 1:**

### Discovery (2 Weeks)

Development of a sitemap and organizing of all content.

## **Phase 2:**

### Design & Development (12 Weeks)

Design/development of a fully functional version of the website user experience and user interface to allow the target audience to navigate and use the website to achieve their needs easily.

## **Phase 3:**

### Revisions, Testing, & Optimization (3 to 4 Weeks)

After we deliver the site for your review, you'll have an opportunity to provide up to two rounds of feedback to perfect the site.

## **Phase 4:**

### QA & Launch (3 Days)

Once we have your stamp of approval, we'll do our final quality assurance review and get the site launched.



# Payment Schedule

**50%** in advance

**30%** after 14 weeks

**20%** upon final project approval or 18 weeks\*

\* = whichever comes first

Please note: after your deposit invoice is received, the 2nd and 3rd invoices will be scheduled based on the above timeline.

# Investment

## Project Essentials

### Full Website Solution

\$8,600

Our full solution to get you up and running with a beautiful and user-friendly website.

### ADA Compliance Items

We'll handle all of the ADA Compliance items mapped out in our agreement to follow WCAG 2.1 / Level AA guidelines.

## Hosting & Care

### Managed WordPress Hosting + Care Plan

\$60 /month

For the hosting of the website, we recommend that you be on one of our website care plans so that we can keep the website running smoothly for you. Hosting is billed in terms of 6 or 12 months.

- Extra fast and optimized
- We handle all of your software updates, security monitoring, uptime monitoring
- Much more

### Managed WordPress Hosting + Care Plan

\$100 /month

Same as the above package, with an included 30 minutes per month for any requested website changes, as well as a yearly full website review, and priority support.

## Additional Options

### Ecommerce Functionality

\$2,000

OPTIONAL

The ecommerce portion of the website for the friends of the Library.

### Custom Design

\$2,000

OPTIONAL

With this option, we will custom design your website from scratch, instead of using one of our premade layouts. You will get a great

quality website either way, and most of our clients do \*not\* opt for this option. This is best for companies that have a very specific vision they're looking to accomplish. This will also extend the project timeline ~4 weeks.

---

Privacy & Terms of Use Policies

\$99 /year

OPTIONAL

Every website should have the proper policies to cover your org, in case something were to happen. We're an agency partner of Termageddon, a service that generates custom policies based on your org. Free setup if added before your website goes live, otherwise \$100 setup.

---

**One-off Total \$8,600**

# Frequently Asked Questions

What happens if I want to add new features to the website while you're building it?

While we like to be flexible and responsive to your needs, we also want to deliver what we promise within the time frames and budgets we have allowed. We can add new features, but depending on the complexity, they may be quoted separately.

What if I don't like the website design?

For custom websites, we'll spend quite a bit of time designing website mockups that you will be able to provide input on. We include several rounds of revisions and will guide you using our many years of experience + best practices.

For semi-custom websites, the layout you've chosen will set the overall tone of your website, and we customize it to make it your own.

Can I change my mind about the design?

After you approve any website mockups, we do not go back to rework them. We can revisit mockups that had already been approved; however, any 'reworking' of mockups would be billed separately from your project. This is why we spend a while on the design phase because it's easier to change things then.

Who writes the content for my website? How will I know what to write?

That's a really good question. Unless you'd like us to handle the writing for you (at an extra cost), we'll look to you for the text to use on your website.

When we start your project, we'll map out all of the pages into a sitemap. We can then review what content you already have and map out what is still needed. We will also advise you as to what content we think you should have on the website.

Where is the website hosted?

Your website can be hosted with [CyberOptik](#), or you can choose a third-party host such as Flywheel or WP Engine.

*Please note that we do not suggest low-end hosting such as GoDaddy, Ionos, BlueHost, Yahoo, etc. While there are 'perceived' cost savings, the cons outweigh this. We're serious about this and do not support these providers.*

## What is a sitemap?

A sitemap is an outline of all the different pages your website will have and how all the various pages of a website are related.

## What is a demo website?

A demo website is a fully functional version of your website that uses the design selected and has all of your content added. Once we deliver the demo website, you can provide two rounds of feedback to finalize any small items.

## Does my website need any disclosures, privacy policies, or terms of service?

We highly recommend your website include a Privacy Policy and Terms of Use. We offer these policies for \$99/yr through our partner company Termageddon. If you purchase through us, we will handle the setup for free. If you wish to purchase directly through them, go for it, but the setup by us would be billed separately.

**These policies are important.** If you do not choose to get these policies with us, you understand that we are not liable for any issues that pop up.

## Why do you use WordPress?

WordPress is open source content management software and currently powers around 40% of all websites on the Internet. The project is contributed to by tens of thousands of developers all over the world and is growing.

WordPress allows us to develop flexible and customizable websites to modern standards and observes web development best practices. Furthermore, the community of web developers that use WordPress reaches far and wide. It allows us to tap into this collective intelligence and bring that wealth of experience to your project.

## Who do I call if something goes wrong with the website or I can't figure something out?

Provided you subscribe to one of our ongoing website care plans, we will be your first point of call should something go wrong with your website. We will determine whether it is something the hosting company needs to fix or something that is covered by your website care plan. We will also provide training and video tutorials to assist you in using your website once it is launched.

All of our support is handled at our helpdesk at [help@cyberoptik.net](mailto:help@cyberoptik.net).

What happens after the website is launched? Is there any warranty?

Once your website is launched, we will provide 30 days of support to make sure any bugs have been ironed out. After this, you will need to subscribe to one of our ongoing website care plans to make sure your website is looked after and maintained. These website care plans include updating your software, regular backups, security monitoring, and ensuring your website is online and open for business 24/7/365.

More information on our website care plans can be found [here](#).

How long will it take to appear at the top of Google?

The time it takes for your website to appear on page 1 of Google depends on many factors. Nobody can guarantee how long it will take for your website to appear at the top of search engine results pages (including people who work for Google); however, several factors can improve your chances.

Building your website on WordPress is a good start as it has some excellent Search Engine Optimization fundamentals built-in. Creating unique and interesting content regularly for your website is also critical to increasing your visibility amongst search engines. Launching your website and then forgetting about it is a surefire way to get lost amongst the noise.

We are happy to talk to you more about your search engine strategy if we haven't already.

How will I know if anyone is visiting my website?

We will install Google Analytics on your new website, which will allow you to see a wide range of statistics about your website, including the number of visits, page views, the amount of time people are spending on your website, and more.

# Next Steps

## **To take advantage of this proposal and proceed with the project as outlined, Shorewood-Troy Library's options are:**

1. Review the proposal and make sure everything is to your liking. If you would like any changes, contact Ron.
2. On the 'Investment' page, be sure to select any options you'd like.
3. Please fill out the below form with the details of who we should generate invoices to.

**Billing Information Form:** <https://forms.gle/aP7iuFuUqYFWtt8Y8>

4. When all looks good and you've reviewed our mutual agreement, accept the proposal by typing your name in the digital signature box below.
5. We'll then generate an invoice for the deposit payment. This invoice can be paid via credit card, check, or Zelle.

Once the invoice is paid, Congratulations on getting your new website started! CyberOptik will then follow up to begin the first stage of the project.

Please be aware that the payment schedule outlined will be set once we begin the project. If you opt to pay by credit card, we will auto-charge these payments when they are due. Otherwise, you will need to make sure the payments get taken care of on time.

We're happy to make changes to the project scope on Shorewood-Troy Library's request at any time, but this may be subject to additional billing.

# Mutual Agreement

## Summary

We will always do our best to fulfill your needs and meet your goals, but sometimes it's best to have a few things written down so that we both know what's what, who should do what, and what happens if stuff goes wrong. In this contract, you won't find complicated legal terms or long passages of unreadable text. We have no desire to trick you into signing something that you might later regret. We do want what's best for the safety of both parties, now and in the future.

## In Short

You (Shorewood-Troy Library) are hiring us (CyberOptik Web Development LLC) to design and develop a website for the estimated total price as outlined in our proposal. Of course, it's a little more complicated, but we'll get to that.

## What Do Both Parties Agree To Do?

As our customer, you have the power and ability to enter into this contract on behalf of your company or organization. You agree to provide us with everything that we'll need to complete the project – including text, images, and other information – as and when we need it and in the format we ask for. You agree to review our work, provide feedback and approval in a timely manner too. Deadlines work two ways and you'll also be bound by any dates that we set together. You also agree to stick to the payment schedule set out at the end of our proposal.

We have the experience and ability to perform the services you need from us and we will carry them out in a professional and timely manner. Along the way, we will endeavor to meet all the deadlines set but we can't be responsible for a missed launch date or a deadline if you have been late in supplying materials or have not approved or signed off our work on time at any stage. On top of this, we'll also maintain the confidentiality of any information that you give us.

## Getting Down to the Nitty Gritty

### Communication

#### **Email**



The majority of our communication will be done via email with your project manager. Emails are generally responded to within 24 hours, Monday through Thursday.

## **Meetings**

No in-person meetings are included with the project. Virtual meetings can be scheduled with your project manager from the start of your project to when your website is launched. Virtual meeting times are available (first come, first serve) from 12pm–5pm, Monday–Thursday. Virtual meetings can only be scheduled at least one business day ahead of the desired meeting time.

## **Approvals**

During the project, there are times where we will need your approval on a phase before we move forward. These approvals should be provided in writing via email.

## **Project Updates**

Upon request, we will provide a written update on our progress no more than once per two weeks during production.

No demos, examples, or screenshots will be provided during production until the full demo is complete.

## **Content**

### **Text**

We're not responsible for writing any text copy unless you select it within your proposal options. We're happy to provide a quote for any copywriting work as it arises.

All text content will need to be provided in a digital format (Word or Google document); either a single document with all content or a separate document for each page.

### **Media**

You will supply us with photographs in digital format. These must be provided in an organized manner, either in folders or using file names, so we can understand where they should be used.

We can find example stock photos for you to use, however, we will not spend large amounts of time locating photos -- we can provide you with access to search for photos that you like.

Unlimited photos are included from [pexels.com](https://www.pexels.com). Up to 10 photos are included from [depositphotos.com](https://depositphotos.com) and must be used during the project itself.

Unlimited icons can be sourced from [flaticon.com](https://flaticon.com) and [fontawesome.com](https://fontawesome.com).

Please note that these types of media are not included: videos, photos/icons from any other source than listed above, and custom illustrations/icons.

Modification of illustrations, icons, photos, or videos is also not included unless selected on the Investment page.

## Mockups

### **Standard Websites**

If we're using one of our premade layouts, you are allowed one design based on the layout chosen. No mockups are included. We'll take your chosen layout and customizing it to your branding, content, and pages, but will not make any major design edits.

### **Custom Websites**

If we are custom designing your project, and not starting from a premade layout, we'll create mockups for the look-and-feel, layout, and functionality of your website. Please note that mockups are meant as a blueprint of your site but are not an exact replica and are only images, there is no functionality in mockups.

This contract includes two main designs plus the opportunity for you to make up to two rounds of revisions. If you're not happy with the designs at this stage, you will pay us in full for all of the work that we have produced until that point and you may either cancel this contract or continue to commission us to make further design revisions at our standard design rates.

After the homepage mockup is approved, the overall color scheme, fonts/styles, header and footer layout, and primary navigation are finalized.

Two subpage mockups are also included. All other pages are created during production and we will use the approved homepage and subpage mockups as a reference to how they will look. Any additional mockups requested would be quoted separately.

To help avoid delays during the mockup phase we do not handle revisions relating to updated text content, spelling/grammar, specific icons used, or specific photos/illustrations used. These changes are implemented once we create your demo website.

## HTML and CSS Layout Templates

If the project includes HTML markup and CSS templates, we'll develop these using valid HTML and CSS code. The landscape of web browsers and devices changes regularly and our approach is to look forward, not back. With that in mind, we will test all our markup and CSS in current versions of all major desktop browsers to ensure that we make the most from them. Users of older

or less capable browsers or devices will experience a design that is appropriate to the capabilities of their software. We will also test that these templates perform well on Apple's iPad.

We will not test old or abandoned browsers, for example, Microsoft Internet Explorer 11 and older for Windows or Mac, previous versions of Apple's Safari, Mozilla Firefox, or Opera unless otherwise specified. If you need us to consider these older browsers, we will charge you at our standard rate for any necessary additional design work, development, and testing.

## Revisions

After we deliver a full demo of the website to you, you will be provided with two rounds of revisions. All revisions must be provided in a single list within a Word or Google document. Any requests after the two rounds are quoted/billed separately.

Revisions can include changes to the text, formatting of content, swapping out of photos/illustrations/icons, and minor modifications to the theme or colors.

Revisions do not include major modifications to any theme/layout elements that were established/approved before the project. This includes the mockups for custom design projects and the selected premade layout for standard projects. It also does not include new content, pages, features, or any major revisions to the sitemap.

If you chose a custom design, the design/layout of the website will be established during the mockup phase. If you chose a semi-custom design, the design/layout will be established by the layout you chose.

If you do want to change your mind, add extra pages or templates, or even add new functionality, that won't be a problem. However, you will be charged accordingly, and these additional costs will need to be agreed to before the extra work commences. This additional work will affect deadlines, and they will be moved accordingly.

We'll be upfront about all of this if and when it happens to make sure we're all on the same page before proceeding. We may also ask you to put requests in writing so we can keep track of changes. If the nature or functions of the project change significantly throughout the process, we reserve the right to deem the current project canceled. At this point, you will pay us in full for all the work we have done and may commission us to complete the new project based on the new requirements. This will require a new quote and contract.

## Timeline

As the work we do is custom, delivery dates are estimates and are subject to

change. Some things that can extend the timeline include:

- Delays in response from you of more than two business days to requests or questions
- Unforeseen complications with third-party plugins or custom development
- Unscheduled team member absences
- Power outages and natural disasters
- Additional requests or new features added to the project scope

We will do our best to keep you informed of any delays that do occur.

## Linking Back

We think it is only fair to give credit where credit is due, so CyberOptik will include a little link back to our website in the footer of your website. If you would prefer a link not to be included, we will simply add 10% of the project cost to the final payment.

## Technical Support

If you are hosting the website with a third party, we will allocate up to one hour to transfer your website to their hosting. If it takes longer than this you will be billed a one-time fee of \$100.

We do not offer or include technical support for website hosting other than our own, support for email, or other third-party services. We do not work with GoDaddy, HostGator, or Bluehost web hosting.

## Accessibility

Unless you select our Extra ADA Compliance add-on, we will not build a website that is considered ADA compliant. If this option is selected, we will develop the website to be compliant to WCAG 2.1 / Level AA.

A perfectly compliant website is not feasible as websites are always changing, so we will also include an accessibility statement/complaint form, to allow individuals to report issues they have.

If any accessibility issues pop up within 30 days of the website launching, we will fix them free of charge. After this, any fixes are billed hourly.

## Legal stuff

We can't guarantee that the functions contained in any web page templates or in a completed website will always be error-free and so we can't be liable to you or any third party for damages, including lost profits, lost savings or other incidental, consequential or special damages arising out of the operation of or inability to operate this website and any other web pages, even if you have advised us of the

possibilities of such damages.

If any provision of this agreement shall be unlawful, void, or for any reason is unenforceable, then that provision shall be deemed severable from this agreement and shall not affect the validity and enforceability of any remaining provisions.

Phew!

## Copyrights

You guarantee to us that any elements of text, graphics, photos, designs, trademarks, or other artwork that you provide us for inclusion in the website are either owned by your good selves or that you have permission to use them.

When we receive your final payment, copyright is automatically assigned as follows:

You own the graphics and other visual elements that we create for you for this project. We'll give you a copy of all files and you should store them really safely as we are not required to keep them or provide any native source files we used to make them.

You also own text content, photographs, and other data you provided unless someone else owns them. We own the markup, CSS, and other code. We license it to you for use on only this project. We love to show off our work and share what we have learned with other people, so we reserve the right to display and link to your completed project as part of our portfolio and to write about the project on websites, blog articles, and books about web design.

## Payments

We are sure you understand how important it is as a small business that you pay the invoices that we send you promptly. As we're also sure you'll want to stay friends, you agree to stick tight to the payment schedule outlined in our proposal.

If invoices are not paid within the payment schedule we have agreed upon; we are under no obligation to keep the site on our testing server or continue with the project in any way.

## But where's all the horrible small print?

Just like a parking ticket, you can't transfer this contract to anyone else without our permission. This contract stays in place and need not be renewed. If for some reason one part of this contract becomes invalid or unenforceable, the remaining parts of it remain in place. Although the language is simple, the intentions are serious, and this contract is a legal

document under exclusive jurisdiction of the courts of DuPage County, Illinois.

Authorizing this project requires a signature on the previous page, 'Next Steps.'



**Dorothy Koll**

Mon, Oct 30, 1:41 PM (7 days ago)

to me

Hi Jennie,  
I'd be happy to answer these questions.

1) In general, are you happy with the website that CyberOptik designed for your library?

Yes, I am happy with our website. It's easy to maintain, looks nice, and is easy to navigate.

2) Was CyberOptik responsive to design or other concerns that you or your management team had during the design process?

The design process was pretty seamless. It was spring 2020, so there were a few challenges with timing, but all in all it was an easy process.

3) Did the design and build of the website stay roughly on schedule?

Yes, it was on schedule.

4) Has CyberOptik support been helpful and responsive once the website was designed and built?

Yes, they respond to the help tickets the same day, even in the evening.

5) Have you experienced significant downtime with the website?

We have experienced no downtime in 4.5 years.

6) Have you experienced any problems with the hosting of the site?

None

7) Is your site mobile-friendly and ADA-accessible?

It is mobile friendly, it is not ADA accessible. That is a project we are looking to tackle in the next year.

8) Do you have any other feedback that you would like to share?

I've been very pleased with Cyber Optik. No complaints.

Thanks, have a good Monday!

Dorothy Koll | Library Director  
Pronouns: she, her, hers  
Acorn Public Library District  
15624 S. Central Ave.  
Oak Forest, IL 60452  
708-687-3700





**Mallory Hewlett**

Mon, Oct 30, 12:21 PM (7 days ago)

to me, Melissa

Hi Jennie,

Below is the feedback, thanks!

**1) In general, are you happy with the website that CyberOptik designed for your library?**

Yes, we are happy with the design and functionality of the website.

**2) Was CyberOptik responsive to design or other concerns that you or your management team had during the design process?**

Yes. Sometimes, I feel like there were some communication barriers, because things were mostly done via email, but overall, they fixed any concerns.

**3) Did the design and build of the website stay roughly on schedule?**

A few of the deadlines were pushed back. I would say we went live about 2 weeks after we planned on getting there.

**4) Has CyberOptik support been helpful and responsive once the website was designed and built?**

Yes, I have no complaints. I did have a few things to follow up on them with and they helped out quickly.

**5) Have you experienced significant downtime with the website?**

No.

**6) Have you experienced any problems with the hosting of the site?**

No.

**7) Is your site mobile-friendly and ADA-accessible?**

Mobile-friendly, yes. They did install an ADA widget for things they could not be 100% ADA compliant, be it colors or font sizes. We have a gold color in our color scheme that can be tricky.

**8) Do you have any other feedback that you would like to share?**

I kept the process and feedback to a very tight circle of staff. I believe that process made things go smoother. A lot of my interaction was through email and online, we never met in person. That was fine and worked well with me, but some others may not like that. I was flexible with dates and deadlines on their end, but I had to make sure our changes were on time. We also provided all the content. I'm happy with the website and the CyberOptik team, and the price was affordable for us. I also think WordPress is very easy to deal with. The training was about an hour via zoom. I refer to it from time to time! I haven't had any complaints from patrons or staff.

Good luck!

Mallory

--

Mallory Hewlett (she/her)  
Communications Manager  
Joliet Public Library  
150 N. Ottawa St  
Joliet, IL 60432  
Office: 815-846-3124  
[mhewlett@jolietlibrary.org](mailto:mhewlett@jolietlibrary.org)





Website Design & Development

## **Shorewood-Troy Library**

Submitted October 26, 2023

**Submitted by:**

Sean Fitzpatrick  
442 Charles Ave SE  
Grand Rapids, MI 49503  
proofstudio.co  
sean@proofstudio.co  
940-594-8538



442 Charles Ave SE • Grand Rapids, MI • 49503 • 940-594-8538 • [sean@proofstudio.co](mailto:sean@proofstudio.co)

October 26, 2023

TO:

Jennie Mills  
Library Director  
Shorwood-Troy Library  
[jmills@shorewoodtroylibrary.org](mailto:jmills@shorewoodtroylibrary.org)

**Solicitation Name:** Request for  
Proposal for Website Redesign for the  
Shorewood-Troy Library

**Closing Date and Time:** October 26,  
2023 at 3pm Central Time.

This proposal is valid for 90 days  
and the staff proposed are available  
immediately to work on this project.

Dear Ms. Mills,

We were excited to learn more about your library and your website redesign project through reviewing the RFP you recently issued. We're Proof Studio, and we've been working primarily with select public library clients for about twelve years.

We're a small team with decades of combined experience in visual design for the web and print, branding, information organization, user experience research, CMS development, accessibility, and agile project management. I, Sean, will be your primary point of contact, and I also handle most of the development, some design, and day-to-day project management. We'll pull from expertise from others on our team for help with design, usability testing, and content strategy. Learn more about us [proofstudio.co/about](https://proofstudio.co/about).

We feel our long-term dedication to professional services and consulting for public libraries, education, and literacy organizations puts us in a good position to understand the challenges, nuances, and opportunities for this type of project. With our small team's breadth of experience you'll get the right sort of expertise in a nimble and highly personal working relationship. We'd love to call the Shorewood-Troy Library our client.

Sincerely,

Sean Fitzpatrick  
Owner, Proof Studio

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# I. Executive Summary

## Introduction

We're a small team that designs and builds websites for public libraries, education and literacy organizations, member-based groups, and similar institutions. We partner with clients who, like us, are invested in solving problems and designing better experiences for their audiences, constituents, and stakeholders.

At our core, we're information professionals who tirelessly dream up ways to make nonprofit websites better. We have decades of combined experience in visual design for the web and print, branding, information organization, user experience research, CMS development, accessibility, and agile project management.

## Project Goals

After reviewing your proposal and auditing your current website, we feel you have a good opportunity to update and refresh your current look and feel and improve how you present your materials, resources, and other offerings to your community. For example, your homepage and many interior section landing pages serve as links out to third-party services such as the catalog, Communico, and so forth. We'd like to look for opportunities to move richer content onto those pages themselves, for example via book cover widgets for catalog discovery and events listing widgets to promote programming.

From a visual design perspective, we see a lot of opportunity to maintain some aspects of your current aesthetic but also elevate your visual design as a whole. These visual improvements would impact the entire range of modern devices, including phones, tablets, and laptop/desktop screens.

## II. Technical Solution

We love our clients, and we like to think that working with us is fun, easy, and, most of all, highly productive. We're a small team of experts who work directly with you and your stakeholders to deliver the best products we can.

At our core, we're information professionals who tirelessly dream up ways to make nonprofit websites better — then figure out how to do it in a high-quality, cost-effective way. We believe our success comes from looking beyond the nonprofit world for inspiration. We geek out on good web design, and admittedly, we're usability snobs. The details matter to us.

We have decades of combined experience in visual design for the web and print, branding, information organization, user experience research, CMS development (especially Drupal & Wordpress), accessibility, and agile project management.

### Infrastructure, Utilities and Tools

- We're fully remote and use videoconferencing, screencasting, chat, and cloud project management tools to collaborate with clients everywhere.
- We strive for full transparency with our project management and development so that you and your stakeholders can always see up-to-the-minute progress as we design and build.
- We meet at least weekly with clients, usually over Zoom, during active project phases to check in, discuss work, review priorities, and so forth.
- We like to employ agile project management processes (see "An Agile Approach" below) to deliver maximum value at every phase in the project and allow us to easily pivot if priorities ever change. We shape our work into two-week sprints.

## Project Requirements

The following is based the information requested in your RFP. Based on what we know currently, here's how we would approach your functionality requirements:

- **Meets WCAG 2.1 A and AA conformance standards.** We always strive for ADA accessible design and use third-party and in-browser tools to test and vet. Drupal's code in general meets WCAG 2.0 AA standards, and we vet all of our customizations for those standards as well. In addition, we train content editors for proper accessibility in the content efforts.
- **Optimal UX: Simple, clear access to the library's catalog.** We recommend a prominent search form on every page that enables users to toggle among website search, a simplified keyword-based catalog search. Related, we also recommend a prominent link to the ILS patron login/account page for the various services found there (e.g., access to holds, checked-out items, etc.). See various examples

of our approach to this sort of catalog integration on our library website examples listed below.

- **Optimal UX: Event calendar.** We recommend closer integration of events from Communico into the future Wordpress site by using Communico's widgets to display events lists on the Wordpress homepage and likely other interior pages throughout (various audience-based pages in the Just for You section, for example). Additionally, we could help leverage the future site design into Communico itself by customizing Communico's header, footer, and global styling. See LVDL.org, Urbanafreelibrary.org, and Clearviewlibrary.org for examples.
- **Optimal UX: room reservation pages.** We feel your current

approach to room reservation pages—describing the rooms and associated policies, and then linking to the reservation workflow—is a great start. Perhaps a slightly more visual experience with images and maybe videos of the rooms could help. Also we'd likely recommend moving the calls to action (the reservation buttons themselves) to closer proximity to the room information/images to help better direct traffic to the reservation workflow.

- **Optimal UX: patron accounts.** See "Simple, clear access to the library's catalog" above.
- **Optimal UX: custom forms.** We recommend using native Wordpress form capabilities. Our preference is Gravity Forms, but there are others we could explore based on your specific needs. Native forms, where website users never leave your site and can submit information in an on-page context, provide a more seamless user experience. This is also an ideal user experience for library staff

because form submissions are managed within Wordpress itself, rather than a third-party platform.

- **Content that can easily be maintained and updated by a minimal number of in-house library staff.** We recommend Wordpress and customized user roles and permissions for easy content management.
- **Uses WordPress as the platform.** We have sufficient experience with Wordpress to execute our recommendations here in a Wordpress environment. That said, we should point out that most of our library website experience over the years in with Drupal, a similar CMS that we tend to prefer for libraries. We'd love to talk a bit about Drupal if you're curious!
- **Mobile responsive design.** We use a fully responsive and often "mobile-first" design approach for all of our work. We have at least a decade of experience with responsive design and consider this a standard feature of our



projects.

- **eCommerce functionality.** We understand a bit about your needs here from your Oct. 17 addendum, but not enough yet to make a firm recommendation. Based on what we know so far, we think a third-party commerce platform, such as Shopify, may be ideal for its simplicity vs building a fully functioning eCommerce platform within Wordpress. In this case, the Wordpress site would link to the Shopify platform much like the Wordpress site hands users off to Polaris and Communico. If the library needs a more native Wordpress solution, we recommend and support WooCommerce or simpler payment forms with Gravity Forms. All three of these options would integrate with PayPal, which you indicate as your current payment gateway.
- **CMS integration with other current apps.** So far we've described how we'd approach integration with

Polaris, Communico, and potentially Shopify. Below we describe how we recommend integrating with UniqueChat. We hope this provides some insight into how we tend to approach integration in general for a project like this, but if there are other integration needs, we would like to discuss them in an interview or discovery phase.

- **Search Engine Optimization.** We strive to implement basic best practices with respect to SEO, such as page metadata, proper redirection, descriptive headings and URLs, and so forth. We find that SEO best practices are closely related to accessibility and general web standards.
- **Stakeholder interviews.** For a project like this we tend to interview stakeholders as a group in an early Discovery meeting. This meeting tends to be a group of library staff that's larger than your normal website project team so that we get a diversity of voices and input early on in the project. Given the budget

you've stated in your Oct. 17 addendum, we feel traditional individual stakeholder interviews would comprise too big a proportion of your overall budget to justify them here.

- **Timeline Development.** We'll develop a timeline with you and your team in the contract negotiation phase or early discovery phase. See "Example Sprint Schedule" on page 9 below for an example timeline.
- **User research & testing.** **After our design phase,** we put the proposed design and navigation to the test in usability testing on a live, clickable prototype of your site. The usability test gives us some real data to prove the effectiveness of our choices and will guide us in any improvements. During development, internal staff always has access to our up-to-the-minute work and will have ample opportunities built into our schedule for testing the site before we go live.

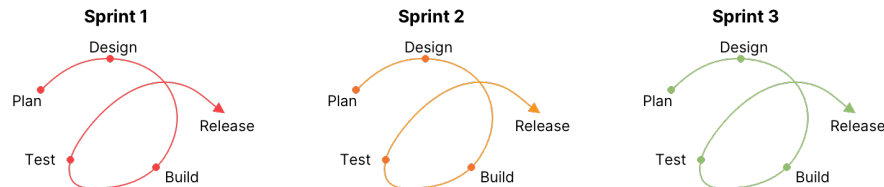
- **Revision cycle as needed.** We'll build in two revision cycles during the design phase. When designs are finalized we'll review and update designs as necessary. Any revisions or changes after designs are finalized may be subject to a written change order when changes require more than 15% of the total budget for the given project phase.
- **User design aligned with search engine optimization best practices.** See "Search Engine Optimization" section above. We find that design and SEO intersect in how we approach structured content and adherence to web standards. For example, structured page headings and subheadings lead to better design and usability as well as better search engine optimization.
- **Alignment with WCAG 2.1 A and AA standards.** See "Meets WCAG 2.1 A and AA conformance standards" above.

- **3rd-party integration: Polaris.** See “Simple, clear access to the library’s catalog” above.
- **3rd-party integration: Communico.** See “Event calendar” above.
- **3rd-party integration: Unique chat widget.** We normally recommend integrating such a chat widget in a global template file or CMS-managed block to be displayed on every page.
- **Display image, audio, and video.** Image, audio, and video display natively in HTML5 and work well out of the box in Wordpress. The rich-text editor (wysiwyg) makes it simple to embed these media assets. Normally we recommend hosting video and audio outside of Wordpress, on YouTube for example, but we can handle native file hosting as well.
- **Staff login & authentication.** Wordpress itself provides login/authentication by default. We can customize roles and permissions for your specific needs.
- **Staff login with MFA.** We recommend the Wordfence security plugin for MFA login as well as for general security all around.
- **Staff login with session timeouts.** By default, WordPress sessions are programmed to expire after 48 hours, or 14 days if you check the Remember Me box.
- **Staff login restricted to IP.** We normally wouldn’t recommend restricting login by IP because many of our clients need to be able to work from home, and typical residential ISPs don’t assign static/permanent IP addresses. Therefore unless staff have a library VPN with a static IP, content managers would be unable to log in until administrators whitelist IP addresses. That said, Wordpress’ Restricted Site Access plugin can provide this functionality.
- **Secure API integration.** We’ll work with library staff to ensure the highest level of security necessary with respect to API integration.
- **Custom forms & information submission.** See “Custom forms” above.
- **Form ability to filter out malicious code/content/ attachments/URLs.** Our recommended plugin, Gravity Forms, provides a high level of security against malicious code in text fields. Although we recommend using file upload fields sparingly, if they are necessary, Gravity Forms provides a layer of security here as well, through restricting file extensions.
- **Require human verification before submission.** We recommend Captcha or ReCaptcha to verify human-based form submissions.
- **Bot protection and DDOS protection. Our recommended host, Pantheon, provides bot and DDOS protection on every site via its global CDN.**
- **Address Web Application Firewall.** Our recommended host, Pantheon, provides a WAF via its global CDN.
- **Provide regular data backups.** Our recommended host, Pantheon, provides daily backups by default, as well as the ability to customize a backup schedule.
- **Verify safety & security of all CMS add-ons.** We vet all plugins for safety and security. We also recommend the WordFence plugin for an extra layer of security, and for clients to whom we provide ongoing hosting, we perform bi-weekly security updates.
- **Hosted in a US datacenter.** Our recommended host, Pantheon, provides a US datacenter.
- **Library holds encryption keys if needed.** We’ll ensure the library holds encryption keys if needed. In general we recommend the library maintain ownership of all accounts related to the site.

## An Agile Approach

We'll never know less than we do today. That'll be true tomorrow and the next day, too.

Forming a general sense of where we're going, doing the highest impact work first, adapting to change, and deferring highly detailed long-term planning takes out a lot of risk and unnecessary re-work. We like to work in small iterations, sometimes called "sprints." We'll share some of our workflow practices with you early on and let you drive prioritization and next steps throughout the entire process to ensure you get the most value out of our partnership.



## Training

We tend to approach training in a somewhat casual way throughout the process of building and handing off your site. You'll get access to the CMS back end early in the development process, and as we demo new features along the way, we'll also train you on how to use the features. We find that breaking training into small sessions throughout our process tends to be more effective than one long session toward the end. We usually use a "train the trainer" model where we train select library staff, who then train others. We can supplement with recorded screencasts for posterity and sharing among staff.

## Timeline

Based on our experience in past projects and our team's resources, we feel a project like this would take around 8 two-week sprints, and we have availability to start as early as mid-July. We're basing the following example timeline on historical data from similar library website projects. In our initial discovery phase (Sprint Zero), we'll nail down a specific sprint schedule for your project.

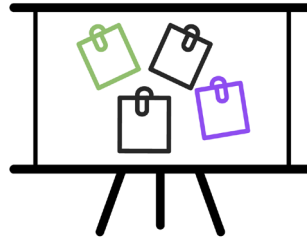
### Example Sprint Schedule

- Sprint 0: Requirements gathering, discovery, project planning.
- Sprint 1: IA & navigation, wireframes
- Sprint 2: High-fidelity design mockups, interactive prototypes, & usability testing
- Sprint 3: Back-end development
- Sprint 4: Back-end development continues; content migration begins
- Sprint 5: Content migration and front-end development
- Sprint 6: Beta testing (one week) and bug fixes (one week)
- Sprint 7: Launch and bug-fix sprint.

# Our Process

## 1. Discovery and Strategy

Our work starts before we even officially kick off. We interview stakeholders and constituents, perform a heuristics-based study on current assets, review website analytics, perform a technical audit of the current site, and so forth. We like to come into a project kick-off meeting prepared to get to work.



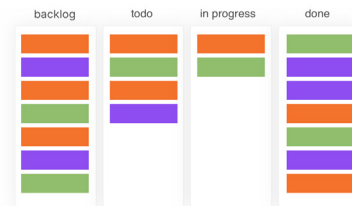
Research doesn't end after this initial phase. We employ various user experience research techniques throughout to ensure we're getting appropriate feedback from representative users through the design and execution phases as well.

## 2. Project Brief & Product Backlog

We use a short Project Brief or simple goals statement as an exercise to center ourselves on high-level objectives and make sure we align with clients and stakeholders.

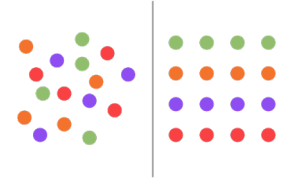
This brief serves as a guidepost throughout the rest of the project.

Here we'll also work with you to prioritize a high-level product backlog to guide the rest of our work.



## 3. Content Strategy

This phase takes our initial Discovery phase into a deeper audit of current content, what we'll migrate automatically to the new site, what we'll rewrite, and what we'll leave behind. The outcomes of this phase are a content manifest (spreadsheet organizing major content pieces), an information architecture, and a navigation scheme.



## 4. Interface Design

Here we'll merge content strategy with existing branding and style considerations to create specific layouts in both low- and high-fidelity comps for a range of device sizes. We approach design in an agile/iterative way, such that together with your input we'll see the compositions take shape in a series of "sprints" or rounds.



The outcome of this phase is a set of clickable prototypes that form the basis for usability testing.

## 5. Usability Testing

Usability testing proves the success or reveals specific failure of our new designs. We use clickable prototypes to model the future site and run representative users through tasks that they should be able to complete.



## 6. Development

Development tends to start early but accelerates after usability testing, the outcomes of which lead to a finalized design. We work in two-week sprints on an open development site, where you can watch our progress and even log into the back end to manage content while we're building.



We work from a prioritized backlog, and you own the prioritization. This gives you a lot of control over the process in a way that doesn't disrupt our work

## 7. Testing & Launch

Working on our suggested host, Pantheon, gives us the advantage of having one-click deployments between development, testing, and production environments. This usually means launching the site is a simple matter of redirecting the domain at the DNS level. We like to work in a way that makes launching new features extremely boring and drama-free from a developer's perspective.



## 8. Post-Launch Support

Just because we launch the site and sign off on the final deliverables doesn't mean we "sign off." We hope that your big site launch is the beginning of a long-term relationship supporting the site, adding new features, and providing ongoing user experience testing, and any general consulting you may need.



## Hosting & Support

As we mention elsewhere, we highly recommend Pantheon for hosting for Drupal. Pantheon is an extremely fast, secure, developer-friendly platform. It comes with developer version control (Git), scheduled backups, dev/test/live environments with "one-click" deployment, and is highly scalable to grow with you. If you choose to use Pantheon for hosting, we will transfer full ownership to you so that you're able to fully manage the account and payment if you choose. Read more about Pantheon here: <https://pantheon.io/product/wordpress-hosting>.

Because we're a very small team, we value ongoing support relationships with our clients. Ideally the website redesign and launch spark the beginning of an ongoing relationship. Support can include security updates, new features, general consulting, and so forth. Scope and cost are according to your needs, but we like to work either in prepaid "buckets" of time or on a monthly contract where unused hours always roll over or accrue.

## Stakeholder Engagement

We prioritize data-driven decision making and user-centered design. To engage stakeholders in the design process, we'll perform in-depth interviews of staff and end users, surveys, analysis of usage analytics on your current site, usability testing on our design prototypes, and constant feedback from your team members throughout.

As we mention elsewhere, we'll train staff on accessibility best practices and perform monthly audits of the site to ensure ongoing compliance with WCAG standards.

# III. Cost & Fee Proposal

## Project Outline & Budget

Please find an outline of services and associated costs. We'll finalize scope and budget in a written scope of work prior to kicking off. Excess time due to changes in scope or extra revisions are subject to a written change order. We ask for a 25% advance to start and bill monthly for time used beyond the hours credited to the advance.

	Cost (CAD)
<b>Discovery &amp; strategy</b>	\$1,200
<b>Information architecture, wireframing, &amp; design</b>	\$2,400
<b>Development</b>	\$4,000
<b>Content management &amp; training</b>	\$1,000
<b>Total Costs for Core Website Design &amp; Development</b>	\$8,600

## Options

<b>Shopify e-commerce implementation consulting</b>	\$2,000
<b>Premium Wordpress plugin licencing</b>	\$1,200
<b>Pantheon Hosting (per year)</b>	\$350
<b>Website support after launch (est. per year)</b>	\$2,400

## Notes:

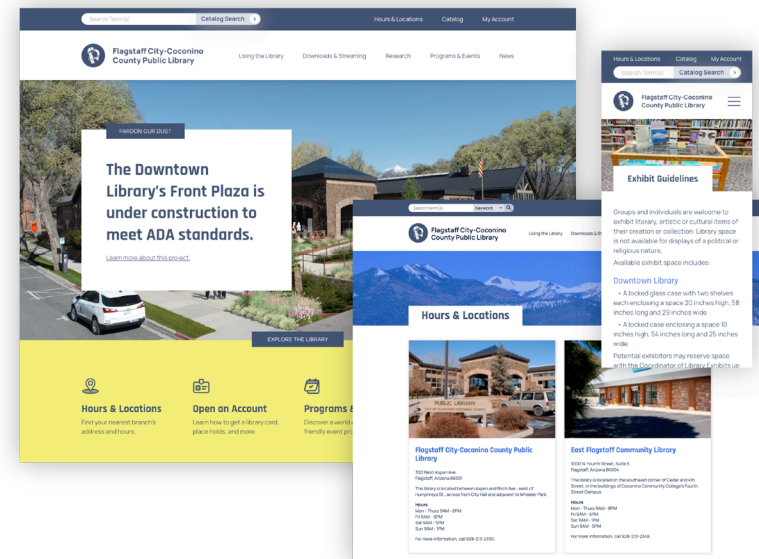
- Hosting and support costs are optional if the library wishes to self-host or work with another vendor.
- Support and general consulting fees in the Options section above are for guidance. Support and consulting after launch is charged hourly at our rate of \$125/hour.



## IV. Experience & References

### Our Work

#### Flagstaff City-Coconino County Public Library



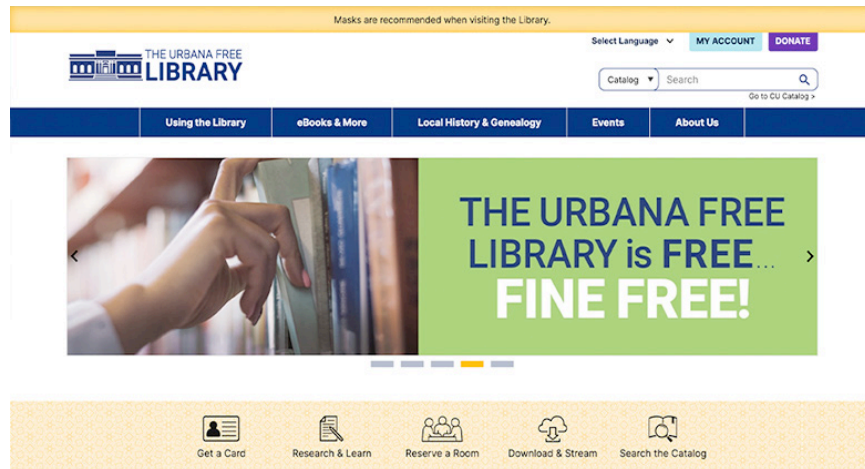
In early 2023, we engaged with the Flagstaff City - Coconino County Public Library to launch a new Drupal CMS-backed website to replace the library's 25-year-old web presence. In doing so, we not only modernized the look and feel of the library's online brand, but also enabled a distributed team of staff to create and update content.

**Reference contact:** Richard Tutwiler, [rtutwiler@flagstaffpubliclibrary.org](mailto:rtutwiler@flagstaffpubliclibrary.org)

**See more at** [flagstaffpubliclibrary.org](http://flagstaffpubliclibrary.org)



## Urbana (Ill.) Free Library

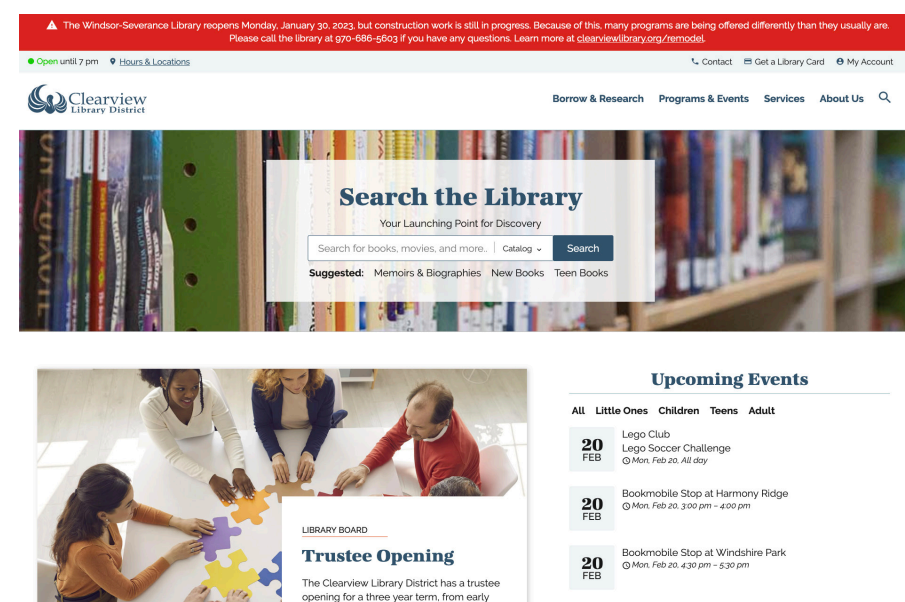


We partnered with the Urbana Free Library in late 2021 to build a custom Drupal platform with powerful drag-and-drop layout tools. A large team of library staff across the organization manage content day-to-day. The site is Drupal 9 and is hosted on Pantheon.

**Reference contact:** Amanda Standerfer, former Director of Communications, [amanda@standerferconsulting.com](mailto:amanda@standerferconsulting.com)

**See more at** [urbanafreelibrary.org](http://urbanafreelibrary.org)

## Clearview District Library (Colo.)



Our work with Clearview includes digital strategy, user experience research, web design, and web development. We collaborated with the library in 2021 to audit their existing public-facing web properties and design an entirely new product, consolidating formerly distributed platforms into a more seamless end-user experience that better showcases the library's high quality services in the northern Colorado region they serve. The Drupal 9 website is hosted on Pantheon.

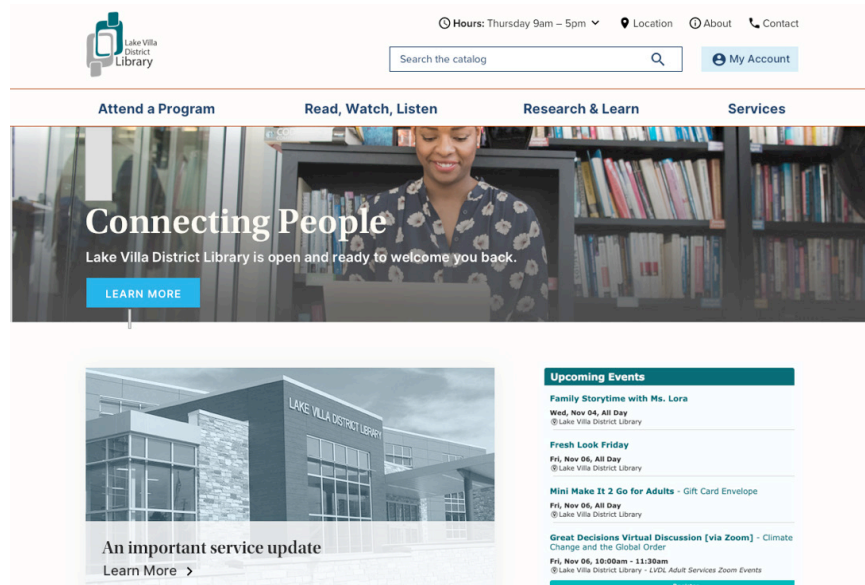
**Reference contact:** Brad Vogler, Digital Communications Coordinator, [brad@clearviewlibrary.org](mailto:brad@clearviewlibrary.org)

**See more at** [clearviewlibrary.org](http://clearviewlibrary.org)





## Lake Villa (Ill.) District Library



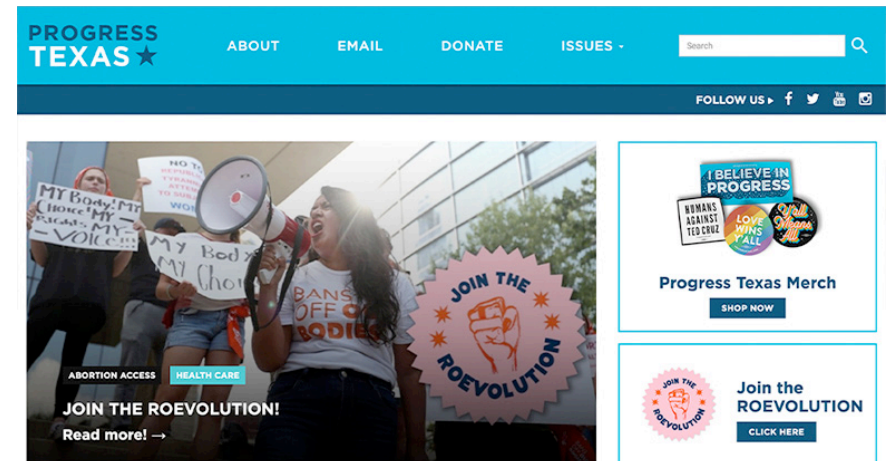
Lake Villa is our oldest continuous client. We've worked with the northern Illinois library system for about twelve years and over three major redesigns. Our work includes web design, development, support, third-party events management integration (Communico), and branding exploration. The Drupal 8 migration (now updated to Drupal 9) launched April 2021 and is hosted on Pantheon.

**Reference contact:** Nina Kenney, Head of Communications, [nina@lvdli.org](mailto:nina@lvdli.org)

**See more at** [lvdli.org](http://lvdli.org).



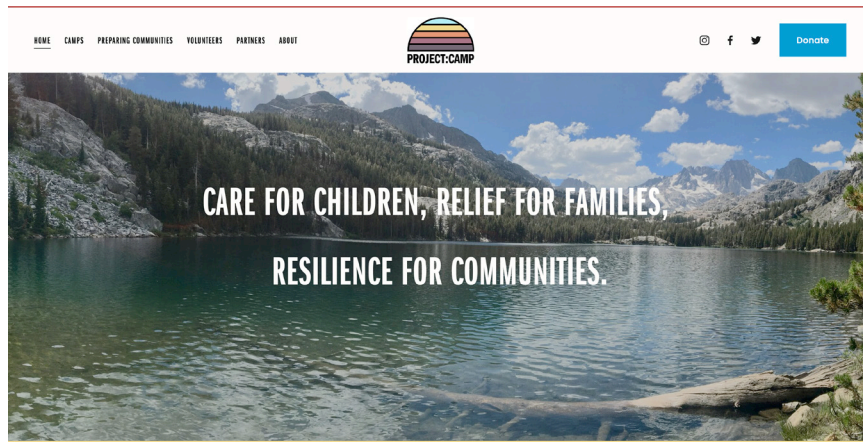
## Progress Texas



Web design, strategy, and Drupal development. See our work at [progresstexas.org](http://progresstexas.org). Our primary goals were to redesign the front-end reading and browsing experience as well as the back-end tooling to make content publication simpler for staff. The site is built on Drupal 9 and is hosted on Pantheon.

**See more at** [progresstexas.org](http://progresstexas.org)

## Project:Camp

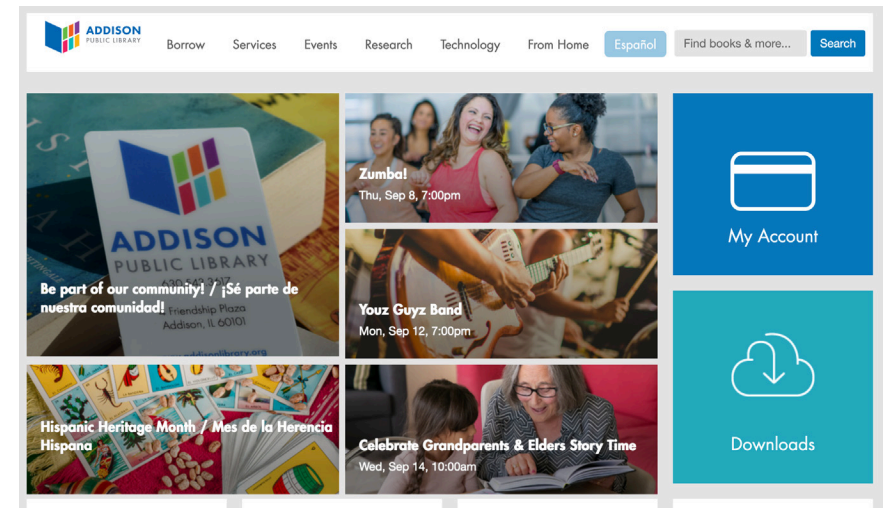


We partner with Project:Camp on their branding, web design, and strategy. Project:Camp is an organization that helps families and communities care for children during and after disasters. Project:Camp deploys with school districts, disaster-aid organizations, and other youth-focused community aid groups. See more at [projectcamp.co](http://projectcamp.co).

Our primary goal for Project:Camp was to quickly prop up a redesigned brand and website for the early-stage start-up at a crucial time with schools, day cares, and non-essential businesses were closing early 2020.

**See more at** [projectcamp.co](http://projectcamp.co).

## Addison (Ill.) Public Library



Designed and built by us in 2014, the Addison (Ill.) Public Library website is still serving the suburban Chicago city's library patrons. The site is fully maintained by library staff.

**See more at** [addisonlibrary.org](http://addisonlibrary.org).

## Testimonials

I've helped five different organizations develop new websites, but none were as great an experience as working with Proof Studio. Sean and his team are responsive, easy to work with, and understand how to work with "non-tech" folks on creating a functional, beautiful site that effectively communicates information to the end user. No detail was too small! We felt listened to and comfortable during the process. Each step was clear and delivered on time if not before. Even after we launched and had several adjustments, Sean took care of them immediately. I highly recommend working with Proof Studio.

—**Amanda Standerfer**, Director of Community Engagement, Urbana Free Library

Working with Proof Studio to redesign our website was a great experience. We wanted a clean, intuitive, flexible design that would allow us to highlight all of our services visually, and we couldn't be happier with the results. Their team was responsive, easy to work with, and has an amazing background that allowed them to guide us through any questions we had along the way.

—**Brad Vogler**, Digital Communications, Clearview Library District

Working with Proof Studio is an absolute pleasure, they really listened to us, and were willing to put in the extra work to develop a visual brand, and build a website that feels deeply customized to who we are and what we stand for.

— **Mikey Latner**, Founder, Project:Camp

Working with Sean on my first website redesign was great! Our site is built on Drupal and, as a non-coder, I couldn't make edits to simple things like text. Not only did Sean update the aesthetic and UX of our site, but he also improved the back end so that I could make edits confidently and without crashing our site. We'll be working with him a lot from now on!

— **Saatvik Ahluwalia**, Digital Strategist, Progress Texas

Proof was important partner to our small team and a great value in our often constrained budget. They were always able to clearly understand the needs of end users and stakeholders and design those needs into attainable technical solutions.

— **Step Aument**, former CTO, ReadyRosie



# V. Organizational Overview & Experience



## Meet the team

### Sean Fitzpatrick, Founder & Project Lead

Sean is a designer, developer, and agile project manager. He partners with public libraries, early-literacy initiatives, ed-tech companies, and membership organizations to solve their challenges with an efficient, practical approach. He has an MLIS from the University of North Texas and teaches web design and development at Dominican University in River Forest, Illinois.

### Jessica Fitzpatrick, Content & Accessibility

Jessica has built a career using information to help underserved people. Starting in public libraries in Michigan and Illinois and supporting initiatives at the American Library Association, Jessica pivoted to web content consulting in 2014 with the goal of making websites better, easier to navigate, and compliant for all users. She has an MLIS from the University of Wisconsin - Milwaukee.

### Andi Harman, Art Director

Andi conceives and executes the conceptual development and design of print and digital graphics related to all client projects. Graphics can include print materials; logos and brand design guides; social media graphics; and website design, development, user experience, user interface, and user journey planning.

### Ozzie Baron, Research Director

Ozzie has led user experience research for dozens of nonprofits, school districts, US Senators, and some of the largest cities and public libraries in the country. Specializing in primary research, Ozzie gets inside the heads of stakeholders and end users to ensure our final product perfectly suits the needs of both audiences.

**Thank You.**

Jennie and Melissa,

1) In general, are you happy with the website that Proof Studio designed for your library?

Yes. Very happy. I've been building websites for almost 20 years now, and have been through a number of projects like this in libraries, and working with Proof Studio was easily the best I've experienced. And for me that means during the process and since we went live, which was two years ago this month.

2) Was Proof Studio responsive to design or other concerns that you or your management team had during the design process?

Very much. We had just finished a branding refresh, and so we let Sean really take the lead on how to incorporate that into the site. I think we would meet every two weeks, and he would bring the new pieces he had worked on to show us so we could give feedback. Working in this way really helped us get to know one another, and I think helped us avoid any big problems late in the project.

3) Did the design and build of the website stay roughly on schedule?

Yes. I don't remember there being any delay. We had a moment later in the project where some of our content wasn't on the site, and this was someone at the library who was behind schedule in putting that together. But Sean and Jessica from Proof Studio added most of that content to keep us on schedule, and they really did not have to do that.

4) Has Proof Studio support been helpful and responsive once the website was designed and built?

Yes. One example, I notice you use Communico for your calendar, room reservations, and scheduling, and we do too. One day I was updating a menu item, and I broke the menu so instead of there being a menu bar in the header, every menu item was a long list down the page. I emailed Sean, and he fixed that in about 10 minutes. He then went and showed me how to fix it. That was the only emergency type of issue that has happened in two years. Most things that come up I post to a Trello board, and then he and I will work through any issues/fixes there. I feel like he usually gets back to me within a day, with an update, questions or a fix.

5) Have you experienced significant downtime with the website?

I don't think we've had any, certainly not anything significant.

6) Have you experienced any problems with the hosting of the site?



No. He recommended we host with Pantheon, it helps him to track things, and to run site updates, and we did do that.

7) Is your site mobile-friendly and ADA-accessible?

Largely yes. I've recently been looking into this more, and I noticed our color palette lacks contrast. I think this was an issue from our rebranding though, and not the web developer. One nice thing is that Sean built in a required alt text field for when we upload images to the site. In some builders it's easy to skip that, and I think it helps that we can't.

8) Do you have any other feedback that you would like to share?

We're still working with Sean and Proof Studio. We're doing a bigger rebranding that should be wrapped up in January. Sean and I have already started talking about what that would look like, and other things we might add to the site during that process. We've worked with him to build an intranet site for the library this past year too.

I'm happy to meet with you both and talk if you like. I can show you the backend of our site, and answer any other questions you might have.

Thanks for reaching out, and good luck with your search.

I hope you're both well,  
Brad

*Brad Vogler*

*Digital Communications Coordinator*

*Clearview Library District*



# Technical Proposal of Services: Website Design and Development

To:

**Jennie Mills, Library Director**  
**Shorewood-Troy Public Library District**  
650 Deerwood Drive  
Shorewood, IL 60404  
[www.shorewoodtroypublibrary.org](http://www.shorewoodtroypublibrary.org)

**815.725.1715**

**Submitted: 10/17/2023**

From:

**Theresa Kuhl, Sales & Digital  
Marketing Manager**  
**Weblinx, Inc.**  
165 Kirkland Circle  
Oswego, IL 60543

**630.551.0334 x111**

[theresa@weblinxinc.com](mailto:theresa@weblinxinc.com)



**CREATIVE  
INNOVATIVE  
RESPONSIVE**



# Cover Letter

To **Shorewood-Troy Public Library District** Staff and Elected Officers:

Weblinx, Incorporated ("Weblinx"), an Illinois Corporation established in 2001, is an established leader in providing web design and digital marketing solutions. Our mission is to create compelling brands for libraries that will offer an immediate connection with the patrons in the Shorewood community. Your website and digital marketing efforts should clearly position your organization as the strategic provider of information, offering a connection between your organizations and the patrons you serve.

We understand what it takes to build a successful digital marketing strategy and impactful websites. The most prominent benefit of working with Weblinx is our knowledge of user experience design. We use leading industry technology to create interactive, professional, and award-winning websites.

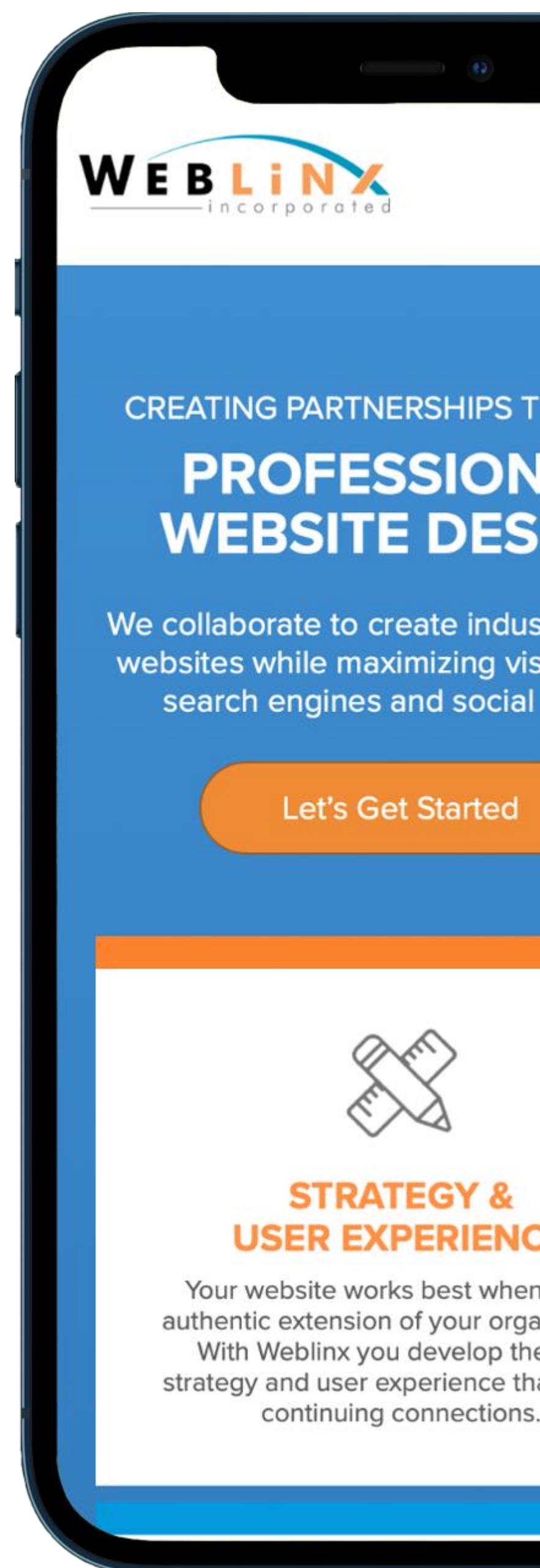
Weblinx has over two decades creating successful and unique digital marketing programs for our public sector organizations. Weblinx will provide a unique perspective of the regional market and service offerings, providing visitors with streamlined information while improving interaction within **Shorewood-Troy Public Library District** and the surrounding community.

We have made hundreds of presentations and worked with individuals, committees, departments, boards, and executive management teams to create a seamless creative process. We have the experience and personnel to work closely with the **Shorewood-Troy Public Library District** staff to organize and execute the requirements of your website redesign project.

Sincerely,



Theresa Kuhl  
Sales and Digital Marketing Manager  
Weblinx, Inc.





# Executive Summary

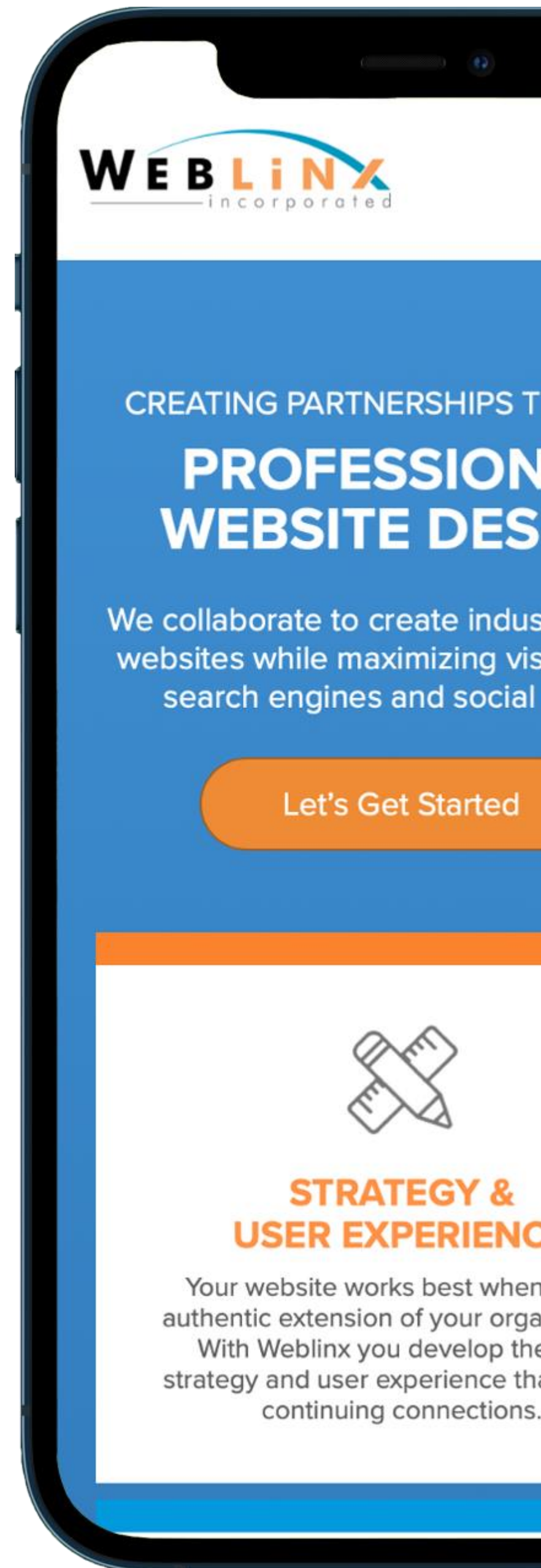
Weblinx understands what it takes to build a successful website. The most prominent benefit of working with Weblinx is our knowledge of how to best use various digital marketing solutions to promote your organization.

Weblinx is an expert in user interface design. We use leading industry technology to create interactive, professional, and award-winning websites. Weblinx works with its clients to create an interactive and collaborative design process. We gather information based on an extensive discovery process, provide design concepts subject to your feedback for revision, discussion and further evaluation.

Our process is tried and true and something we have refined to great success over the years. Proof of our process is the enormous portfolio of work we have accumulated since the company's inception. We are the number one provider of web services to libraries in the northern half of Illinois, and have launched over 60 library websites nationwide.

Weblinx builds mobile-first websites which prioritizes mobile device use first and foremost. This approach will ensure that the key elements of your website are prominently displayed for anyone using those screens.

We use HTML5 coding practices and all of our websites are built to comply with Section 508 and WCAG 2.1 Level AA accessibility compliance standards. Our web hosting services provide 99.9% guaranteed uptime through our secure IBM facility with 24/7/365 accountability and support.







# Service Offerings

Weblinx is a full-service digital marketing solutions agency specializing in custom website design and development, search engine optimization, content marketing, and social media management services. We work side-by-side with organizations and take a holistic approach to your online marketing to develop fully integrated digital marketing strategies. Our goal is to help your organization reach and connect with your audience members.

- Custom Website and User Experience Design
- Brand Marketing Design and Development
- Website Digital Marketing Strategy
- Consultative Website Analysis, Reports, and User Testing
- Web Development and Custom Database Development
- Ecommerce Solutions and Merchant Gateway Integration
- Online Forms and E-mail
- Optimization of Web Sites for Best Search Engine Placement (*SEO*)
- Custom Search Engine Marketing Programs (*SEM*)
- Pay Per Click Ad Campaign Management (*PPC*)
- Content Generation and Optimization
- Social Media Management
- WCAG 2.1 Level AA and Section 508 Accessibility Compliance Standards
- Open Source Content Management System Integration and Security Maintenance
- Website Hosting Plans – Dedicated and Shared
- Website Maintenance Agreements





# Management Team

## **Andy Clements (Chairman and CEO)**

Andy has over 25 years of experience in designing websites and has a Master's Degree in Business Administration with an emphasis in Operations and Technology from Aurora University. He is a Business and Marketing Instructor at Waubensee Community College and is involved with a great number of community service projects.

## **Theresa Kuhl (Sales and Digital Marketing Manager)**

Theresa has over 35 years of experience in sales and sales management, with a Bachelor of Arts degree in Journalism and Mass Communication from the University of Iowa. She has worked in advertising sales for both print and broadcast media, and enjoys partnering with clients to greatly enhance their digital marketing efforts. Theresa is an 18 year employee with Weblinx.

## **Joe Chavez (Project Manager)**

Joe has over 16 years experience in website and graphic design and has been with Weblinx for over 12 years. He is a graduate of Columbia College Chicago with a Bachelors Degree in Music Business Management and a minor in Web Design. Joe specializes in creating a unique vision and helping the customer achieve their goals.

## **Rick Pawela (Art Director)**

Rick is an International Award Winning Interactive Designer and a graduate of Columbia College Chicago with his Bachelor's Degree in Interactive Media Design. Rick plays a critical role in creating graphics that leave a memorable impression through the use of Animation and Motion Graphics techniques. Rick has been with Weblinx for over 18 years.

## **Jacob Bearce (Lead Developer)**

Jacob has been involved with website development for the last 17 years and has been with Weblinx for 15 years. He has contributed to many open source projects, including Ninja Forms, Advanced Custom Fields, and vinyl-ftp, among others. Jacob always stays up to date on the latest industry developments to insure that each project produced is accessible, performant, and robust.

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Weblinx has a team of 15 digital marketing specialists ranging from front-end developers, back-end developers, graphic designers, content developers, social media managers, and marketing consultants. The work defined within this proposal will be conducted by Weblinx employees. No sub-contractors are used in the consultation and development of our custom websites.





# Recent Library Experience

Weblinx has worked with numerous libraries since our inception in 2001. Here are examples of our more recent work.

**Bolivar-Harpers Ferry Public Library**

[www.bolivarharpersferrylibrary.com](http://www.bolivarharpersferrylibrary.com)

**Catskill Public Library**

[www.catskillpubliclibrary.org](http://www.catskillpubliclibrary.org)

**C.H. Booth Library**

[www.chboothlibrary.org](http://www.chboothlibrary.org)

**Crystal Lake Public Library**

[www.clpl.org](http://www.clpl.org)

**Deerfield Public Library**

[www.deerfieldlibrary.org](http://www.deerfieldlibrary.org)

**Flossmoor Public Library**

[www.flossmoorlibrary.org](http://www.flossmoorlibrary.org)

**Geneva Public Library District**

[www.gpld.org](http://www.gpld.org)

**George H. & Ella M. Rodgers Memorial Library**

[www.rodgerslibrary.org](http://www.rodgerslibrary.org)

**Glencoe Public Library**

[www.glencoelibrary.org](http://www.glencoelibrary.org)

**Glenwood-Lynnwood Public Library District**

[www.glpld.org](http://www.glpld.org)

**Indian Trails Public Library District**

[www.indiantrailslibrary.org](http://www.indiantrailslibrary.org)

**Lincoln Township Public Library**

[www.lincolntownshiplibrary.org](http://www.lincolntownshiplibrary.org)

**Marshalltown Public Library**

[www.marshalltownlibrary.org](http://www.marshalltownlibrary.org)

**Millville Free Public Library**

[www.millvillelibrary.org](http://www.millvillelibrary.org)

**Mount Prospect Public Library**

[www.mppl.org](http://www.mppl.org)

**Niles-Maine District Library**

[www.nileslibrary.org](http://www.nileslibrary.org)

**North Chicago Public Library**

[www.ncplibrary.org](http://www.ncplibrary.org)

**Orange City Public Library**

[www.orangecitylibrary.org](http://www.orangecitylibrary.org)

**Orland Park Public Library**

[www.orlandparklibrary.org](http://www.orlandparklibrary.org)

**Paw Paw District Library**

[www.pawpawlib.org](http://www.pawpawlib.org)

**Plainfield Public Library**

[www.plainfieldpubliclibrary.org](http://www.plainfieldpubliclibrary.org)





# Project Management

Weblinx has the experience and personnel to see that the project is completed in a timely fashion. Joe Chavez, our Project Manager, and Rick Pawela, our Art Director, will organize the distribution of work to the Weblinx design team. A staff designer will be selected to create the **Shorewood-Troy Public Library District** initial custom home page design concepts.

Upon project initiation, a timeline will be presented to **Shorewood-Troy Public Library District** with important milestones for the project. Theresa Kuhl, Sales and Digital Marketing Manager, will work directly with the **Shorewood-Troy Public Library District** staff to communicate project status updates and ensure all milestone goals are being met during the design, development, content migration, page building, and testing process.

An initial project planning and discovery meeting will be scheduled at the preference of **Shorewood-Troy Public Library District** and the Weblinx team. This discovery meeting will address organizational business goals, marketing objectives, and factors related to improving user interaction and engagement.

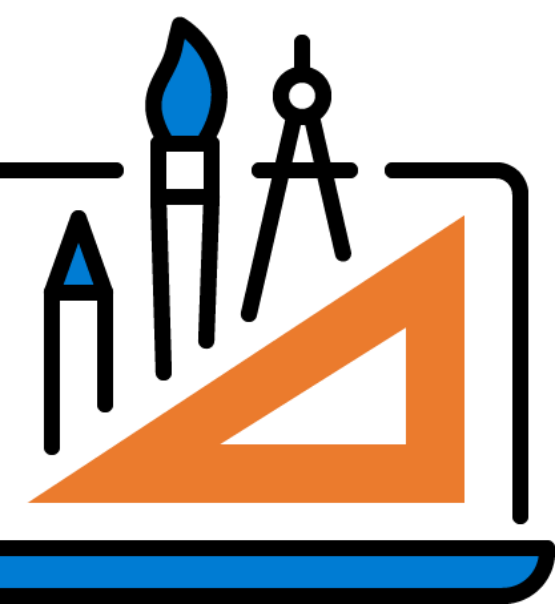
The discovery process will specifically address:

- Strategic Organizational Goals and Requirements
- Mobile-First Website Design Approach Related to User-Driven Journeys Based on Viewing Device
- Content Migration Strategy and Analytics Review
- Technical Review and Project Scope Definition (*Creative Project Brief Review*)
- Usability Review Related to User Personas, Audience, and Workflow
- Information Architecture (IA) and Navigational Structure Analysis
- Website Improvement Recommendations and Main Communication Goals

The Weblinx creative team will collaborate with the **Shorewood-Troy Public Library District** staff so that we continue to acknowledge project goals and offer ongoing communication. Weblinx will be available for status update meetings throughout the design, development, and testing process. We will offer up to two (2) hours of toolset training with the **Shorewood-Troy Public Library District** staff before and after the launch of the new website.



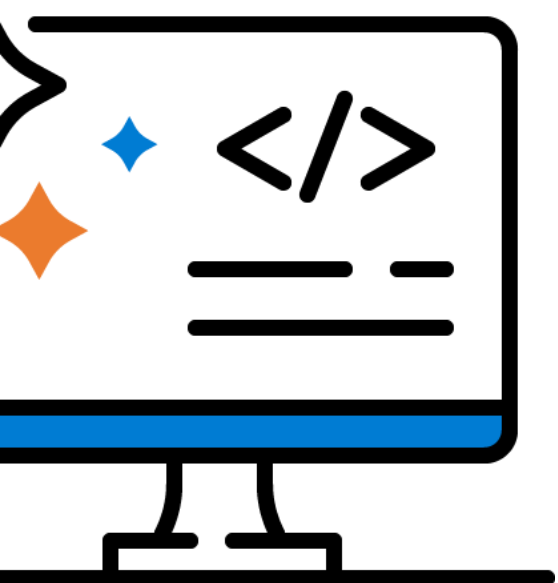
# Our Process



## Phase 1: Full Custom Design, Revisions, and Site Interactivity

Following the project kick-off and discovery meeting, Weblinx will offer custom desktop and mobile home page design concepts from a staff designer using mobile-first, responsive web design for scalable viewing on portable devices. The design concepts will be based on the information gathered and priorities established during the project discovery meeting with **Shorewood-Troy Public Library District** staff, and through careful review and discussion of the project creative brief.

The home page design concepts will go through an extensive revision process before the final designs are achieved. Custom desktop and mobile internal page designs will be completed following home page graphics approval and a consistent theme will be carried throughout the website.

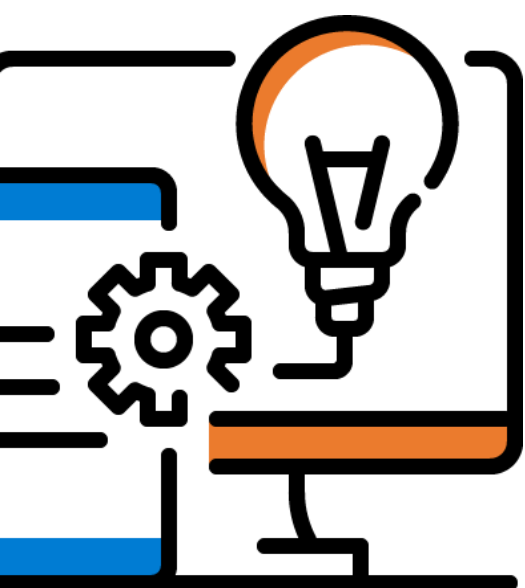


## Phase 2: Full Content Integration to Include Client Customizations

After the static designs have been approved, Weblinx will take the graphics and build the custom code for the site. Weblinx will build all necessary pages of website content with migrated and/or customer supplied new content. Additional functionality and customizations will be implemented at this time. A demo site will be created and sent to **Shorewood-Troy Public Library District** for review and feedback.



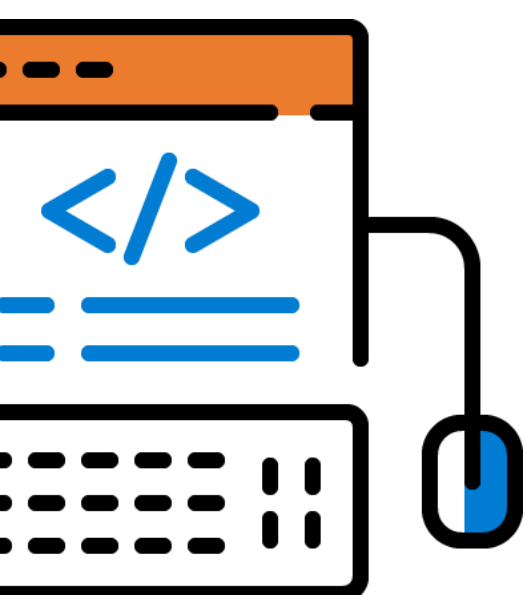
# Our Process (continued)



## Phase 3: Training, Site Enhancements and Testing

Following the build of the website, Weblinx will train **Shorewood-Troy Public Library District** staff members on how to use the WordPress Content Management System and all associated plug-in technology. Weblinx will work closely with **Shorewood-Troy Public Library District** staff to make enhancements to the existing areas of the website for improvement of the formatting and overall look.

Weblinx engages in extensive beta testing and editing throughout this phase by running the site through automated tools and manually checking to ensure all functionality is working per our high performance standards. The site will be cross-platform browser tested to ensure compatibility on a wide variety of displays, devices, and operating systems prior to launch. We have developed code that is future-proof to combat future device changes.



## Phase 4: Final Review and Project Completion

Customer completes a final review and approves the website for public launch. Weblinx makes any final edits and continues to test the site prior to launch.

Following the website launch, Weblinx administers the following optimization strategies to ensure top search engine rankings and performance: Unique ALT Tags, Page Titles, Meta Descriptions, Live Text Navigation, Section 508 Accessibility Compliance, Website Speed Optimization, XML Sitemap Creation, and SSL (*https*) Page Encryption with Hosting Plan. Weblinx will continue to monitor and link test the **Shorewood-Troy Public Library District** website for a 30-day period following project completion and the launch of the new site.





# Scope Summary

**Shorewood-Troy Public Library District's** digital marketing deliverables will consist of the following components:

- ✓ Creative Brief to Be Distributed and Reviewed with **Shorewood-Troy Public Library District** Staff
- ✓ Assist **Shorewood-Troy Public Library District** with Site Map and Information Architecture
- ✓ Make Layout (*User Experience*) Recommendations for Site Based on Evaluation of Current User Journeys and Best Design Practices
- ✓ Custom Desktop and Mobile Home Page Design Concepts with Design Revisions
- ✓ Custom Desktop and Mobile Internal Page Design Concepts with Design Revisions
- ✓ Code Website Utilizing Responsive, Mobile-First, User-Centered Design Approach w/AMP Elements for Quick Load Time
- ✓ PWA (*Progressive Web Application*) Code for Native, App-like User Experience to Cross-Platform Web Applications
- ✓ Integrate WordPress Content Management Solution (v 6.3.1)  
*The WordPress CMS platform is Open Source and based on PHP and MySQL, and has many features including plug-in architecture and template systems. All navigation is automated based on simple selection criteria and a user friendly dashboard. New pages can be added at any time and edited through the use of a WYSIWYG content editor. This editor can be customized and will be structured to meet **Shorewood-Troy Public Library District's** specific needs. For instance, permissions may be set up so that staff members may submit to a supervisor for approval prior to publishing. The **Shorewood-Troy Public Library District** staff will have the ability to edit pages and scale images, post current news releases, announcements, PDF/JPG/GIF documents, links, and highlight important text live from the frontend with unlimited concurrent editors using browser based administration.*
- ✓ Use Appropriate Navigation for the Website (*Dropdowns, Sticky, Mega Menu, Breadcrumbs, etc.*)
- ✓ Upcoming News and Events Listing on Home Page Via Communico



# Scope Summary (continued)

- ✓ Digital Resources Library Section
- ✓ Meeting Minutes and Agendas Section
- ✓ Prominent Catalog and Website Search Feature
- ✓ Create Rotating Slideshow on Home Page of Website w/Auto Expire Content
- ✓ Online Form and Survey Building Tool (*Ninja Forms*) + Build All Online Forms for the Site
- ✓ Calendar of Events Via Communico
- ✓ *Reserve A Room Via Communico*
- ✓ *Program Registration Via Communico*
- ✓ Emergency Alerts Banner Feature
- ✓ Link to All Other Third Party Database Systems As Required (*Polaris, Unique, etc.*)
- ✓ E-News Sign Up Via Third Party System
- ✓ Newsletter Archive
- ✓ Build All Necessary Website Pages
- ✓ Social Networking Site Links
- ✓ Set Up All Page Redirects
- ✓ Implement Google Analytics To Monitor Website Statistics
- ✓ Implement Organic SEO Strategies To Assist with Search Engine Placement (*Yoast SEO*)
- ✓ Test Site for Optimum Performance Prior to Launch Using Google PageSpeed Insights and Lighthouse Tools



# Scope Summary (continued)

- ✓ Usability Testing with **Shorewood-Troy Public Library District** Staff and Public As Needed
- ✓ Implement Website Page Speed Optimization Strategies to Increase Image Load Time (*WordPress Smush Image Compression, WordPress Super Cache, HTTP/2 Support, Auto Generate WebP Images, Lazy Load Images, Concatenate & Compress CSS and JavaScript if Required*)
- ✓ Engage In Extensive Beta and Cross-Platform Browser and Operating System Testing Throughout Building Process, in Beta Environment, and Following Launch to Ensure Site Works Across All Web Browsers, Operating Systems and Screen Resolutions (*Chrome 109+, Firefox 115+, Safari 15.6+, Edge 111+, Opera 97+*), and Incompatible or Legacy Browsers As Needed (*Windows 10+, iOS 16+, iPadOS 16+, macOS 11+, Android 10+, and Linux as Requested*)
- ✓ WCAG 2.1 Level AA Accessibility Compliance Standards Used  
*Weblinx builds all websites in compliance with Section 508 of the Americans with Disabilities Rehabilitation Act. This compliance is directly responsible for and meets all Federal government agency web accessibility guidelines. To achieve this end we provide descriptive and blank ALT Tags for all images, text/descriptions for audio/video files, text based menus, TH tags / SCOPE tags on tables, appropriate header tags, use role/aria parameters, use screen-reader only labels, and use em/rem units to ensure theme is navigable by keyboard alone. Weblinx will train the **Shorewood-Troy Public Library District** staff on how to keep the site within these guidelines. Weblinx will test the site with Pa11y and AChecker prior to launch to ensure full compliance.*
- ✓ Train the **Shorewood-Troy Public Library District** Staff on the WordPress Content Management System, All Associated Plug-in Usage, and Google Analytics With Supporting Documentation Provided (*2 Hours*)
- ✓ Launch One Responsive and ADA Compliant Website for the **Shorewood-Troy Public Library District**
- ✓ Continue to Monitor and Link Test the **Shorewood-Troy Public Library District** Site Following Launch (*30 Days*)





# Project Work Plan and Timeline

## Phase 1: Custom Website Design

Design **Shorewood-Troy Public Library District** website with Weblinx expert user experience design team.

- Creative Brief Review and Project Discovery
- User Experience Design Review and Recommendations
- Desktop and Mobile Home Page Designs Concepts w/Design Revisions
- Desktop and Mobile Internal Page Design Concepts w/ Design Revisions
- Provide Detailed Project Schedule to Client

## Phase 1 Timeline: 6 Weeks

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## Phase 2: Full Content Integration to Include Client Customizations

- Code Website Utilizing Mobile-First, Responsive Design Approach
- Integrate WordPress CMS
- Use Appropriate Navigation
- Home Page Rotating Image Area
- Upcoming News and Events Listing on Home Page
- Prominent Catalog and Site Search Feature
- Meetings and Agendas Archive
- Newsletter Archive
- Online Form Building Tool + Build All Online Forms
- Calendar of Events w/Communico
- Room Reservation w/Communico
- Program Registration w/Communico
- Emergency Alerts Banner
- Link to All Third Party Database Systems As Required (WLS, etc.)
- E-News Sign Up
- Build All Necessary Website Pages
- Social Networking Site Links
- Google Analytics Integration
- Section 508 Accessibility Compliance Standard Used
- Working Demo Provided in Beta Environment

## Phase 2 Timeline: 10 Weeks





# Project Work Plan and Timeline

## Phase 3: Beta Testing and Toolset Training

Train **Shorewood-Troy Public Library District** staff on the WordPress CMS and all plug-in technology, and provide supporting documentation. Assist with making all necessary enhancements to formatting and overall look. Test site on multiple browsers and operating systems. Troubleshoot any questions posed by client during the training, revisions, and usability testing process.

## Phase 3 Timeline: 2 - 4 Weeks

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## Phase 4: Project Completion

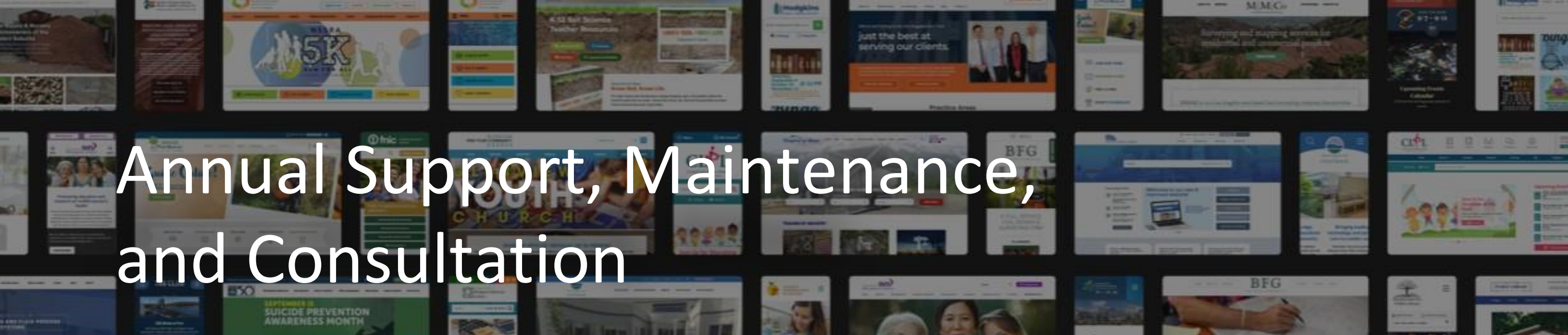
Customer sign-off upon completion. WordPress CMS and document management training continues if needed. Submission and optimization to Search Engines.

- Testing Continues
- Set Up All Page Redirects
- Unique Page Titles and ALT Tags
- Meta Descriptions
- Live Text Navigation
- XML Sitemap Creation
- Implement Organic SEO Strategies To Assist with Search Engines
- Website Speed Optimization Strategies Implemented / Google PageSpeed Insights and Lighthouse Performance Testing
- Run Site Through Pa11y and AChecker to Ensure Compliance
- Launch One Responsive & ADA Compliant Website

## Phase 4 Timeline: 1 Week

**Timeline for Completion of the Shorewood-Troy Public Library District Website Project: 19 - 21 Weeks**





# Annual Support, Maintenance, and Consultation

Weblinx develops websites that are easy to maintain for our library clientele. We have included two (2) hours of technical assistance, maintenance, and support to the **Shorewood-Troy Public Library District** staff for 30 days following the completion and launch of the new website.

Weblinx will offer annual website hosting for the **Shorewood-Troy Public Library District** site if required. WordPress CMS and plug-in security maintenance may also be provided to ensure software versions are current. Regular backups and security audits may occur at a maximum of once per day and at a minimum of once per week with the website hosting plan.

Dedicated account support, maintenance and consultation management plans are available after the 30-day support period as outlined in Additional and Optional Fees in this proposal. Various maintenance plans are available, and may cover website upgrades, site maintenance, ongoing conversation and continued recommendations for improving the website as new technology and applications are available.

Annual page speed optimization, which includes server-side and coding updates, along with accessibility reviews and updates may also be conducted on the site. We will keep **Shorewood-Troy Public Library District** abreast of any impactful Google algorithm changes and update the site in conjunction with these changes to improve results and keep the site performing at its best.

Weblinx normal business hours are Monday through Friday from 8 AM to 5 PM CST. Our main office line is 630.551.0334. In case of emergency, a 24-hour hotline is available at 630.551.0334 x218. We will respond to problem requests within four (4) hours, and resolve problem requests within 24 hours of receiving the request.



# References

## Marshalltown Public Library

Sarah Rosenblum, Library Director  
105 West Boone Street, Marshalltown, IA 50158

T: 641.754.5780  
E: srosenblum@marshalltown-ia.gov  
www.marshalltownlibrary.org

Client Since 2017



## Oswego Public Library District

Sarah Skilton, Library Director  
32 W. Jefferson Street, Oswego, IL 60543

T: 630.554.3150  
E: sskilton@oswego.lib.il.us  
www.oswego.lib.il.us

Client Since 2003



## Plainfield Public Library District

Lisa Pappas, Library Director  
15025 S. Illinois Street, Plainfield, IL 60544

T: 815.436.6639  
E: lpappas@plainfieldpubliclibrary.org  
www.plainfield.lib.il.us

Client Since 2008





# Price Proposal

To:

**Jennie Mills, Library Director  
Shorewood-Troy Public Library District**

650 Deerwood Drive  
Shorewood, IL 60404

[www.shorewoodtroylibrary.org](http://www.shorewoodtroylibrary.org)

**815.725.1715**

**Submitted 10/17/2023**

From:

**Theresa Kuhl, Sales & Digital  
Marketing Manager**

**Weblinx, Inc.**

165 Kirkland Circle  
Oswego, IL 60543

**630.551.0334 x111**

[theresa@weblinxinc.com](mailto:theresa@weblinxinc.com)



**CREATIVE  
INNOVATIVE  
RESPONSIVE**





# Pricing Schedule

**Deposit:** \$2,227.50

## Phase 1

Project Discovery, Custom User Experience Design

**Installment 2:** \$2,227.50

## Phase 2

Custom Build, WordPress Content Management System Integration, Content Migration

**Installment 3:** \$2,227.50

## Phase 3

Demo Review, Usability Testing, Training, and Revisions

**Final Installment:** \$2,227.50

## Phase 4

Add'l Testing, Training, Revisions, and Site Launch

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**Total Memorial Hall Library Project Investment: \$8,910**  
**(66 Hours @ \$135/Hour)**



# Additional, Optional, and Hourly Fees

## Website Hosting - Annual

Weblinx will provide **Shorewood-Troy Public Library District** with a hosting plan that meets the organization's specific needs. Our servers are located in an IBM facility with 24/7/365 accountability. Weblinx servers are linked to the best network in the industry with unrivaled connectivity and an array of Tier One Providers that sets them apart. The robust network and infrastructure guarantees maximum up time and superior performance. This includes six 2 megawatt back-up power generators, over 3,000 tons of cooling capacity, 13 separate fiber ring connectivity and up to OC-192 connection. (See [www.myweblinx.net](http://www.myweblinx.net) for more information on Weblinx website hosting plans).

Starting at \$300/year

## Annual WordPress CMS and Plug-In Security Maintenance

Weblinx will perform WordPress CMS and plug-in security updates on the **Shorewood-Troy Public Library District** website as new versions are released to minimize website vulnerability.

\$250/year

## Daily Website Backups

Add-on to web hosting plan upon request.

\$120/year

## Big Cartel E-Commerce Integration

Weblinx will set up the Big Cartel shopping cart for the **Shorewood-Troy Public Library District** website and train staff on how to use the tools. If the library wants to set up the cart themselves, the set up fee would be waived.

\$1,080/one-time fee

## Annual Technical Support and Site Maintenance

As Needed Basis  
10 Hours Per Year  
20 Hours Per Year

\$135/hour  
\$110/hour  
\$100/hour

## Hourly Rates

Programming / Training  
Front End Development  
Search Engine Marketing Services  
Video, Audio, or Animated Enhancements  
Web Design or Graphic Design Services  
Professional Copywriting / Copy Editing (SEO-Friendly)  
Social Media Management

\$135/hour  
\$135/hour  
\$135/hour  
\$135/hour  
\$135/hour  
\$135/hour  
\$135/hour





# Terms & Conditions

## Standard Payment Plan

The **Shorewood-Troy Public Library District** website design project total is \$8,910. A deposit in the amount of \$2,227.50 will be due to initiate the project. The remaining balance of \$6,682.50 will be invoiced over three remaining installments, with \$2,227.50 due per installment. If hosting with Weblinx, the web hosting fee (*starting at \$300/year*) and the WordPress CMS and plug-in security maintenance fee of \$250/year will be invoiced following the launch of the website and annually thereafter. Extended payment plans are available. Payments may be made payable to Weblinx, Inc.

## Default of Payment

In the event of default of payment, customer agrees to pay all cost of collection, including a reasonable attorney's fees. Venue for litigation arising between the parties to enforce the terms of this agreement shall be fixed in the 16th Judicial Circuit, Kendall County, Illinois.

## 30-Day Grace Period

Weblinx will administer up to 2 hours of standard text and photo changes on the website up to 30 days following the website launch. Layout, programming changes, or abundant page additions will require an additional fee billable at \$135/hour. The **Shorewood-Troy Public Library District** will be notified if and when additional fees are required. Maintenance plans are available for purchase after the 30 day grace period.

## Deliverable Ownership

**Shorewood-Troy Public Library District** will own all rights to the content and source code of the website.

## Work

Weblinx will take responsibility for the quality and timeliness of the work produced. We have allotted a total of 66 hours for completion of the scope deliverables. If the actual duration of the work exceeds the estimated number of hours allotted to complete the work, Weblinx has the right to review the project scope and additional fees may apply.

## Graphics Approval

E-mail approval of graphics is required to build the website.



# Let's Get Started

## Expiration

There is a 30-day rate lock on this agreement, from the date indicated below. After this period of time, Weblinx has the right to alter fees based on the going rates for service.

## Hold Harmless / Indemnification

The customer agrees it will indemnify and hold harmless Weblinx from and against all losses, claims, suits or other legal expenses of any nature imposed upon or brought against them by reason of any act of omission by customer/ client or its agent or employees in the course of performing the work of providing the services that are the subject of this contract. Any losses will be limited to the amount of the work order/proposal.

Customer has caused this agreement to be effective as of the date indicated below. Please authorize this page and return to Weblinx, Inc. Thank you for your business.

**Jennie Mills, Library Director**

**Shorewood-Troy Public Library District**

650 Deerwood Drive

Shorewood, IL 60404

**For Shorewood-Troy Public Library  
District:**

Signature

Date

**Theresa Kuhl, Sales and Digital Marketing  
Manager**

**Weblinx, Incorporated**

165 Kirkland Circle

Oswego, IL 60543

**For Weblinx:**

Signature

Date 10/17/2023

**Sarah Skilton**

Tue, Oct 31, 5:01 PM (6 days ago)

to me, Melissa

Hi Jennie and Melissa!

Here are my answers and I hope they help when you are making a decision! If you need anything else, just ask!

Sarah

- 1) In general, are you happy with the website that Weblinx designed for your library? Yes, we are happy, we have had them redesign a couple times and they do a great job translating what the staff wants to what appears on the website
- 2) Was Weblinx responsive to design or other concerns that you or your management team had during the design process? Yes, with the caveat that we have had them for a very long time and they have worked with our staff for many years - we did the design process in person and were able to watch all the changes as they went through the different versions.
- 3) Did the design and build of the website stay roughly on schedule? Yes, the only delays were from our end as we ended up adding people when we had staff changes and they were able to change the design in response to the new staff members ideas – but this was over 20 years ago.
- 4) Has Weblinx support been helpful and responsive once the website was designed and built? Yes. We like the fact that they deal with many different libraries and come to us with a new trend and examples to see if we want to make any changes. Also, they stay in touch and make sure we are happy with what they are doing on the site.
- 5) Have you experienced significant downtime with the website? No, we have not – the only issue we have had was when we were upgrading the server for WordPress (we host it) and even though it was not their system, they tried to help during the upgrade but were not familiar with our system. We ended up doing it all in house. They don't host it and it was our server, so this might be a little picky ;)
- 6) Have you experienced any problems with the hosting of the site? No, we host it ourselves and have control over it.

7) Is your site mobile-friendly and ADA-accessible? Yes to both.

8) Do you have any other feedback that you would like to share? We have worked with them over 20 years and still plan on having them more!

Director of Oswego Public Library



**Lisa Pappas**

Mon, Oct 30, 12:07 PM (7  
days ago)

to me, Melissa

Hi, Jennie and Melissa~ My answers are in blue below.

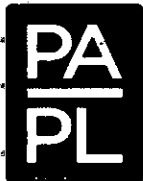
On Mon, Oct 30, 2023 at 11:51 AM Jennie Mills <[jmills@shorewoodtroylibrary.org](mailto:jmills@shorewoodtroylibrary.org)>  
wrote:  
Hi Lisa --

I hope that you're doing well! I'm copying Melissa, STPL's Marketing Coordinator, on this email, too. STPL is going through the RFP process for a new website designer; one of the finalists is Weblinx. They gave your name/Library as a reference. I hope that you can take a minute to answer a few quick questions for me.

- 1) In general, are you happy with the website that Weblinx designed for your library? Yes (we've gone through one full design and then a big refresh)
- 2) Was Weblinx responsive to design or other concerns that you or your management team had during the design process? Yes
- 3) Did the design and build of the website stay roughly on schedule? Yes; we had 2 pieces to the project that dragged on but they were not integral to the website
- 4) Has Weblinx support been helpful and responsive once the website was designed and built? Yes
- 5) Have you experienced significant downtime with the website? I can count on one hand the number of times our website has been down since we've been with them which is well over a decade and the longest outage was a few hours and that was only once; it's generally a few minutes.
- 6) Have you experienced any problems with the hosting of the site? Nope

7) Is your site mobile-friendly and ADA-accessible? Yes. I will say you need to be vigilant in the design process that you and your staff are looking at the site on various mobile devices, using different browsers, etc. so you know you've got all of them covered.

8) Do you have any other feedback that you would like to share? I have no qualms about recommending Weblinx.



**Lisa Pappas**

Director | **Plainfield Area Public Library**

815.439.2874 | [papl.info](http://papl.info)

15025 S. Illinois St., Plainfield, IL 60544



11/9/2023

TO: Board of Trustees, Shorewood-Troy Library

FROM: Jennie Mills, Library Director

RE: Cleaning Service Comparisons

The Library's current cleaning company (Best Quality) is not performing to standard. Trash containers are not consistently being emptied. The toilets are not consistently being cleaned, and we can tell that the floors are not being mopped well.

The Library pays our current cleaning company \$1380 monthly (**\$16,560** annually) for 3 visits weekly.

The Board requested that a cost comparison be done.

In house cleaning

Anticipated cost:

A 19-hour employee, making \$15.00 an hour = \$14,820

+ FICA = \$ 1,133

+ Add. Worker's Comp = \$ 475

---

**\$16,088**

Rough additional cost for cleaning supplies currently supplied by the cleaning company (vacuum cleaner bags, glass cleaner, disinfectants, etc.) = +/- \$1,000 = **Total cost is approximately \$17,088.**

I have enclosed a rough draft of a potential job description in your board packet.

I did ask the SAIL email list which libraries use in-house cleaning v. outsourced janitorial. The libraries that responded **yes**:

- Seneca (which reported no issues)
- Bourbonnais, which recently added an outsourced layer on top of their facilities manager due to other staff members covering an extended health issue for 6 weeks. So, that library is paying for a day porter and a 3-day-a-week outsourced cleaning company for the deep cleaning.
- Fossil Ridge reported that the library added circulation duties to this staff member's duties to get the person enough hours to make the position attractive enough for recruiting – they had a hard time getting candidates to apply. That position is now 40 hours, making the position eligible for health insurance, IMRF, etc.

- White Oak was the only library that replied with the salary they paid the employees - **\$16.50** hourly. I did estimate \$15.00 for the salary for Shorewood-Troy Library.

In the **No** answer:

Joliet Public Library chose to outsource janitorial in 2018 due to a high volume of worker's comp claims, which increased their costs. The \$475 rate above is quoted to us by our insurance company, with our library having no Worker's Comp claims in the previous 10 years. When Ms. Millen did her analysis in 2018, she estimated that she would save \$100,000 in Worker's Comp insurance annually by outsourcing; Joliet Library is a much bigger Library, however.

The SAIL list reaches 53 libraries, but those are the libraries that answered the email request.

#### Cleaning Proposals

- Imperial Services: \$1565 monthly/\$18,780 annually (References enclosed)
  - Certificates of Insurance provided \$1,000,000 General Liability/\$1,000,000 Work Comp
  - Furnish Cleaning Supplies
  - Furnish Supervision
  - 24/7 Live support, assigned on-site staff
- BuildingStars \$1495 Monthly/\$17,940 (Will be provided once received)
  - Certificates of Insurance provided \$1,000,000 General Liability/\$1,000,000 Work Comp
  - Furnish Cleaning Supplies
  - No on-site supervision
  - Assigned Quality Control manager/with logbooks to communicate between cleaners
- Cosmopolitan Building Services \$1875 monthly/\$22,500
  - Certificates of Insurance provided \$1,000,000 General Liability/\$1,000,000 Work Comp
  - Furnish Cleaning Supplies
  - Random Quality Assurance Visits
  - Proposal does not cover feedback with company
- Maintenance Services Chicago, \$1,950 monthly/\$23,400 annually
  - Certificates of Insurance provided \$1,000,000 General Liability/\$1,000,000 Work Comp
  - Furnish Cleaning Supplies
  - On-site Supervision
  - Can contact Area Supervisor

I've enclosed the proposals for all 4 cleaning companies in your packet.

There are other advantages to outsourcing (outside of cost):

- Coverage doesn't have to be found for outsourced companies during sick/vacation time. Part-time STPL employees receive 50 hours of paid vacation time and 45 hours of paid sick time annually, plus 2 personal days after one year of employment.

- While this employee's schedule can be arranged to do wet-mopping, vacuuming, and other tasks that aren't typically done when the library is open to the public, there may be times when they would be the only employee in the facility.

## **CUSTODIAN**

The Custodian works under the direct supervision of the Director of the Library and is responsible for the general cleaning of the Library facility. This is a 19-hour, non-exempt position. The Custodian has no supervisory responsibilities.

### **Responsibilities and duties:**

1. Performs daily cleaning of the Library, including, but not limited to:
  - a. Empty trash cans
  - b. Cleaning the bathroom and staff breakroom
  - c. Cleaning the patron bathrooms
  - d. Vacuuming all carpeted areas
  - e. Mopping tiled floors in the bathroom and the lobbies
  - f. Cleaning the window glass on doors
2. Performs weekly cleaning tasks of the Library, including, but not limited to:
  - a. Dusting shelves
  - b. Dusting baseboards
3. Restock cleaning items as needed, including, but not limited to:
  - a. Paper towels and toilet paper in all bathrooms
  - b. Air fresheners in bathrooms
  - c. Trash liners in trash cans
4. Monitors cleaning supplies and alerts the Finance clerk when more cleaning supplies are needed
5. Assists in keeping walkways clear of snow and ice.
6. Assists with set-up and tear-down of community rooms for programming needs.
7. Performs other duties as assigned.

### **Minimum Qualifications:**

Requires knowledge and work experience in custodial. Must have a high school diploma or a GED, along with reliable transportation to and from work.

**Work Schedule:** The Custodian generally works weekdays and weekends in the early morning or the late evening hours, though daytime hours may sometimes be required as well.

### **Necessary Skills, Knowledge, and Abilities:**

1. Ability to work with minimal supervision and communicate effectively with the public and with library staff.
2. Must possess a strong work ethic.
3. Excellent time management skills.
4. The ability to multi-task.
5. The ability to lift, bend, and stoop and to remain on feet for a long period of time; the ability to lift up to 100 pounds.
6. The ability to use and knowledge of commercial cleaning chemicals.
7. The ability to work inside and outside in poor weather conditions.

# Presentation Agenda

## SECTION ONE 1

Role Reversal.

Here's what you need to know about us.

---

We Listened.

Here's what we've already learned about your facility *from you*. Then we blend what we know about service and what your building needs into a cleaning plan designed to last.

---

## SECTION TWO 2

Partnership for Tomorrow.

Our goal is a long-term mutually beneficial relationship. That doesn't happen by accident. Here's how we make it last.

---

## SECTION THREE 3



**SECTION  
ONE  
1**

# The Closer You Look, The Better We Look.

Our goal will be to answer  
all your questions before  
you even ask them.

- ANTICIPATION
- PREPARATION
- EXPERIENCE

# About Us



Imperial Service Systems, Inc. was established in 1973. The company started with the premise that it would not bid jobs based on price, rather bids would be done based on what it would take to do the job to the client's expectations. As the company grew, a multi-level supervisory program and a system of checks and balances designed to ensure customer satisfaction and the continued growth of the company was established. Those were, in fact, the results!

Today, Imperial is one of the largest janitorial contractors in the nation - so says *Services Magazine*, which listed Imperial among the top 70 building maintenance companies in the country.

- ☐ Established 1973 servicing Northeast Illinois, NE Ohio since 1982, and West since 2015
- ☐ Not a franchise
- ☐ Reachable live 24/7 (no voicemail or answering machine)
- ☐ Time tested proven system of checks and balances
- ☐ Dedicated multi-level supervision



Some of the Imperial family

**ISSA** MEMBER  
The Experts  
on Cleaning and Maintenance

Visit Our New Website at  
[imperialservicesystems.com](http://imperialservicesystems.com)



[facebook.com/imperialservicesystems](https://facebook.com/imperialservicesystems)



# Our Team is Your Team



Isn't This the Depth of Organization Your Facility Deserves?



Mark Chmielewski 28 yrs.  
V.P. of Operations



Mark Kopec 23 yrs.  
Operations Manager



Andy Seskiewicz 32 yrs.  
Operations Manager



Nelson Estevez 1 yr.  
Operations Manager



Lynette Lankford 1 yr.  
Quality Assurance



Diana Orihuela 1 yr.  
Quality Assurance



Roxana Cemilo 1 yr.  
Quality Assurance

## Customer Service



Aaliah Czerak 9



Heather Greer 7



Lisa Dubovik 35



Sharon Volland



Ashley Roland



Lish Buehler 29  
General Manager

## Field Management



Darek Wasilewski



Leticia Mojica  
4



Mariusz Mech  
4



Andy Chlepetis  
7



Inga Mech



Issac Flores  
19



Anna-Maria Burdek



Joanne Mokrosinska  
7



Enrique Villarreal



Ewa Boguszewska  
9



Linda Saka  
9



Frank Dabdoub  
10



Tom Okon



Donna Koltas  
7



Jimmy Pasquale  
9



Casey Laska  
4



Greg Pietrzak  
20



Ewa Zarzycka  
5



Jose Castro



Robert Rivera



Andy Bonar



Chris Mendelouski



Fernando Mojica



Elizabeth Mielniczuk



Tom Burdek  
9





# Achieving Accountability Thru Multi-Level Supervision



- COMMUNICATION
- RESPONSE
- FOLLOW-UP

Accountability and communication are the key components in Imperial's system of checks and balances. It's an ongoing **action plan**.

1. Whether you are contacting us or we are visiting your facility, we're there for you.
2. Every communication/inspection is distributed through our entire network (Vice President of Operations, Operations Managers, Area Managers, Supervisors, Quality Control and the crew) keeping everyone who is involved informed.
3. Response is quick and efficient.
4. Operations follows up on site. Customer Service will check in with you.

This proven approach delivers consistent, high quality cleaning adapted to meet your specific needs. And we deliver that level of quality every day.

Once in place, our system  
will work for you.

# Front Line Defense



We are the "Ounce of Prevention".

## Shorewood - Tory Public Library

### CREW

#### TRAINED TO "YOUR" SPECIFICATIONS...

To clean your facility to your standards.  
Experienced. Conscientious. Uniformed.

### AREA MANAGERS

#### RESPONSIBLE FOR THE PERFORMANCE...

Train the crew. Monitor the work:  
Take Pride in a job well done.



### OPERATIONS MANAGERS

#### THESE ARE OUR LINEBACKERS

Backing up our Front Liners. Bringing  
Experience. Technical Support.  
Determination. Results



### CUSTOMER SERVICE

YOU CALL; WE'RE HERE FOR YOU  
24/7 "LIVE". No "Leave a message at  
the tone..." voicemail. Never.



### QUALITY ASSURANCE/ CUSTOMER RELATIONS

#### WE KNOW WHAT IT TAKES TO KEEP YOU HAPPY

"...YOUR TOTAL SATISFACTION.  
We are committed to that objective."

### V. P. of OPERATIONS

#### "I BEGAN AS A JANITOR..."

I've been a Supervisor, Area & Ops Manager.  
Even a QC Inspector. I know cleaning. And I  
know what it takes to make you Happy"

# Emergency Services

**i IMPERIAL**  
Service System

• ANTICIPATION

• PREPARATION

• EXPERIENCE

- Emergency Services including fire, vandalism and flooding can be taken care of right away.
- Just call our hotline 630.925.1800. A live person will answer 24/7.
- Tell them that you have an emergency and what the situation is. They'll know what to do.
- Our track record of responding quickly and efficiently has helped us secure solid relationships with our clients.
- Then, a follow-up call will be made to you within 24 hours to ensure your satisfaction.

- When possible, you will be told what the charge is prior to the service being performed. In any event, we realize that other companies may take advantage of your situation. Imperial will charge a fair rate as usual.
- Imperial will be prompt, conscientious and fair. We hope you never have to experience this aspect of *The Imperial Difference*.

## Test Us!

Call our Customer Service Department at 630.925.1800  
24 hours a day, 7 days a week.  
Talk to a real person who can react quickly to your situation.

## Ready, Willing, and Capable.



## We're there when you need us.



# It's 2 a.m. and your facility has had...



... a minor fire, but there's smoke and water damage

... a flood, pipes are frozen and broke, putting a few inches of water throughout

... vandalism, a break-in left a huge mess

Who would you call?

You would call Imperial.

Why?

*Because not all janitorial services are the same.*

These are results of an independent call study conducted during the week. When these contractors were called, was the phone answered by a real person?

x = reached LIVE

Competitor	Outcome 6:00-6:30am	Outcome 7:30-8:00am	Outcome 10:00-11:35am	Outcome 2:50-3:15pm	Outcome 7:45-8:15pm	Outcome Overnight 2:00am
Best Quality			x	x		
Cardinal	x	x	x	x	x	
Complete		x	x	x		
Coverall*						
Crystal			x	x		
<b>i) IMPERIAL Service Systems, Inc.</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Jani-King*			x	x		
Majesty			x	x		
Perfect		x	x	x	x	
We Clean Green			x	x		

\* Franchise

Imperial: No voice mail. No answering machines.

We're **really** there when you need us.

# Some of Our Satisfied Customers



Channel 11, WTTW

Chicago, IL

Ms. Lauren Cohen

773.509.5406

Since 2003

Faith Christian School

Williams Bay, WI

Mr. Kevin Swedberg

262.903.0719

Since 2021

Eataly Chicago

Chicago, IL

Mr. Corey Anderson

773.230.3431

Since 2021

Worth Public Library

Worth, IL

Ms. Carol Hall

708.448.2855

Since 2010

Plasma Biological Services

Elgin, IL

Mr. Mark Pieczkiewicz

847.531.8185

Since 2015

Anshe Emet/Bernard Zell Day School

Chicago, IL

Mr. Gilberto Vargas

312.961.8947

Since 2000

Inspiration Ministries

Walworth, WI

Mr. Eric VanWormer

262.275.6131

Since 2020

St. Juliana School & Church

Chicago, IL

Mr. Ray Balcarcel

773.631.4127

Since 2010

AmeriCenters - 2 Locations

Schaumburg, IL

Ms. Stephanie Englehart

630.717.3555

Since 2010

Great Wolf Lodge

Gurnee, IL

Mr. Mikel Brito / Eric Goolst

847.623-9653 ext. 1644 mbrito@greatwolf.com

Since 2021

North Park University

Chicago, IL

Mr. Carl Wistrom

773.244.4961

Since 20

Hidden Valley Manufacturing Co.

Wheeling, IL

Mr. Ebrima Jallow

847.229.5500

Since 20

Kerry

Beloit, WI

Mr. Russell O'Donnell

608.299.5647

Since 20

Lindemann Chimney

Lake Bluff, IL

Ms. Jenny Stielow

847.918.7994

Since 201

Cancer Treatment Centers of America

Schaumburg, IL

Mr. Barry Nelson

847.342.7408

Since 2018

Comcast/Xfinity - 23 Locations

Schaumburg, IL

Mr. Mark Bernhardt

219.712.9837

Since 2013

Illinois College of Optometry

Chicago, IL

Mr. Gary Young

312.225.1700

Since 2017

Catherine Cook School

Chicago, IL

Mr. Justin Pike

312.266.3381

Since 2014

Cole Parmer

Vernon Hills, IL

Mr. John Rosset

847.327.5790

Since 2016

USA BlueBook

Waukegan, IL

Ms. Theresa Burns

847.785.2052

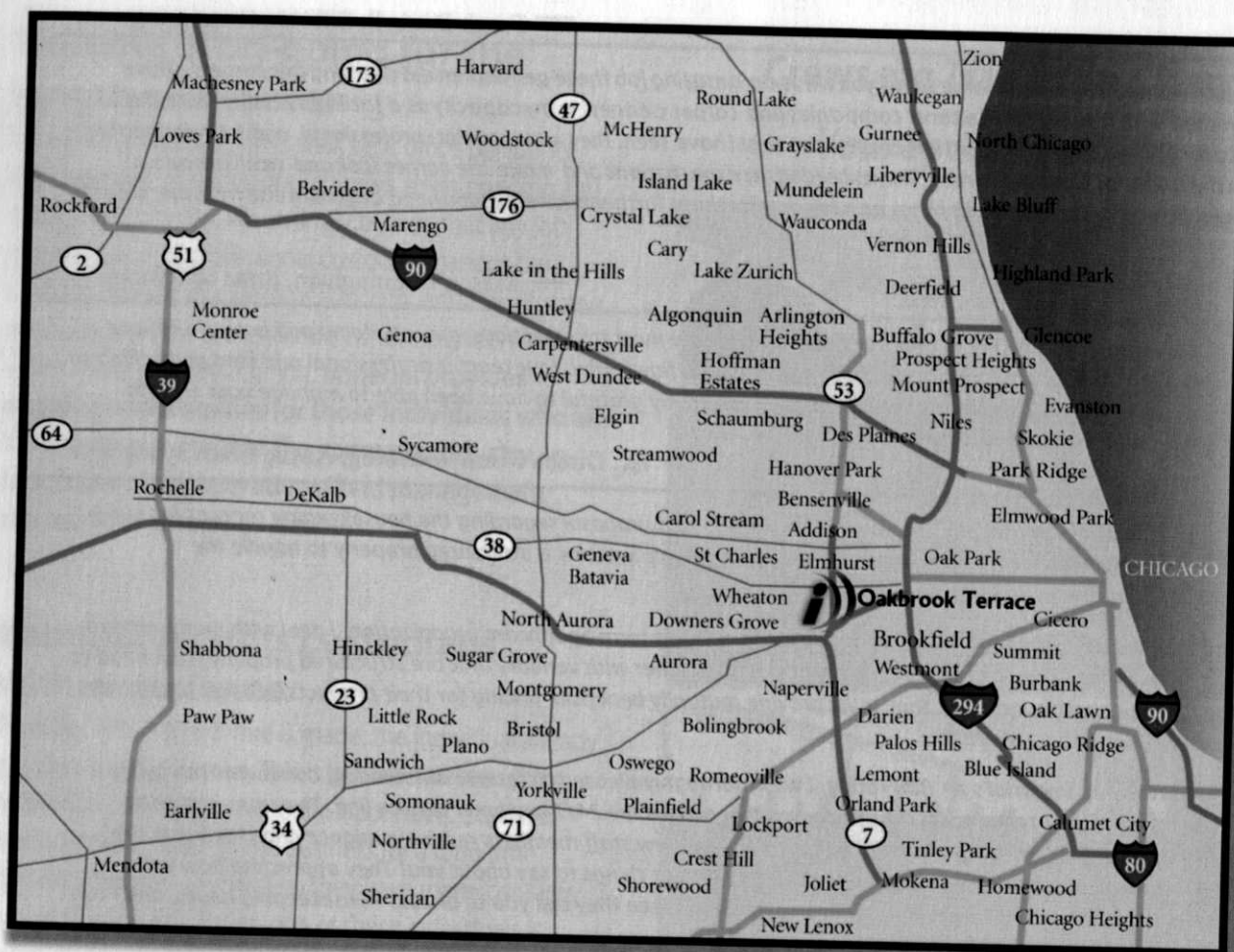
Since 2018

# We're in Your Neighborhood



And odds are we're already servicing some of your neighbors. It also means we have the staffing and supervision in place. Extra equipment and supplies are always nearby.

With Imperial you get the best of both worlds; the personal attention of a **local company** and the added strength of a **large organization**.



## Branch Office



## Youngstown, OH Since 1982

## Newest Branch Office



## Kenosha Wisconsin



# Testimonials



*"I would like all to understand that we are very pleased with the level of service and the way our facility looks since you folks have taken over. The communication that we have is awesome; we've never experienced this before. The emails about service and some of the things we've had concerns about, I consider minor tweaks in the overall scheme of things. Tom and his crew have been great and very responsive to our needs and desires... We definitely made the right decision, the difference here is like night and day."*

— Frank Bunzell, Silbrico Corporation

*"I just wanted to take the time to tell you what an amazing job these gentlemen did cleaning our carpets. I have worked with a variety of janitorial companies and carpet cleaners in my capacity as a facility manager with the State of Illinois, but these gentlemen were the best I have seen. They were prompt, professional, and knowledgeable in the arena of cleaning carpet. They exceeded my expectations and made the carpet look and smell amazing. I would be happy to work with them any day or refer them further business. If you need anything else from me, please let me know."*

— Mason Cunningham, State of Illinois

*"I just wanted to let you know that our Holy Days are the most traveled days in our building and because of your crew, we were able to serve our congregational family, flawlessly! Your team is professional and kind and willing to do whatever we put in front of them. Gilberto is extremely grateful to have been able to manage your crew to ensure that we had an efficient process."*

— Ex. Direct. Mimi Weisberg, Anshe Emet Synagogue

*"I want to thank you for your professional evaluation and proposal regarding the housekeeping services for our corporate office building! It's obvious that Imperial Service Systems is structured properly to handle the responsibilities with flying colors."*

*In my duties as Purchasing Director for five facilities, long-term healthcare organization, I deal with many vendors in a wide variety of industries. We simply choose to partner with vendors that are structured properly from head to toe for their specific industry. They must provide mutually beneficial pricing for their products/services and always look out for our best interests."*

*After reviewing Imperial's A+ BBB rating, I was thoroughly pleased to receive outstanding comments as I called quite a few of your references. Your customers appreciate the 24/7 customer service line. They also had good comments about your housekeeping staff, noting that new staff members receive guidance and training in the event of staff turnover. All of them had nothing but great things to say about you! They appreciate how you monitor the services and how beautifully you respond when they call you to discuss housekeeping issues, and I can tell you that truly means a lot to me!*

*After a thorough review, that Imperial Service Systems will take great care of our office building without us having to manage Imperial's housekeeping staff internally. You made our decision easy, Dan, and that's something I truly appreciate!"*

*Our new housekeeper, Teresa, did a very good job here this week! She's a hard worker, and she's already getting along well with staff. No doubt she'll have a nice routine here after she has more time to experience the operations of our building over the next couple of weeks. Phil is a great guy too! I feel confident with him checking on things and Teresa getting the hang of our building. This was a good move for us; thanks for all of your help getting us started!*

— T.J. Eisenbraun, Shepherd of the Valley Lutheran Retirement Services

*"Imperial does such a great job at all of our locations. We are very happy with their level of service and their prompt response on any issue that come up."*

— Adrienne Murphy, Expeditors Chicago

# Training

## **Training is on-going for the length of a career**

Imperial sees training of its staff, be it office personnel, management, or our custodial crews, as an ongoing and career-long process. We strongly believe that any job, including that of professional custodian, cannot be properly learned in a week or a month. Additionally, new methods and new materials are continually identified which require added training. **Imperial provides ongoing opportunities for those individuals who are looking to grow within the company/industry. In fact, most of our operations/field management started their careers as cleaners.**

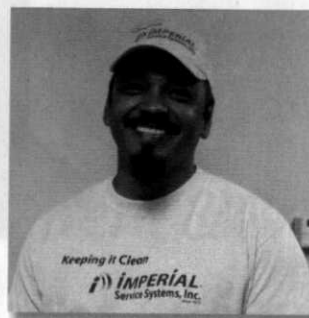
## **Imperial recruits custodians with experience**

Typically, when a new hire is made, the individual already has cleaning experience. This is because we recruit by networking within the custodial labor force. Our Area Managers have been in the business for a long time (typically 10 years or more) so they have many contacts within the industry. When one of these individuals is hired, he/she is then tested by the Area Manager regarding his/her specific knowledge and the techniques that they may use. The Area Manager will then add to that knowledge or adjust those techniques as needed, using the methods recommended by the Manufacturer.

## **Training of Field Management**

As stated previously, those in Field Management are also being trained and retrained on new methods, new equipment, and new chemicals which may be available as well as the old standbys. Periodic safety meetings are also a must.

## **Crews are Trained to Clean Your Specific Facility.**





# Environmentally Conscious

**IMPERIAL**  
Service Systems

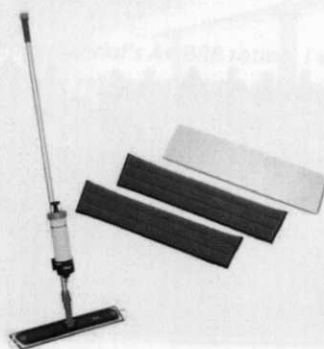
Green cleaning is defined as "Using non-toxic, ecofriendly products to help keep our environment healthy."

We're committed to customer satisfaction, protecting the environment (and people) and providing a performance while remaining fiscally responsible.

**"We do not inherit the land,  
we borrow it from our children."**

**— Native American Saying**

- CHEMICALS
- EQUIPMENT
- PROCEDURES



**Diversey**  
for a cleaner, healthier future™

# Full Service



Imperial provides comprehensive cleaning including these additional services your facility will need.

Carpet  
Cleaning

- Hot Water Extraction
- Dry Cleaning Method

Carpet  
Maintenance  
Programs

Vinyl Tile  
Terrazzo  
Ceramic

- Stripping
- Scrubbing
- Refinishing

Chemical Free Floor Stripping

Full Room/Area  
Disinfecting  
(flu/virus prevention)

Post  
Construction  
Final  
Clean

- Wall  
Washing

- Endeavor  
Total  
Restroom  
Cleaning &  
Disinfecting

- Power  
Washing

- Plant/  
Warehouse  
Floor  
Scrubbing/  
Sealing

**State of the Art Equipment & Procedures**

**We're All You'll Ever Need.**



**SECTION  
TWO  
2**

**Presenting a Plan Designed Specifically**

---

**Shorewood - Troy Public Library**

---

Prepared by the collective  
quality assurance team of



Included here you will find:

- ✓ Our Analysis of Your Facility
  - ✓ Our Game Plan for your Facility
  - ✓ Detailed "Customized" Specifications
-

# Guaranteed Smooth Transition: "The GST Plan"



Now there is no reason to delay improving your cleaning.

After you give us notification that we will be your new cleaning company (*and after we celebrate for a few minutes*), we will implement **"the GST Plan"**.

---

5-10 days before the start date:

**Crews are identified and assembled**

**A final pre-start walk-through with Area and Operations Management and your Quality Control inspector to make certain they are all totally familiar with your facilities before the start date. This will ensure a problem-free start.**

Day of start:

**The staff will be made familiar with your areas of concern and where our predecessor may have come up short.**

First night:

**The assigned on-site staff will be trained on the specific needs of your facilities.**

**A member of Imperial Operations Management will be present to assist.**

**Whenever possible, we will identify and execute a "WOW" issue.**

Morning after first night:

**One of our Quality Control specialists will do an inspection of the facility.**

## "The GST Plan"

• PREPARATION • EXECUTION • FOLLOW UP

---





## Shorewood - Troy Public Library

650 Deerwood Drive  
Shorewood, IL 60404

### ATTENTION OPERATIONS TEAM:

#### Areas to be Serviced:

Lobby & Entrances  
Main Library  
General Offices/Children's Room  
Private Offices  
Restrooms

Kitchen/Staff Lounge  
Hallways  
Stairs

Elevators  
Study Room  
Meeting Room/Reading Room  
Janitor's Closet  
Miscellaneous

#### Frequency of Service:

Three ( 3 ) Times Per Week  
Monday - Wednesday - Friday

**Classification:**  
Library

#### Levels:

Two ( 2 )

#### Access:

Front Entrance

#### Security:

Lock Doors/Set Alarm

#### Lights:

Turn On/Off As Necessary

#### Availability:

After 8:00 P.M. (Monday & Wednesday)  
After 5:00 P.M. (Friday)

#### Areas of Special Concern

Restrooms    Check for Cobwebs    Interior Glass    Disinfecting

#### Client Contact:

Lori Freeman  
lfreeman@shorewoodtroylibrary.org  
815.725.4510

#### Imperial Contact:

Customer Service  
(Available 24/7)  
630.925.1800  
Fax 630.925.1814  
www.imperservsys.com



**Routine tasks to be completed every day building is cleaned:**

- Empty trash from all waste baskets and replace liners. Empty recyclables from recycling containers. Damp wipe as needed. Remove waste to the dumpster and place recycling in appropriate containers. Empty and reline the outside containers.
- Dust all furniture tops in all areas, including computer workstations. Dust tops of computers and monitors but not screens or keyboards. Spot clean any spills or markings, especially in public areas and meeting rooms.
- Vacuum carpeting and pick up debris in all areas. Spot clean any spills according to the manufacturer's directions for the carpet
- Sweep and damp mop all uncarpeted areas, including public stairwells, according to the manufacturer's directions for the flooring
- Clean and sanitize water fountains
- Clean smudges from all surfaces in elevators, including doors, walls and ceilings
- Spot clean handprints on all interior doors, around door frames, around light switches, and all other areas
- Spot clean all glass entry doors and handprints on interior glass
- Damp wipe public stairway handrails
- Keep janitor closets neat and orderly
- Check for cobwebs

**Washrooms – Daily Tasks:**

- Clean and sanitize wash basins, urinals, and toilets
- Clean splash marks from partitions, walls, and doors
- Polish mirrors
- Clean and sanitize inside and outside of baby changing tables
- Refill dispensers with soap, toilet paper, and paper towels (to be supplied by Shorewood-Troy Library)
- Wash floors with disinfectant soap solution
- Empty waste receptacles and line

**Staff Lounge/Kitchen Area – Daily Tasks:**

- Wash counters, tables, seats, cabinet fronts, and the outside of appliances
- Spot clean garbage cans and spot wash walls, especially over countertops and near garbage cans
- Sweep and damp mop floor

**Weekly Tasks:**

- Dust office equipment, sills, ledges, baseboard trim, window ledges, molding, pictures, and wall hangings as high as can be reached from floor level
- Damp wipe all public tables
- Survey areas and clean by water extraction all carpet spills and spots

**Monthly Tasks:**

## Shorewood - Troy Public Library

- Thoroughly detail clean drinking fountains and washrooms, including washing stalls and scour hard water stains from sinks, toilets, and urinals.
- Vacuum under staff and public desks and workstations
- Perimeter vacuum edges, corners, under baseboards, etc.
- Dust blinds
- Thorough dusting of all book and AV shelves throughout the building

### Quarterly Tasks:

- High dust in all public and staff areas not reached in nightly cleaning, including tops of book stacks, tall cabinets, and door closers
- Vacuum all upholstered furniture
- Vacuum ceiling ventilation grills and hanging signs
- Vacuum light fixtures
- Detail clean all restrooms including completely wiping the walls, cleaning and seal all grout, and thoroughly cleaning all fixtures

### Yearly Task (to be scheduled in advance with Assistant Director):

- Clean all carpets according to manufacturer specifications

The cleaning company will provide the necessary supervision, equipment, and quality cleaning supplies required to maintain the facility.

### Janitor's Closets:

• Floors (hard surfaced)	Sweep	Weekly
• Equipment & Supplies	Damp Mop	Monthly
	Organize	Daily

### Miscellaneous:

- Report Building Problems Such as Toilets That Do Not Flush, Broken Windows, etc.
- b. Check for Cobwebs

Note: It is understood that if carpet spots cannot be removed by damp wiping with carpet cleaner and will require hot water extraction, this will be done at an additional charge. It is additionally understood that if a "spot" is cleaned on dirty carpet, a "clean spot" will result which can only be remedied by cleaning the entire area of dirty carpet.

Project Work: Quarterly (1<sup>st</sup> occurrence 3 months from start date)  
Semi-Annual (1<sup>st</sup> occurrence 6 months from start date)  
Annual (1<sup>st</sup> occurrence 12 months from start date)

# In Search of Value



What does IMPERIAL offer that the other guys won't spend the money to do?

- \_\_\_ **PROVEN "TIME TESTED" SYSTEM** (Since 1973)
- \_\_\_ **24-7-365 "LIVE"** (No Voicemail)
- \_\_\_ **QUICK EFFECTIVE RESPONSE** (Usually same day or sooner)
- \_\_\_ **DEPTH OF ORGANIZATION** (Experienced & Dedicated)
- \_\_\_ **REFERENCES** (As many as you want to see)
- \_\_\_ **REFERENCES** (Some dating back over 25 years)
- \_\_\_ **REFERENCES** (Similar to your facility/industry/area)
- \_\_\_ **DIVERSIFIED CUSTOMER BASE** (Not a niche contractor)
- \_\_\_ **30 DAY CANCELLATION** (Some companies will lock you in)
- \_\_\_ **EARNED TRUST** (based solely on Performance)
- \_\_\_ **LOCAL** (Our HQ & Branch Offices service their/Your area)
- \_\_\_ **NOT A FRANCHISE** (Let us explain the Franchise Folly)
- \_\_\_ **PRICED TO DO THE JOB RIGHT;** Not to just get a sale.  
(And our many Long-term relationships are proof)

*Not sure if you want to make a change (even if it's for the better)...*

The **GST PLAN** starts building the relationship even before we begin the quality cleaning, putting you at ease.

In Summary, **IMPERIAL IS THE BETTER VALUE.**





October 25th, 2023 - Revised

# Our Agreement

## AGREEMENT:

Between IMPERIAL SERVICE SYSTEMS, INC., hereinafter referred to as the Contractor and SHOREWOOD - TROY PUBLIC LIBRARY, hereinafter referred to as the Client. This is the entire agreement. It replaces all previous agreements, oral or written, between the two parties. Unless otherwise notified, Imperial Service Systems, Inc. has the right to post this business relationship on social media.

## SERVICE:

The Contractor agrees to furnish labor, equipment, cleaning materials and supervision necessary to provide the services being performed at Shorewood - Troy Public Library, 650 Deerwood Drive, Shorewood, IL 60404. The areas to be serviced includes all specified areas named.

Disposable supplies such as hand towels, soap, toilet tissue, trash can liners, etc., shall be provided by the Client. If Contractor provides disposable supplies at the request of the Client, it is understood that they will be provided at an extra cost. These prices are subject to change based upon prevailing costs.

Client shall provide a secure storage area for cleaning equipment and supplies solely accessible to IMPERIAL personnel and client management. Area is to be kept neat and clean.

## COST:

Total charges for specified services as read and agreed upon by Client and Contractor and enclosed within the proposal will be: \$1,565.00 per month

Providing there is no change in the scope of the work, minimum wage laws or government requirements, this price is guaranteed for twelve months. A yearly increase may vary. A 30-day notice will be provided prior to any increase. Periods of construction, renovation or other unusual occurrences which increase workload may require additional charges during such periods to compensate for the additional work required.

## TERM OF AGREEMENT:

It is the intention of this agreement that it remain in force, uninterrupted, to the satisfaction and best interest of both parties. In the event either party feels that cancellation is necessary for any reason, a 30-day notice must be filed via certified or registered mail and effective the date of mailing. Contractor may terminate services at any time for non-payment of invoices. All monies owed shall be paid in full at the time of termination.

## PERSONNEL:

The Client agrees that it may at no time during or for six months after termination of this agreement, hire, retain or employ on its own payroll or by contract basis through a 3<sup>rd</sup> party, directly or indirectly, any individual that is or has been employed by the Contractor, for the performance of janitorial tasks without the approval of the Contractor.

The Contractor assumes all financial responsibility (wages, withholding taxes, social security, sales and other taxes) directly related to the specified services.

## INSURANCE:

The Contractor agrees to furnish certificates of insurance prior to commencement of work, in the amount of \$1,000,000 General Liability, \$1,000,000 Worker's Compensation and \$10,000,000 Excess Liability.

## INVOICING:

Unless other arrangements have been made, invoicing shall be monthly on the 1<sup>st</sup> of the month that is being invoiced. Payment is due on the last day of said month. Failure to pay in a timely manner could result in a cancellation of the service. Contractor reserves the right to charge interest of 1½% per month on accounts over 60 days past due. If Client's account is referred to an agency or attorney for collection, attorney's fees and costs of collection shall be recoverable by Contractor.

## SHOREWOOD - TROY PUBLIC LIBRARY

Accepted by \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Starting Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

## IMPERIAL SERVICE SYSTEMS, INC.

Vito Cavallo

Vito Cavallo President

10 / 25 / 23

*This agreement has a Start Date but no ending date because we intend to be the Last janitorial service you'll ever need.*



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
2/24/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

**PRODUCER**  
Assurance, a Marsh & McLennan Agency LLC company  
20 N Martingale Road  
Suite 100  
Schaumburg IL 60173

**CONTACT**  
NAME: Alex Carlton  
PHONE (A/C, No, Ext): 847-463-7795 FAX (A/C, No): 847-440-9127  
E-MAIL ADDRESS: Alex.Carlton@MarshMMA.com

**INSURED**  
Imperial Service Systems, Inc.  
200 W. 22nd Street, Suite 201  
Lombard, IL 60148

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A: The Charter Oak Fire Insurance	25615
INSURER B: Hanover Insurance Co.	22292
INSURER C: Travelers Property Casualty Co	25674
INSURER D: Phoenix Insurance Company	25623
INSURER E:	
INSURER F:	

### COVERAGES

CERTIFICATE NUMBER: 1461875261

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			P-660-4F272111-COF-22	3/1/2022	3/1/2023	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$100,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			BA-2L912241-22-43-G	3/1/2022	3/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$0			CUP-3K263700-22-43	3/1/2022	3/1/2023	EACH OCCURRENCE \$10,000,000 AGGREGATE \$10,000,000 \$
D	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> Y <input type="checkbox"/> N	N/A	UB-2T547905-22-43-G	3/1/2022	3/1/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
B	Third Party Crime			BDC-H492836-01	1/31/2022	1/31/2023	Employee Theft Deductible Limit \$100,000 Ded. \$5,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

The following Proprietor/Partner/Executive Officer/Members are excluded from the Workers Compensation and Employers' Liability Policy: Vito Cavallo & Colleen Cavallo  
Proof of Insurance

### CERTIFICATE HOLDER

### CANCELLATION

\*Sample\*

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

*Line Poljak*



**Rob Held**

11:01 AM (1  
hour ago)

to me

Good Morning Director Mills,

While I am relatively new to the LaGrange Park Public Library, I am more than happy to assist with this.

1. Are you happy with the service that Imperial Cleaning provides?  
- Yes. On a whole, we are very happy with their services and are particularly extremely pleased with their customer service, most especially their customer service rep Aaliaha, who has been invaluable in addressing any concerns or changes in our service.
2. Are there any trouble areas that you've had to address with them?  
- We initially had some concerns that the service team was not placing the trash/recycles in the proper receptacles, but that was quickly worked out and resolved.
3. Have you had trouble getting in touch with a supervisor to address any larger issues?  
- While we have not been able to get in touch with a supervisor directly, we have been able to get in touch with their customer service, who in turn gets in touch with the cleaning crew supervisor before they return for the night.
4. Have they left your building securely locked if they clean when your building is closed to the public?  
- Even in our temporary space while our main location is being renovated, we have had no issues with them locking up after they are done for the day. I am usually the first person in on a day to day basis, and have had no issues with finding any entrance unlocked.
5. How long has LaGrange Public used them as a cleaning service?  
- I am uncertain of that, as I have only been in my position for the last 3 weeks (today marking the start of week 4), but I can get you that information later. I know that we have used them the entire time we have been in this temporary space, but believe that we were using them in our previous space as well.
6. Is there anything else that you would like to note about them?  
- Honestly, their customer service and willingness to expand their services (without any additional charges) has been second to none. From my limited experience with them, I would highly recommend them.

Kind regards,

--

--

Rob Held  
Facilities Coordinator  
La Grange Park Public Library  
(Temporary Address until approx. May 2024)  
21 N. Catherine Ave.  
La Grange, IL 60525

**Brett Haltom**

10:29 AM (1  
hour ago)

to me

Hello Jennie, so far our service from Imperial has been good, of course as with all contractors, we have had minor bumps, but hey have been fast to correct those, I usually contact, customer service via-email, with any issues, again they are fast to respond and correct. We are a 77,000 square foot facility, the crew we have has done a very good job, of hitting all the areas, to include high end dusting and sanitizing/cleaning the tables and hard surfaces. To date I believe I have had maybe three issues with the crews, setting off the alarm to the building, by accident.

I think they have held the cleaning contract, with us for the past, six years, maybe longer.

As with any cleaning service, there will be bugs to work out, in the beginning, we had them and Imperial has corrected them, to include replacing the crew, having an army of managers onsite to clean and train the new crews.

We are happy with their service.

Brett Haltom

Facilities Manager

Fremont Public Library

## COMPANY OVERVIEW

Since 1994, Buildingstars® has been delivering high quality facility services to customers in a variety of markets including office, medical, financial, and educational. Buildingstars® is expanding rapidly throughout the United States and is emerging as a leader in the industry. Our service is complete, consistent, courteous, and now environmentally-friendly through our **Greenstar** program!

### Qualifications

- Commercial cleaning company in greater St. Louis area since 1994, with offices in Chicago, Phoenix, Houston, Pittsburgh, New Jersey, Tampa, Charlotte, Austin, and Hudson Valley
- Service more than 2,000 customers including corporate, office, medical, financial, and educational institutions
- Comprehensive Facility Services—A single source for all facility service needs
- State-of-the-art Human Resources Program
- Proprietary Management Development Program called **Risingstar**
- Comprehensive Quality Control Program with a history of exceeding customer expectations

### Mission Statement

Provide safe, clean, and healthy work environments by attracting, training, and motivating the best people in the industry.

### Professional Memberships Include:

- Building Owners and Managers Association (BOMA)
- Building Service Contractors Association International (BSCAI)
- U.S. Green Building Council (USGBC)
- Association of Training and Development (ASTD)



## RISINGSTAR—OUR EMPLOYEE DEVELOPMENT AND TRAINING PROGRAM

We have created a proprietary Management Development and Training Program called Risingstar. This has allowed us to develop some of the best managers in the industry. It is a three stage process where everyone starts the program as a cleaning Technician—regardless of their work experience. They are required to complete a training program that focuses on health, safety, and the optimal way to clean a facility. The second stage requires working as an On-Site Manager, typically supervising a small staff of cleaning crew. In this stage, they are required to complete a training program that focuses on customer service, human resources, and facility supervision. The third stage of management is called the Corporate Stage. Corporate Stage Managers are required to complete a training program with focus on business planning, advanced cleaning techniques, process improvement, and overall facility management. Only the top 8% of those who begin the Risingstar Management Program qualify for the Corporate Management stage.

We allow our Corporate Managers to invest with our company through a franchise program. *But here is where we are different from other franchise programs—these managers have gone through three formal training programs over an average period of two years.* Most of our Corporate Managers have had management and industry experience even before they start the program. Our Corporate Managers are very motivated to do a good job because they have a vested interest. They are much more qualified than the average building supervisor or operations manager and they have the opportunity to earn much more. This combination helps us to attract some of the best managers in the industry!

\* A more detailed description of our training and management development process is available upon request.

**Inc.  
500**

**buildingstars**  
COMMERCIAL CLEANING SOLUTIONS

QUALITY CONTROL PROCESS

CLEANING SCHEDULE

SERVICE AGREEMENT

REFERENCES



## MANAGEMENT APPROACH

### Corporate Manager

Our approach to managing an account like yours is to make sure that we have a highly qualified and highly motivated Manager who is in your building on a nightly basis to make sure your facility is cleaned according to your expectations.

We call this key manager our Corporate Manager. Our Corporate Managers are highly qualified Managers with years of industry experience. They go through a management development program that takes 2 years on average and they are required to meet a series of performance standards along the way. In addition, they must successfully complete three formal training programs.

Our Corporate Managers are highly motivated. We have created an opportunity for our Corporate Managers to invest with Buildingstars®, which allows them to share in the profits. This is really the key – you have a manager who has made a serious commitment and has a vested interest in making sure our customers are happy.

Our Corporate Managers must meet a number of internal performance standards. However, there is none more important than overall customer satisfaction as measured by our customer retention rate.

*Our Corporate Managers average a customer retention rate of over 95%—much higher than the industry standard!*

### More Efficient Management Structure

The typical large cleaning company uses a management structure comprised of a supervisor to manage the cleaning personnel, an operations manager to make sure the supervisor is doing their job, and an area manager to make sure the operations manager is doing their job, and so on, until they have created several layers of management.

At Buildingstars®, we work from the premise that if you have someone managing the cleaning who is qualified, well trained, and motivated to do the job right every time, you don't need layers of management checking on each other. With our highly qualified, highly motivated Corporate Managers in place we have been able to avoid the need for multiple layers of management, resulting in a much more efficient and effective structure.

## QUALITY CONTROL PROCESS

Buildingstars® has developed a proprietary quality control process with the right blend of technology and human contact. It all starts with a clear understanding of our customer's expectations. That's why we take the first 30 days of service to develop a Customer Expectation Document. We understand that "customer" is a broad term that may include the property manager or facility manager, the tenants and the tenants' customers. Once the Customer Expectation Document is established, we monitor our performance against the standard, flag any gaps, then respond quickly to bring the performance back to the standard.

Our quality control process is proactive and intuitive. Through our experience of servicing literally thousands of facilities over the years, we are able to identify those areas that may become a concern, then recommend or implement steps to head off the problem before it develops.

The key to an effective quality control program is communication between everyone involved in the process and the willingness of Buildingstars® to do whatever it takes to meet customer expectations. At Buildingstars® our quality control program is an ongoing process towards a zero defect environment through a 4-step process.

- Clearly identify customer's (including tenants) expectations
- Develop a program to constantly monitor the level of performance
- Make necessary changes to track perfection
- Develop creative solutions to improve quality and create efficiencies

Features of our Quality Control Program Include:

- Assigning a Quality Control Manager, so you have a single contact who communicates with you on a regular basis
- Conducting both evening and day-time inspections
- Providing logbooks on site for communication with the crew
- Sending out quarterly email surveys
- Web based communication process utilizing smart phones and tablets
- Using database management to track service issues, response, and resolution times

*We are dedicated to resolving problems quickly.*

## SAFETY

Safety is an integral part of the Buildingstars® culture. We have developed a special program called **Safety Stars** that has helped to establish our safety culture.

Safety Stars is designed to prevent accidents and minimize risk. We use a proactive approach that includes comprehensive safety training and ongoing communication with safety incentives to reward those who go above and beyond industry standards.

Our Safety Stars program is led by a Qualified Safety Manager who works closely with our management team. This teamwork between our corporate staff, field managers, and service workers has led to measurable results that continue to improve:

- Buildingstars® workers' compensation Experience Modification Rate (the industry measure of employee injuries) has been below the industry standard since 2001
- Work related injuries as measured by the OSHA recordable incident rate have been almost non-existent and are significantly below the industry standard

All Buildingstars® employees, from the most senior management to the newest hire, are committed to maintaining a safe work environment for our customers.

The Safety Stars Program includes but is not limited to:

- Facility Specific Safety Objectives
- Safety Training
- Safety Communication
- OSHA Compliance
- Blood Borne Pathogens Exposure Control Plan
- HIPAA Training For Medical Facilities
- Injury Illness and Prevention Program (IIPP)
- Site Safety Audits
- Hazardous Assessments
- Motor Vehicle Record Check

## SECURITY

### Screening Process

In today's world, security is becoming increasingly more important. It starts with attracting ethical and responsible people. That's why we do an extensive background check on all of our service Technicians, On-Site Managers, and Corporate Managers.

### Employee Identification

All Buildingstars® employees who are in our customer's buildings wear Buildingstars apparel making them easy to identify. In addition, we communicate closely with our customers, letting them know who is in their building and if there are any personnel changes.

### Site Specific Security Plan

We have a well-developed security plan in place for each of our job sites. However, we realize that every organization is different and many have special requirements. So, before getting started, we will sit down with our customers to identify sensitive areas and unique requirements in order to develop a customized security plan.

You will have the peace of mind knowing that your building is secure—not only while we are in your building—but after we leave for the night.

### The Site Specific Security Plan may include:

- Comprehensive background check on all personnel
- Clearly identifiable apparel with ID badges
- Focus on keeping doors locked during trash removal
- After hours communication plan with specific customer contact
- Use of internal code system to identify all alarms, keys, and key cards

## TRANSITION PLAN

We develop a well thought out plan to ensure a seamless transition. We spend the time thinking through all the details so that you don't have to.

### PHASE I

#### **Develop Outline**

Meet with key customer contact to develop a Transition Plan Outline highlighting key action steps with appropriate timeline.

#### **Interview all key tenants and key personnel**

Meet with key customer personnel and/or tenants to review unique cleaning and supply requirements, work schedules, security issues, and any other relevant information.

#### **Order necessary equipment and supplies**

Make decision on how paper, trash liners, and hand soap supplies are managed, take inventory if necessary, design a plan to set up storage and janitor closets, order all keys, alarm codes, and key cards, if used.

### PHASE II

#### **Develop facility-specific operations manual**

After we have acquired all facility-specific information from key customer personnel and tenants, we will develop a "facility-specific operations manual" that will include a site security plan, a customized cleaning schedule with adjustments to reflect unique cleaning requirements, and unique cleaning times. We set up a communication plan that includes the key parties both during and after business hours, details such as policy on throwing out boxes, key reports, inspection times, a quality control plan, and various other details specific to the operation and cleaning of your facility.

#### **Assign and schedule staff**

We will develop a customized work schedule for every service worker and supervisor assigned to your facility. Each work schedule will include specific tasks, frequency of tasks, and estimated times of completion. These work schedules will be used to develop site-specific inspection forms, a quality control software program, and employee specific evaluation forms that will be available for review with key customer contacts.



## PHASE III

### **Implement transition day**

The focus of this day is to make sure we have possession of all necessary keys, alarm codes, and key cards, and where they are all used. It may require a walkthrough of the facility to discuss these and any additional special requirements. Also, we want to make sure we have a starting inventory of consumable supplies such as paper, trash liners, and hand soap, etc. In addition, we want to set up the janitor closets with all necessary equipment and cleaning supplies, a communication station that includes MSD sheets and employ specific work schedules. If time permits, we like to clean and organize the janitor closets and in some cases install chemical dispensing units. We realize that certain things may be out of our control, such as when the previous cleaning company returns keys, when they remove their equipment, what inventory of consumable supplies will be left, if any, and when we will have access to the janitor closets. That's why we start the process at the first possible opportunity and prepare to stay flexible throughout the day.

## PHASE IV

### **Perform first inspections**

A morning inspection will be performed by the Corporate Manager and Site Supervisor. If their time permits, we encourage any key customer contacts to join in. If not, we will discuss our results, along with any issues or changes that need to be made in order to meet customer expectations.

### **Implement a quality control plan**

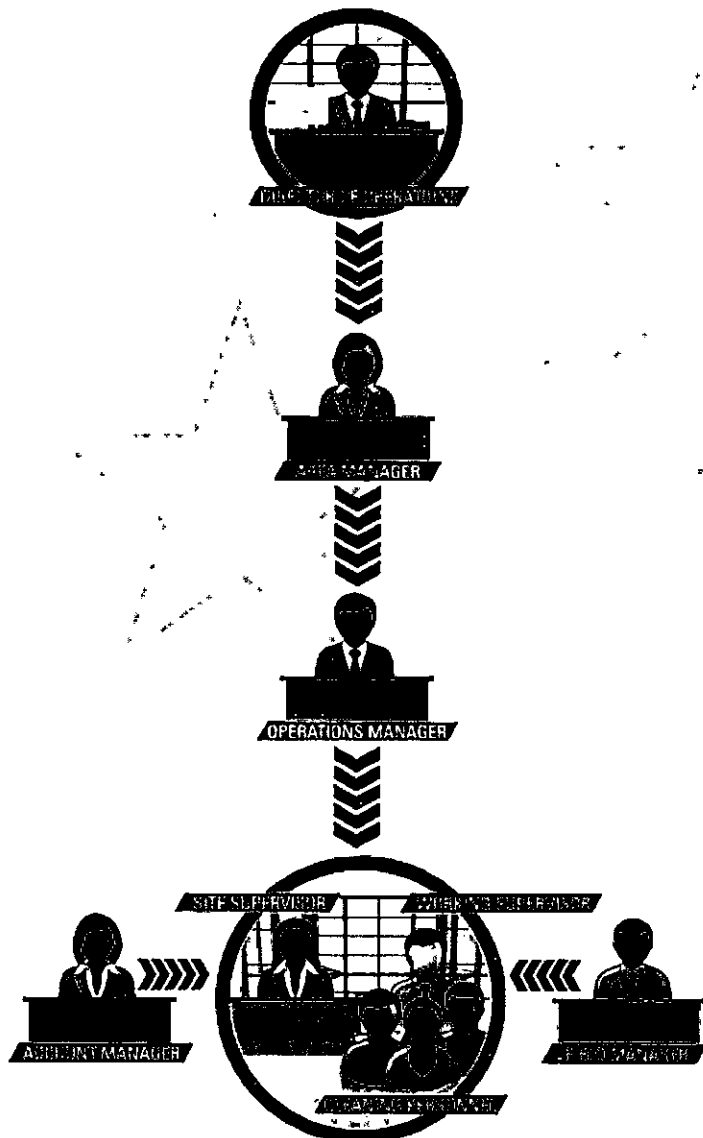
We will deliver a written quality control plan that will include an inspection schedule, a site specific software program, a communication plan, key employee contacts and/or tenants, and problem resolution procedures.

## Organizational Chart

Our Corporate Managers typically manage between 1020 cleaning employees, including supervisors. This makes their supervisor-to-employee ratio very low, allowing them to have a real impact on the quality of your cleaning service.

As you can see from the illustrated comparison of the Buildingstars® organizational chart to the traditional cleaning company, we have eliminated the need for multiple layers of management, creating a *much more efficient* management structure.

### TRADITIONAL COMPANY



Buildingstars® has eliminated the need for multiple layers of management, creating a *much more efficient* and *streamlined* management structure.

### BUILDINGSTARS



**buildingstars**

COMMERCIAL CLEANING SOLUTIONS

CLEANING SCHEDULE

SERVICE AGREEMENT

REFERENCES

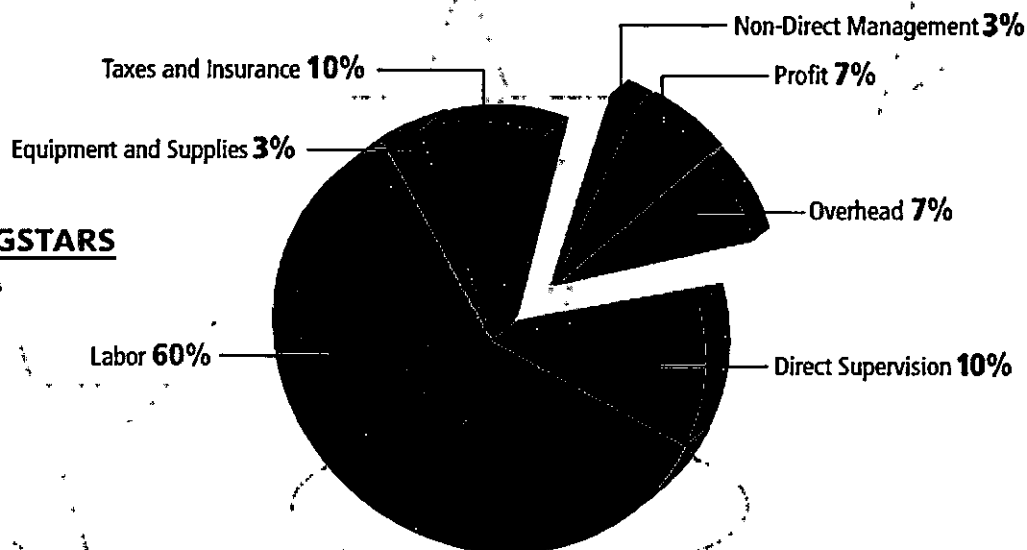
## Allocation of the Cleaning Dollar

At Buildingstars® we have developed the slogan "Put the money in your building—not ours!"

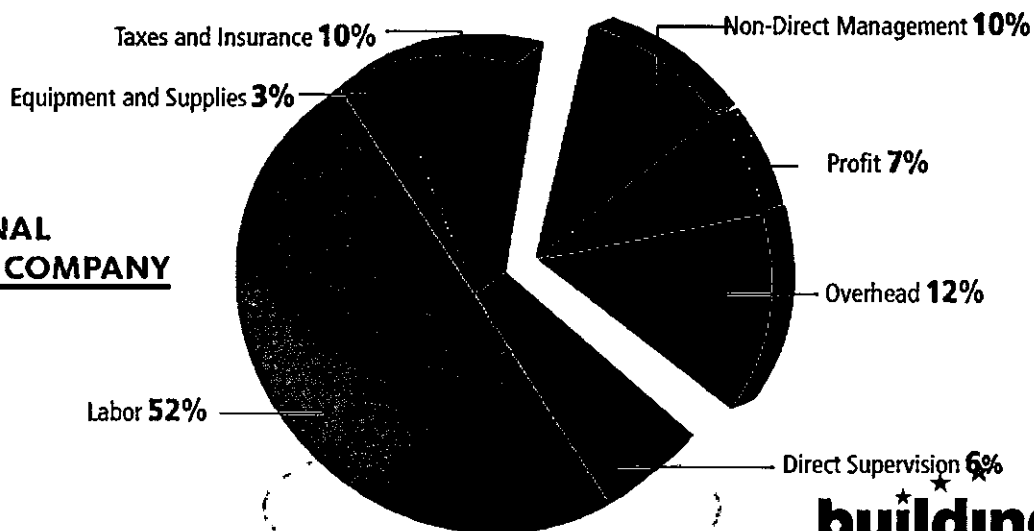
By eliminating layers of management along with the associated overhead costs, we have been able to allocate these savings directly into our customer's building!

Here's how it breaks down: A full 83% of our customer's cleaning dollar goes into those costs directly related to keeping their building clean—that compares to 71% with the typical cleaning company. So, we take that additional 12% and allocate it towards the compensation of those people in your building managing and performing the cleaning on a nightly basis.

### BUILDINGSTARS



### TRADITIONAL CLEANING COMPANY



**buildingstars**  
COMMERCIAL CLEANING SOLUTIONS

## Incentive Program for our Service Workers

The additional 12% has allowed us to create a great compensation and incentive program for our service workers. Here is how it works:

We pay a base dollar amount that increases periodically based on performance.

We pay a monthly bonus based on:

- Completion of initial and periodic training programs
- Performance of required cleaning tasks to meet customer expectations
- Professional conduct and appearance in customer's facility
- Attendance and punctuality
- Communication with Corporate Manager

We offer a \$100 referral fee to current Service Workers for each new Service Worker that becomes part of our team.

In addition to the various financial incentives, we are constantly looking for ways to recognize our people for a job well done.

We are able to attract a higher quality Service Worker by offering a higher wage and keep them motivated through our incentive and recognition programs. Average compensation for service workers is \$2-\$4 an hour above the industry standard.

## Commonly Neglected Areas Within Commercial Facilities:

### - MAIN BATHROOM TOWEL DISPENSERS -

From which previously cleaned hands of current employees may become re-contaminated due to dirtied/unsanitized dispensers:

Neglected dried, Crusted & Bio-hazard buildup on your bathroom dispensers & light switches may also contain harmful / transferrable pathogens, viruses & bacteria -- such as E.coli, Salmonella, & Sars Covid-19.

### - FACILITY KITCHEN -

From which previously cleaned hands of current employees entering room for lunch breaks may become re-contaminated due to dirtied/unsanitized high-touch points:

Neglected residues on all touch points & water cooler drinking spouts may also contain harmful / transferrable pathogens, viruses & bacteria -- such as E.coli, Salmonella, & Sars Covid-19.

### - BUILDING FLOORS -

Neglected dirt buildup on the majority of your building's floors & baseboards are indicative of floors continually being mopped with dirty water.

With Buildingstars, ALL these high-touch point areas & areas of first impressions will always be well-maintained and sanitized, all as part of our already Standard Cleaning Schedule:



# CLEANING SCHEDULE

for

## SHOREWOOD TROY PUBLIC LIBRARY

### SERVICE AREA

### FREQUENCY

#### Entrance, Lobby, Reception, Common Areas & Hallways

- ☐ Empty trash, spot clean containers and replace liners as needed - INCLUDING  
☐ OUTSIDE ENTRANCE TRASH RECEPTACLES Per Visit
- ☐ Vacuum carpeting, mats and runners. Per Visit
- ☐ Sweep and mop hard surface floors using  
 Floor Solvents with CLEAN WATER ONLY. Per Visit
- ☐ Clean interior glass - INCLUDING ENTRY DOORS Per Visit
- ☐ Clean reception desk & reception side tables. Per Visit
- ☐ Clean and polish drinking fountains. Per Visit
- ☐ Wipe and sanitize BOOK DROPS, tables, ledges and  
all horizontal surfaces. Per Visit
- ☐ Spot clean doors and switch plates. Per Visit
- ☐ Dust windowsills, picture frames, shelves and all other horizontal surfaces. Per Visit
- ☐ Clean interior glass - INCLUDING EXTERIOR OF FISH TANK Weekly
- ☐ High dust areas including vents, blinds and door frames. Monthly
- ☐ Low dust areas including chair legs and table legs. Monthly
- ☐ Wipe and sanitize telephones. Monthly
- ☐ Wipe vinyl/leather furniture. Monthly
- ☐ Dust baseboards. Quarterly

**Private Offices. ADULT SERVICES OFFICE. Cubicles/Workstations, Copy Areas & Conference Rooms**

- ☐ Empty trash, spot clean containers and replace liners as needed.
- ☐ Empty recycle receptacles; remove to designated disposal area.
- ☐ Clean interior glass
- ☐ Vacuum all carpeting.
- ☐ Sweep and mop hard surface floors using

Per Visit

Per Visit

Per Visit

Per Visit

**Floor Solvents with CLEAN WATER ONLY**

- ☐ High and low dust ceiling and floor corners to remove cobwebs.
- ☐ Clean and sanitize tables, ledges and countertops.
- ☐ Sanitize front of **Coffee Maker, including COFFEE SPOUTS**
- ☐ Spot clean doors and switch plates.

Per Visit

Per Visit

Per Visit

Per Visit

Per Visit

**Dust/WIPE/SANITIZE Copier KEY PADS**

**PER VISIT**

- ☐ Damp wipe desktops, if cleared off, on a designated night.
- ☐ Dust edges and shelves of cubicles.
- ☐ Dust all office equipment.
- ☐ Dust all windowsills, picture frames, file cabinets, shelves, etc.
- ☐ Dust all computer monitors and keyboards.
- ☐ High dust areas including vents, blinds and door frames.
- ☐ Low dust areas including chair legs and table legs.
- ☐ Wipe and sanitize telephones.
- ☐ Vacuum upholstered furniture.
- ☐ Wipe vinyl/leather furniture.
- ☐ Dust baseboards.

Weekly

Weekly

Weekly

Weekly

Weekly

Monthly

Monthly

Monthly

Monthly

Monthly

Quarterly

**buildingstars**  
COMMERCIAL CLEANING SOLUTIONS

SERVICE AGREEMENT

REFERENCES

## KITCHENS, Break Rooms & Coffee Bars

- |  |           |
|--|-----------|
| <input type="checkbox"/> Empty trash, spot clean containers and replace liners as needed.  | Per Visit |
| <input type="checkbox"/> Empty recycle receptacles; remove to designated disposal area.  | Per Visit |
| <input type="checkbox"/> <u>Sanitize touchpoints: door, refrigerator and microwave handles.</u>  | Per Visit |
| <input type="checkbox"/> Clean and straighten coffee areas.  | Per Visit |
| <input type="checkbox"/> Clean and disinfect tables and countertops.   | Per Visit |
| <input type="checkbox"/> <u>WIPE UNDER ALL paper towel dispensers;</u>   | Per Visit |
| <input type="checkbox"/> <u>Clean, disinfect and polish sinks;</u>   | Per Visit |
| <input type="checkbox"/> Clean front of <b>water cooler &amp; Coffee Maker, including</b><br><b>UNDER WATER &amp; COFFEE SPOUTS,</b> and refrigerator handles. | Per Visit |
| <input type="checkbox"/> Sanitize touchpoints: <b>Vending Machine dispensers &amp; buttons,</b><br><b>WATER DISPENSER spouts &amp; these machine exteriors</b> | Per Visit |
| <input type="checkbox"/> Spot clean walls, doors and switch plates.  | Per Visit |
| <input type="checkbox"/> Clean microwave(s); inside and out.   | Per Visit |
| <input type="checkbox"/> Sweep and mop hard surface floors using<br><b>DISINFECTANT Floor Solvents with CLEAN WATER ONLY.</b>                                  | Per Visit |
| <input type="checkbox"/> Wipe cabinet exteriors.   | Per Visit |
| <input type="checkbox"/> Wipe exterior of all appliances.  | Per Visit |
| <input type="checkbox"/> Polish all stainless steel.   | Per Visit |
| <input type="checkbox"/> Dust top of refrigerator(s).  | Per Visit |
| <input type="checkbox"/> Wipe down chairs.   | Per Visit |

## Restrooms

- ☐ Clean and disinfect toilet bowls, toilet seats, and urinals.

Per Visit

- ☐ Scour and disinfect sinks and polish fixtures.

Per Visit

- ☐ Clean and disinfect countertops and

### WIPE UNDER ALL PAPER DISPENSERS

Per Visit

- ☐ Clean mirrors.

Per Visit

- ☐ Empty trash, spot clean container and replace liners.

Per Visit

- ☐ Polish all chrome and stainless steel.

Per Visit

- ☐ Spot clean walls, doors and light switch plates.

Per Visit

- ☐ Wipe cabinet exteriors.

Per Visit

- ☐ Restock restrooms with supplies.

Per Visit

- ☐ Dust vents and horizontal surfaces.

Per Visit

- ☐ Sweep and mop hard surface floors using

**DISINFECTANT Floor Solvents with CLEAN WATER ONLY.**

Per Visit

- ☐ Clean partitions.

Per Visit

- ☐ **DRAIN SANITATION UPKEEP -**

**(Using An Insecticide Solvent Due To Flies)**

**BI-MONTHLY**

SERVICE AGREEMENT

REFERENCES

### Stairwells

- ☐ Sweep and mop hard surface floors using  
Floor Solvents with CLEAN WATER ONLY

Per Visit

- ☐ Police stairwells for trash.
- ☐ Vacuum carpeting; including mats.
- ☐ Dust handrails and supports.

Per Visit

Per Visit

Per Visit

### Elevators

- ☐ Sweep and mop hard surface floors using  
Floor Solvents with CLEAN WATER ONLY

Per Visit

- ☐ Vacuum carpeted areas.
- ☐ Vacuum and polish elevator tracks.
- ☐ Clean and wipe elevator cabs.
- ☐ Clean and sanitize keypads.

Per Visit

Per Visit

Per Visit

Per Visit

### Janitorial Closets & Storage Areas

- ☐ Clean utility sink.
- ☐ Maintain equipment and supplies in a neat and orderly fashion.
- ☐ Remove trash and empty boxes.
- ☐ Sweep and mop floors.

Per Visit

Per Visit

Per Visit

Per Visit



### **ADDITIONAL SERVICES AVAILABLE FROM BUILDINGSTARS**

- ☐ Total restroom management with dispenser automation
- ☐ Carpet cleaning
- ☐ Window cleaning
- ☐ Warehouse scrubbing
- ☐ Stripping and Refinishing (floor waxing)
- ☐ Initial cleans / Impact cleans
- ☐ Construction clean-ups
- ☐ Emergency clean-ups
- ☐ Light bulb changing
- ☐ Dust and debris removal from light fixture covers
- ☐ Inventory, order & source paper supplies

## BUILDINGSTARS SERVICE AGREEMENT

### PERFORMANCE OF SERVICES.

1. Buildingstars shall perform the Cleaning Services described herein at the following location:

**SHOREWOOD TROY LIBRARY at 650 Deerwood Dr, Shorewood IL 60404.** ("Customer"). The premises at this location making up the working area under this Agreement ("Areas Serviced") are further defined in the cleaning schedule, attached hereto and by this reference made a part of this Agreement ("Cleaning Schedule"). Buildingstars agrees to furnish all necessary equipment, tools, and cleaning supplies. The Customer shall provide, at its cost, consumable supplies such as: toilet tissue, hand towels, trash can liners and soap.

**PAYMENT.** 2.1. Customer shall pay to Buildingstars in full the amount set forth on the invoice within 15 days of the invoice date. Invoices over 15 days past due shall accrue interest at the rate of 1.5% per month until paid. Customers serviced 5 times per week or more shall pay for the six major Holidays (or days designated as Holidays): New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas Day. There shall be no service rendered on these days nor will there be any credit on Customer's invoice for these Holidays. If Customer requests services to be provided on any of these Holidays, Customer will be charged double the regular rate for the Holiday.

2.2 In the event any substantial changes are made to the Areas Serviced, the rates for Buildingstars services shall be increased accordingly, and Customer agrees to pay such increase. In the event it shall become necessary for Buildingstars to clean up after or during construction, remodeling, vandalism, burglary, or after any other activity not normally conducted on the Areas Serviced, Customer shall be charged and agrees to pay additional amounts.

2.3 In the event payment of an invoice is not received within 30 days from the date such payment is due, Buildingstars may suspend services to Customer until such payment is received. Applicable sales or service taxes will be added to the invoice, where required.

**TERM.** 3.1. The term of this Agreement shall be for one (1) year from the date this agreement is signed, and shall be automatically extended and renewed for additional one (1) year periods on each anniversary date on the same terms and conditions, unless either party shall give written notice by overnight or certified mail of termination at least 30 days prior to such anniversary date. If timely notice is given for termination, this Agreement shall expire at midnight on the anniversary date. Buildingstars shall have the right to immediately terminate this Agreement for Customer's breach of this Agreement, and Customer shall have the right to terminate this Agreement for "Non-Performance," which is defined as Buildingstars' failure, neglect, or refusal to perform any item as outlined in the Cleaning Schedule which is not cured within thirty (30) days after receipt of written notice thereof sent by overnight or certified mail, which notice shall specify, in detail, the nature of the Non-Performance.

3.2. In the event Customer terminates this Agreement for any reason other than Non-Performance, Customer agrees to immediately pay an amount equal to 50% of the total minimum sum stated in the Pricing Schedule multiplied by the number of full months remaining under this Agreement. The parties acknowledge and agree that such sum constitutes the parties' good faith estimate of Buildingstars' net damages for Customer's termination.

**GENERAL.** 4.1. Buildingstars shall not incur any liability for failure to provide services hereunder or prevented by Act of God, fire, strike, riot, war, or any other cause beyond Buildingstars' control. Buildingstars shall not be responsible for loss of Customer's property if placed in or on top of waste containers. Customer hereby agrees to hold Buildingstars and its assigns harmless from any and all liability resulting from any Buildingstars personnel's, or its assigns personnel's, exposure to hazardous or harmful materials, or dangerous conditions.

4.2 This Agreement constitutes the sole and entire agreement between the parties, which may only be modified in writing. Buildingstars has the right to assign this Agreement, or any or all of its rights or obligations under this Agreement including, but not limited to, its cleaning obligations, to any of its franchisees.

4.3 If Buildingstars incurs any attorneys' fees or other expenses in collecting the payment of fees or seeking enforcement of this Agreement, Customer shall be responsible for paying Buildingstars its reasonable costs and expenses (including, but not limited to attorneys' fees) thereby incurred. This Agreement shall be construed, governed, and enforced in accordance with the laws of the State of Missouri. Any legal action with respect to this Agreement shall be brought in the State courts of Missouri.

4.4 Customer agrees that during the term of this Agreement, and within 180 days after termination or expiration, Customer will not employ or hire any employees, agents, or representatives of Buildingstars or Buildingstars' franchisees to perform Cleaning Services without the express written consent of Buildingstars.

**Pricing Schedule:**

13,677 S.F. FACILITY SERVICED:

**3 TIMES PER WEEK FOR A CHARGE OF: \$1,495 MONTHLY**  
**{APX \$124.58 PER SERVICE VISIT - APX 12 SERVICE VISITS PER MONTH}**  
**{INCLUDES NECESSARY CLEANING EQUIPMENT + ALL SOLVENTS + DISINFECTANTS}**

RATES ARE BASED ON WEEKDAY CLEANING ARRIVAL TO BE ANYTIME AFTER 5 AM  
CLEANING DEPARTURE ANYTIME BEFORE 5 AM — AND ON WEEKENDS CLEANING ARRIVAL  
DEPARTURE TO BE ANYTIME

STANDARD CLEANING SCHEDULE HAS BEEN MODIFIED TO ACCOMMODATE SCHEDULED  
REQUESTS

COMPLETING THE BELOW SIGNATURE BOXES SIGNIFIES CLIENT IS IN FULL AGREEMENT  
TO THE OBTAINED SQUARE FOOTAGE, CLEANING SCOPE & RATES THEREIN INDICATED WITHIN  
THIS SERVICE RATE BOX

Customer Signature:	Signature:
Print Name:	Print Name:
Date:	Date:

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
12/02/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURERS(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

**PRODUCER**  
Lockton Affinity, LLC  
Administered By Lockton Affinity  
P.O. Box 410679  
Kansas City, MO 64141-0679

**CONTACT NAME**  
**PHONE (A/C No./Ext):** 800-829-0918 **FAX (A/C, No):** 913-652-7699  
**E-MAIL ADDRESS:**

INSURER(S) AFFORDING COVERAGE	NAIC
INSURER-A: Nova Casualty Co	42552
INSURER-B: Service American Indemnity Company	39162
INSURER-C:	
INSURER-D:	
INSURER-E:	
INSURER-F:	

**INSURED**  
Buildingstars Operations, Inc.;  
Buildingstars Management, Inc.  
33 Worthington Access Drive  
Maryland Heights, MO 63043

## COVERAGES

**CERTIFICATE NUMBER:**

**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT, WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INS R LTR	TYPE OF INSURANCE	ADDL INSR	SUBR NO	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY			LJR-ML-10000022-01	12/05/2022	12/05/2023	EACH OCCURRENCE \$ 1,000,000
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000
	CLAIMS MADE <input checked="" type="checkbox"/> OCCUR						MED EXP (Any one person) \$ 10,000
							PERSONAL & ADV INJURY \$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$ 2,000,000
	<input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO- JECT <input type="checkbox"/> LOC						PRODUCTS - COMP/OP AGG \$ 2,000,000
							\$
A	AUTOMOBILE LIABILITY			LJR-ML-10000022-01	12/05/2022	12/05/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per Person) \$
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident) \$
	<input checked="" type="checkbox"/> HIRED AUTOS						PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS						
	<input checked="" type="checkbox"/> NON-OWNED AUTOS						
A	UMBRELLA LIAB			LJR-UM-10000008-01	12/05/2022	12/05/2023	EACH OCCURRENCE \$ 5,000,000
	EXCESS LIAB						AGGREGATE \$ 5,000,000
	DED <input checked="" type="checkbox"/> RETENTION \$10,000						
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			SATIS0476501	12/05/2022	12/05/2023	PER STATUTE <input checked="" type="checkbox"/> OTHER
	ANY PROPRIETOR/PARTNER/EXECUTIVE Y/N						E.L. EACH ACCIDENT \$ 1,000,000
	OFFICER/MEMBER EXCLUDED? (MANDATORY IN NH)						E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
	If yes, describe under						E.L. DISEASE - POLICY LIMIT \$ 1,000,000
	DESCRIPTION OF OPERATIONS below						
A	Employee Theft of Clients Property			LJR-ML-10000022-01	12/05/2022	12/05/2023	Limit \$250,000
							Deductible \$1,000

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES (Attached ACCORD 101, Additional Remarks Schedule, if more space is required)

Insurer C: Crime Policy; The Hanover Insurance Company; Policy #BDB-D770863-04 eff 12/5/2022 - 12/5/2023 Client Property: Limit: \$1,000,000 Retentions: \$5,000

## CERTIFICATE HOLDER

## CANCELLATION

1136248

Proof of Coverage

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS

AUTHORIZED REPRESENTATIVE

*Paul D. O'Farrell*

ACORD 25 (2010/05)

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★ ★  
**buildingstars**  
COMMERCIAL CLEANING SOLUTIONS

## BUILDINGSTARS REFERENCES OF CURRENT *HIGH-TRAFFIC* CLIENTS

### ★ FROZEN FOODS EXPRESS (FFE):

- ★ ADDRESS: 16100 103rd St, Lemont IL 60439
- ★ MANAGER: WILLIAM (BILL) BOWES
- ★ PHONE: (708) 430-1790
- ★ EMAIL: wbowes@ffex.net

### ★ WILSON MANAGEMENT - Owner of a 3-Story Facility

- ★ ADDRESS: 350 E Ogden Ave, Westmont IL 60559
- ★ OWNER: Scott Wilson
- ★ PHONE: (630) 915-8212
- ★ EMAIL: swilson@thewilsoncompanies.com

### ★ BY YOUR SIDE - AUTISM SERVICES:

- ADDRESS: 23909 West Renwick Rd., Plainfield IL 60544
- OFFICE MANAGER: Christine Healy
- PHONE: 779-234-9583
- EMAIL: chealy@byyoursideac.com

### ★ CROSSROADS COMMUNITY CHURCH:

- 3003 S Eola Rd, Aurora IL 60503
- MANAGER: CINDY DEIMERT
- PHONE: (630) 512-1568
- EMAIL: cdeimert@crossroadsconnect.net

# ◆COSMOPOLITAN◆

## BUILDING SERVICES

SINCE 1986

Janitorial Service Estimate

**SHOREWOOD TROY PUBLIC LIBRARY**  
**650 Deerwood Drive | Shorewood IL 60404**



# ◆COSMOPOLITAN◆

## BUILDING SERVICES

SINCE 1986

Mrs. Lori Freeman

Shorewood Troy Public Library

650 Deerwood Drive | Shorewood IL 60404

Cosmopolitan Maintenance and Building Services Inc. is a family-owned business, have been present on the market for over 30 years. We are an experienced and professional cleaning company with expertise in providing high quality services that meet our clients' diverse needs. We understand that each company we serve has different janitorial needs and budgets, and we pride ourselves on our ability to provide service that meets both.

Cosmopolitan is proud to start providing janitorial services to the following public libraries: New Lenox Public Library | New Lenox, Acorn Public Library | Oak Forest, Thomas Ford Memorial Public Library | Western Springs, Palos Heights Public Library | Palos Heights, Forest Park Public Library | Forest Park.

Cosmopolitan provides other janitorial services that might be utilized at your site: window washing, carpet shampoo and stain treatment, machine floor scrubbing, buffing, stripping and wax coating.

Cosmopolitan provides emergency services. Cosmopolitan does random quality assurance visits and is available to discuss any questions, concerns with the site manager at that time. Also, Cosmopolitan for the convenience of client we supply consumables and bill as needed. Our supplier is a local firm called Warehouse Direct. We monitor consumable usage and supply accordingly.

We look forward to servicing Shorewood Troy Public Library.

**Routine tasks to be completed every day building is cleaned:**

- Empty trash from all waste baskets and replace liners. Empty recyclables from recycling containers. Damp wipe as needed. Remove waste to the dumpster and place recycling in appropriate containers. Empty and reline the outside containers
- Dust all furniture tops in all areas, including computer workstations. Dust tops of computers and monitors but not screens or keyboards. Spot clean any spills or markings, especially in public areas and meeting rooms
- Vacuum carpeting and pick up debris in all areas. Spot clean any spills according to the manufacturer's directions for the carpet
- Sweep and damp mop all uncarpeted areas, including public stairwells, according to the manufacturer's directions for the flooring
- Clean and sanitize water fountains
- Clean smudges from all surfaces in elevators, including doors, walls and ceilings
- Spot clean handprints on all interior doors, around door frames, around light switches, and all other areas
- Spot clean all glass entry doors and handprints on interior glass
- Damp wipe public stairway handrails
- Keep janitor closets neat and orderly

**Washrooms - Daily Tasks:**

- Clean and sanitize wash basins, urinals, and toilets
- Clean splash marks from partitions, walls, and doors
- Polish mirrors
- Clean and sanitize inside and outside of baby changing tables
- Refill dispenser with soap, toilet paper, and paper towels ( to be supplied by Shorewood- Troy Library )
- Wash floors with disinfectant soap solution
- Empty waste receptacles and line

**Staff Lounge/Kitchen Area – Daily Tasks:**

- Wash counters, tables, seats, cabinet fronts, and the outside of appliances
- Spot clean garbage cans and spot wash walls, especially over countertops and near garbage cans
- Sweep and damp mop floor

**Weekly Tasks:**

- Dust office equipment, sills, ledges, baseboard trim, window ledges, moldings, pictures, and wall hangings high as can be reached from floor level
- Damp wipe all public tables
- Survey areas and clean by water extraction all carpet spills and spots

**Monthly Tasks:**

- Thoroughly detail clean drinking fountains and washrooms, including washing stalls and scouring hard water stains from sinks, toilets, and urinals
- Vacuum under staff and public desks and workstations
- Perimeter vacuum edges, corners, under baseboards, etc.
- Dust blinds
- Thorough dusting of all book and AV shelves throughout the building

**Quarterly Tasks:**

- High dust in all public and staff areas not reached in nightly cleaning, including tops of book stacks, tall cabinets, and door closers
- Vacuum all upholstered furniture
- Vacuum ceiling ventilation grills and hanging signs
- Vacuum light fixtures
- Detail clean all restrooms including completely wiping the walls, cleaning and seal all grout, and thoroughly cleaning all fixtures

**Yearly Tasks (to be scheduled in advance with Assistant Director):**

- Clean all carpets according to manufactures specifications

**The cleaning company will provide the necessary supervision, equipment, and quality cleaning supplies required to maintain the facility.**



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/02/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> TW Group, Inc. 850 North Cass Ave.  Westmont IL 60559	<b>CONTACT NAME:</b> Vivian Short <b>PHONE (A/C, No, Ext):</b> (630) 737-0300 <b>E-MAIL ADDRESS:</b> vivians@twgroupinc.com <b>FAX (A/C, No):</b> (630) 737-0335
<b>INSURED</b> Cosmopolitan Cleaning & Maintenance Services Inc. 1590 W Algonquin Rd Hoffman Estates IL 60192 Document Code:5C82ACABEFC22399108241	<b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Mesa Underwriters Spec. Ins CO GA:RT Specialty <b>INSURER B:</b> NCCI-Travelers Insurance <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>

**COVERAGES** **CERTIFICATE NUMBER:** CL2372738063 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			MP0012009001178	10/14/2022	10/14/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ Included \$
	<input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<input checked="" type="checkbox"/> <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y/N <input checked="" type="checkbox"/> Y N/A						<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES** (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Certificate Holder is named as an Additional Insured, on a Primary & Non-Contributory basis and Waiver of Subrogation applies, if required by written contract or written agreement subject to the above General Liability policy provisions per endorsement MUS0101 20127 0316.  
Workers Compensation Exclusion in favor of Katharina Pieprzyk.

**CERTIFICATE HOLDER****CANCELLATION**

Shorewood Troy Public library 650 Deerwood Dr  Shorewood IL 60404	<b>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</b>  <b>AUTHORIZED REPRESENTATIVE</b> 
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# ◆ COSMOPOLITAN ◆

## BUILDING SERVICES

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SINCE 1986

### **Monthly Janitorial Service Cost**

Shorewood Troy Public Library  
650 Deerwood Drive | Shorewood IL 60404

Janitorial Service Monday, Wednesday, Friday \$1,875.00  
(All cleaning tasks: daily, weekly, monthly, quarterly, annually attached to the estimate,  
provided by the management of the library)

Estimate Includes Commercial Cleaning Supplies, Cleaning Equipment, and Labor.

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Cosmopolitan Building Services, Inc.

Janitorial Service Agreement

**Shorewood Troy Public Library**  
650 Deerwood Drive | Shorewood IL 60404

1. Cosmopolitan Building Services, Inc. an Illinois Corporation, hereinafter referred to as Cosmopolitan, agrees to provide Janitorial Services three (3) times per week Monday, Wednesday, Friday excluding national holidays (Christmas, New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day) to **Shorewood-Troy Public Library** (hereinafter referred to as "Client").

2. Cosmopolitan shall provide all labor as well as pay taxes and insurance necessary to complete the work described on the Client's Specifications except for restroom expendables and plastic liners. Cleaning supplies and equipment will be provided by Cosmopolitan.

3. The term of this Maintenance Agreement shall be one (1) year, commencing from **TBD** \_\_\_\_\_. This agreement can be renewed for successive one (1) year terms unless the terminating party shall give the nonterminating party written notice of its desire not to renew thirty (30) days prior to the anniversary date of this Maintenance Agreement. **Shorewood-Troy Public Library** may cancel this agreement at any time for cause with thirty (30) days written notice if a problem has not been resolved satisfactorily. Cosmopolitan may cancel this agreement with one hundred twenty (120) days written notice.

4. Client agrees to pay Cosmopolitan for the services to be rendered under this Maintenance Agreement the sum one thousand eight hundred and seventy-five dollars (\$1,875.00). Cosmopolitan invoices at the beginning of the month in which services are performed and payment is due by the 10th day of the next month.

5. The above consideration for performing the Maintenance Services is based upon the area and frequency of service described in the attached Client's Specifications. If there is any change in the area or services to be performed, Client and Cosmopolitan agree to negotiate a reasonable price adjustment.

6. Cosmopolitan shall not be liable for delay, loss or damage caused by warfare, riots, strikes, boycotts, acts of God, criminal acts, acts of omission of others, natural calamity, or other causes beyond Cosmopolitan's control. If Cosmopolitan is required to wash or wax floors when being used by employees, customers, tenants, or business visitors of Client, Client shall indemnify and hold harmless Cosmopolitan from any and all claims for injury and death resulting therefrom.

7. Cosmopolitan agrees to maintain in effect during the term of this Janitorial Service Agreement insurance for Worker's Compensation with statutory limits, personal injury and property damage with \$2,000,000.00 combined single limit liability per occurrence. A certificate of insurance evidencing such coverage shall be furnished to Client and **Shorewood-Troy Public Library** will also be named as additional insured.

8. Client agrees to furnish a locked secure janitor closet in which to store equipment and supplies necessary to perform the services specified by this agreement.

9. Client agrees to keep its facilities in a safe condition and in conformance with Federal, State and Local laws, ordinances and regulations, and agrees to indemnify and hold harmless Cosmopolitan from loss and liability (including reasonable attorney fees) caused by Client's failure to do so, unless in the event that the Cosmopolitan was responsible for the unsafe condition.



10. Client expressly agrees that during the term of this maintenance Agreement, and for one (1) year thereafter, Client shall not, either directly or indirectly, hire or retain any person or entity in the service of Cosmopolitan, either as an employee or independent contractor performed for the same, or substantially the same, services which said employee or independent contractor performed for Cosmopolitan, and Client expressly agrees that for the same time period, it shall not, for any reason, directly or indirectly, entice, induce or in any manner influence any person or entity in the service of Cosmopolitan, to leave such service for the purpose of engaging in the same, or substantially the same, duties for any other person, firm or entity. Should Client violate any of these terms, it is understood that Cosmopolitan will pursue any reasonable legal remedies available to it, with Client being responsible for all legal costs incurred, plus damages if awarded by the courts.

11. This Maintenance Agreement contains the entire agreement between the parties. All prior negotiations between the parties are merged in this agreement, and there are no understandings or agreement other than those incorporated herein. This agreement may not be modified except by written instrument signed by both parties. In the event of conflict between any of the foregoing provisions of this agreement and the attached Client's Specifications, the former shall be controlling. If any provisions of this Maintenance Agreement shall be held to be invalid and unenforceable, and any such invalidity and unenforceability shall not affect any other provision of this agreement. This Maintenance Agreement shall be interpreted and construed by in accordance with the laws and decisions of the State of Illinois.

IN WITNESS WHEREOF, THE PARTIES HERETO HAVE ENTERED into this Maintenance Agreement on the date set forth below.

CLIENT

COSMOPOLITAN

**Shorewood-Troy Public Library**

Cosmopolitan Building Services, Inc.  
11 Eton CT| South Barrington, IL |60010

BY \_\_\_\_\_

BY \_\_\_\_\_

Marek Pieprzyk, President

DATE \_\_\_\_\_

DATE \_\_\_\_\_

# **JANITORIAL CLEANING PROPOSAL**

prepared for:

## **SHOREWOOD TROY PUBLIC LIBRARY**

**650 Deerwood Dr., Shorewood, IL 60404**

submitted by:



**Agata Gawron**

*Sales Manager*

**Office: (847) 305-3777**

**Mobile: (312) 866-3222**

*2200 Landmeier Rd,*

*Elk Grove Village, IL 60007*

**August 18<sup>th</sup>, 2023**

MSCH Corporation  
2200 Landmeier Rd,  
Grove Village, IL 60007

*August 18<sup>th</sup>, 2023*



**SHOREWOOD TROY PUBLIC LIBRARY**  
**650 Deerwood Dr., Shorewood, IL 60404**

Thank you for giving MSCH the opportunity to present our professional janitorial cleaning proposal for your consideration. Here are a few of the important highlights:

**Initially...** All of our staff is trained to perform each cleaning task with accordance to our client's specification. Work done is expected to be completed in a timely matter, safety and security are our priorities as well. All of this is done to provide the most professional results possible.

**Following...** We provide a dedicated group of account executives that will lead the team at any of our locations, making sure that the work is completed with the accordance of contract.

**Expectations...** Our priority is to keep a very systematic approach to retain the warehouse looking exceptional. We have a high level of quality control that aims to keep the property looking its best for years to come.

Please do not hesitate to call or email if you have any questions or need additional information as you review our proposal.

*Sincerely,*

*Gregory Chrza*

*Owner*

*MSCH Corporation*

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## **SCHEDULE OF DUTIES**

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FOR

**SHOREWOOD TROY PUBLIC LIBRARY**  
**650 Deerwood Dr., Shorewood, IL 60404**

**Areas of responsibility:**

Public area

Office area

Restrooms

Kitchen area

**Frequency of service:**

Three times per week

**Timetable:**

TBD

**Access to the facility:**

Keys, Alarm

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## **SPECIFICATIONS**

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These specifications are intended as Basic Guideline for the cleaning program outlined in the following pages. MSCH has not attempted to include every minute details involved, but rather present a flexible plan of operation. Our primary objective is to achieve maximum performance within the general framework of these specifications and make the necessary adaptations to best meet the varying needs of the building.

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## **INVOICING**

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All invoicing will be itemized in accordance with the expected monthly work and tasks required. Any adjustments to the contract will be adjusted on the 1st of every month. 30 days Cancellation policy.

The payment policy is divided into net 30 days of service. In case of a delay in payment, of more than 45 days, late fees will be charged.

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## **STAFFING PLAN AND JOB DESCRIPTIONS**

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### **AREA SUPERVISOR (1)**

The primary responsibilities of this individual are overseeing the operations and functioning of all the staff assigned to the client facility. This person is off-site, checks in periodically to check building condition and appearance, equipment status, and related chemicals, addresses employee issues and concerns as that relate to the building, and provide training as needed. This person also interfaces with the client on regular, proactive basis to tour the building and keep lines of communications open.

### **NON-WORKING SUPERVISOR (1)**

This person is on-site. The primary responsibility of this individual is to oversee the day-to-day operation of the on-site staff. This person is dedicated solely to supervising, training, and assuring that all clients standards and requests have been complied with. This person report to the area supervisor, and also can interface with the client contact.

### **CLEANERS (1-2)**

It is the responsibility of these employees to execute the task as outlined in the specifications. Prior to starting an account and after the start up walkthrough is preformed, a plan as been made by the operations manager setting up the individual responsibilities of each cleaner assigned to the building. Depending upon the size of the building, as well as requirements, a lead, a working supervisor or non working supervisor may also be assigned.

### **PROJECT CREW (3) AS NEEDED**

The tasks preformed by these skilled employees include periodical work, and are in addition to any staff assigned to the building. Some examples of work are: stripping/waxing, carpet extraction, wall washing, pressure-washing.



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## EQUIPMENT LIST

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It's our goal to provide the best equipment and cleaning chemicals to ensure the highest standards and performance for our clients. We, therefore, interface with our vendor partners to stay on top of the industry's newest and most efficient equipment. Our equipment is matched to the needs and logistics of your facility.

Anticipated equipment: as needed

- Upright vacuum Sanitare/Eureka
- Backpack Vacuum Minuteman, vacpro
- Floor scrubber Clarke
- Carpet Extractor AAC
- Mobile Brutes Rubbermaid
- Mopes and Buckets Rubbermaid

\* All tissue, paper towel, seat protectors, soap, urinal cakes, can liners, etc., will be supplied by the Client.

**\*\* MSCH works closely with industrial chemical suppliers and can provide exclusive cleaning supply deals for our clients.**

**\*\* Cleaning supplies, cleaning agents and equipment for the nightly services to be supplied by MSCH.**

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## **SHOREWOOD TROY PUBLIC LIBRARY**

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### **CLEANING SPECIFICATIONS – 650 Deerwood Dr., Shorewood, IL 60404**

#### **PUBLIC AREA, OFFICE AREA**

##### **Per Service:**

- Empty trash from all waste baskets and replace liners. Empty recyclables from recycling containers. Damp wipe as needed. Remove waste to the dumpster and place recycling in appropriate containers. Empty and reline the outside containers.
- Dust all furniture tops in all areas, including the computer workstations. Spot clean any spills or markings, especially in public areas and meeting rooms.
- Vacuum carpeting and pick up debris in all areas. Spot clean any spills according to the manufacturer's directions for the carpet.
- Sweep and damp mop all uncarpeted areas, including public stairwells, according to the manufacturer's directions for the flooring.
- Clean and sanitize water fountains.
- Clean smudges from all surfaces in elevators, including doors, walls, and ceilings.
- Spot clean handprints on all interior doors, around door frames, around light switches, and all other areas.
- Spot clean all glass entry doors and handprints on interior glass.
- Damp wipe public stairway handrails.
- Keep janitor closets neat and orderly.
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## **SHOREWOOD TROY PUBLIC LIBRARY**

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**CLEANING SPECIFICATIONS – 650 Deerwood Dr., Shorewood, IL 60404**

### **RESTROOMS**

**Per service:**

- Clean, sanitize and polish all vitreous fixtures including hand basins, toilet bowls, and urinals.
- Clean and sanitize toilet seats (both sides).
- Empty waste containers, and clean and replace liners.
- Wash and sanitize the exterior of all containers.
- Remove spots, stains, and splashes from wall areas adjacent to hand basins and towel holders.
- Refill soap and sanitary products.
- Clean and polish all chrome fittings.
- Dry dust with a treated mop on all hard surface flooring.
- Wet mop open areas of all hard surface flooring.

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## **SHOREWOOD TROY PUBLIC LIBRARY**

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**CLEANING SPECIFICATIONS – 650 Deerwood Dr., Shorewood, IL 60404**

### **KITCHEN AREA**

**Per Service:**

- Clean countertops and fronts of kitchen cabinets.
- Clean the outside and inside of the microwave.
- Clean the outside of the fridge.
- Wash and sanitize tabletops.
- Clean and sanitize sinks.
- Clean and sanitize all handles.
- Clean the exterior of kitchen appliances.
- Dry dust with a treated mop on all hard surface flooring.
- Wet mop open areas of all hard surface flooring.

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## **SHOREWOOD TROY PUBLIC LIBRARY**

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### **CLEANING SPECIFICATIONS – 650 Deerwood Dr., Shorewood, IL 60404**

#### **WEEKLY**

- Dust office equipment, sills, ledges, baseboard trim, windows ledges, molding, pictures, and wall hangings as high as can be reached from floor level.
- Damp wipe all public tables.
- Survey areas and clean by water extraction all carpet spills and spots.

#### **MONTHLY**

- Thoroughly detail clean drinking fountains and restrooms, including washing stalls and scouring hard water stains from sinks, toilets, and urinals.
- Vacuum under staff and public desks and workstations.
- Perimeter vacuum edges, corners, under baseboards, etc.
- Thorough dusting of all book and AV shelves throughout the building.

#### **QUARTERLY**

- High dust in all public and staff areas not reached in nightly cleaning, including tops of book stacks, tall cabinets, and door closers.
- Vacuum all upholstered furniture.
- Vacuum ceiling ventilation grills and hanging signs.
- Vacuum light fixtures.
- Detail clean all restrooms, including completely wiping the walls, cleaning and seal all grout, and thoroughly cleaning all fixtures.

### **YEARLY**

- Clean all carpets according to manufacturer specifications. \*\*\*

\*\*\* Not included in monthly generated price.



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## SHOREWOOD TROY PUBLIC LIBRARY

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**CLEANING SPECIFICATIONS – 650 Deerwood Dr., Shorewood, IL 60404**

### MISCELLANEOUS

- Leave notices advising of any irregularities noted during service (defective plumbing, fixtures, burned lights, doors left unlocked, shortage of restroom supplies, etc.).
- Property arrange office furniture.
- Leave only designated lights on after cleaning is completed.
- All exterior doors will be locked, and the premises left in a secure condition each night.
- Report to building management any incidents of unauthorized use of electrical or telephone closets for storage

**MSCH has access to a wide range of janitorial cleaning services such as, but not limited to strip and wax, power washing, floor scrubbing, concrete repair and polish, and many more.**

**All products are approved by the CDC and EPA**

**Due to the COVID-19 pandemic, it is vital that your business thoroughly and regularly cleans areas that see a lot of contacts.**

MSCH has partnered up with an industrial chemical and paper product supplier **MADOOV INC.**, who can provide **exclusive pricing for our Clients.**

**Scan the QR code to place an online order**  
**and get FREE EXPRESS SHIPPING**



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## PRICE GENERATOR SUMMARY

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Janitorial cleaning for **SHOREWOOD TROY PUBLIC LIBRARY**

Project address: **650 Deerwood Dr., Shorewood, IL 60404**

**Monthly generated price:** \$ 1,950.00

**Annually carpet cleaning:** \$ 2,700.00

**Included:** supervisor visits

**Additional Services:** carpet cleaning, strip and wax

Additional services are PER REQUEST and additional charge

\* All tissue, paper towel, seat protectors, soap, urinal cakes, and can liners, will be supplied by the Client.

\*\* MSCH works closely with industrial chemical suppliers and can provide exclusive cleaning supply deals for our clients.

\*\* Cleaning supplies, cleaning agents, and equipment for the nightly services to be supplied by MSCH.

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## AGREEMENT

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This Agreement ("this Agreement") is made and entered into as of \_\_\_\_\_, 2023,  
by and between MSCH with its principal place of business located at 2200 Landmeier Rd, Elk  
Grove Vlg, IL 60007 and \_\_\_\_\_ (Customer)  
with its principal place of business located at \_\_\_\_\_.

NOW, Therefore, in consideration of the mutual promises and benefits to be derived by the  
parties they mutually agree to the terms and conditions as outlined above in this agreement.

IN WITNESS WHEREOF, the parties have executed this Agreement effective as of the date and  
the year first written above.

### MSCH CORPORATION

### CUSTOMER

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PRINT NAME

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PRINT NAME

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SIGNATURE

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SIGNATURE

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DATE

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DATE

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TITLE

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TITLE