



Canton Public Library Board of Trustees General Meeting Packet Contents

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Library Board of Trustees Meeting Agenda

CANTON PUBLIC LIBRARY BOARD OF TRUSTEES – GENERAL MEETING March 18, 2021 7:30 p.m.

7:30 p.m.	<ul style="list-style-type: none"> • Call the Meeting to Order 	
	<ul style="list-style-type: none"> • Call to Audience (5 min. maximum) 	
Unanimous Consent	<ul style="list-style-type: none"> • Approval of Agenda 	
Unanimous Consent	<ul style="list-style-type: none"> • Approval of General Meeting Minutes 	
Administrative Reports	<ul style="list-style-type: none"> • Communications • Report of the Library Director • Trustee Comments 	
Committee Reports	<ul style="list-style-type: none"> • None 	
Unfinished Business & General Orders Discussion Item Discussion Item	<ul style="list-style-type: none"> • Update on Phased Reopening • Fines Elimination – Factors to Consider 	
New Business Presentation Action Item 21/3-18-1 Discussion Item	<ul style="list-style-type: none"> • PULSE project presentation — Senior residents (L. Golden, L. Fawcett, T. Scott, K. Minshall) • Approval of Bibliocommons recommendation for Content Management System expenditure in 2021: Website, catalog, and events • 2022 Budget Discussion — expenditures <ul style="list-style-type: none"> ○ Healthcare plan coverage discussion — discuss expanding coverage to fully comply with PPACA 	
	<ul style="list-style-type: none"> • Call to Audience (5 min. maximum) • Adjourn 	



Canton Public Library Board of Trustees General Meeting Minutes

February 18, 2021 – 7:30 PM

The Chairperson, Nancy Eggenberger, called the meeting to order at 7:33 PM.

Present: (participating remotely from Canton, MI) N. Eggenberger, M. Farell, A. Iqbal, J. Lee,
C. Spas, A. Watts

Absent: None

Also Present: E. Davis, K. Gladden

CALL TO AUDIENCE (K. Bounds, L. Golden, M. Hathaway, D. McHugh, M. Nicholson, J. Noricks, D. Stine,
C. Swanberg, J. Visnaw) – None

APPROVAL OF AGENDA

The agenda was accepted by unanimous consent.

APPROVAL OF GENERAL MEETING MINUTES

The minutes were accepted by unanimous consent.

COMMUNICATIONS — None

DIRECTOR'S REPORT

As of January 31, the library is 8% of the way through the new fiscal year. On the revenue side, the majority of property tax income has been received. On the expenditure side, two areas are trending higher than 8% but will fall in line over the course of the year: Fringes, due to the bulk annual payment made to MERS to fund the pension plan; and Professional & Contractual, due mainly to annual IT-related licenses and contracts that are due for payment early in the year.

The Plante Moran audit is being completed this week via Zoom and email. They will present their audit report to the board at the April 15 meeting.

Dave Ewick, currently the director at the Southfield Public Library, has accepted the position of Department Head for Information Services. He will assume his new duties on April 12, after officially retiring from Southfield.

Digital periodical services previously supplied by RB Digital have now been folded into the Libby platform, as Overdrive has purchased RB Digital.

To improve security for library card accounts and MyAccount access, security PINs will be instituted for all library cardholders in April.

March is Reading Month, and Information Services Manager Jack Visnaw and the Youth librarian staff are working with Community Relations Department Head Laurie Golden and her staff to offer virtual programming to 1st Grade students and teachers in Canton's public, private and charter schools.

Director Eva Davis reminded the board members to reach out to L. Golden to arrange for a safely produced photo session. The photos submitted to her for the website have been of varying quality.

TRUSTEE COMMENTS — None

COMMITTEE REPORTS — None

UNFINISHED BUSINESS & GENERAL ORDERS

Update on Phased Reopening — Circulation Services Department Head Kat Bounds and her staff made the decision to eliminate the lobby holds pick up option. Beginning February 23, patrons may pick up their holds in the library or they can make an appointment for curbside pick up.

Some neighboring libraries are still offering only curbside service, while others are moving toward "grab and go" browsing options. Vice Chair Michelle Farell asked if people will want more access to the library after the schools open fully on March 1. E. Davis said that the department heads have been discussing options, but don't want to be too far in front of other area libraries. Before "lingering" would be allowed, it is likely that other services would be expanded:

1. Return to full library hours (9AM –9PM Monday-Thursday, 9AM-6PM Friday-Saturday, 12:00-6:00 PM Sunday)
2. Possible increase in time limits for browsing and computer use
3. Increased occupancy limit (currently capped at 50 patrons)

NEW BUSINESS

Staffing Proposal — M. Farell indicated enthusiasm for a fulltime security monitor position, saying that offering more hours and benefits would contribute to less turnover in the position. In answer to questions raised by Trustee Jasmine Lee regarding potential budget increases and increased salary costs, Davis stated that any increases in the 2021 budget for the fulltime youth librarian position would derive only from increased fringe benefit costs, as the salary costs would be covered by funds which have been budgeted for positions that are now vacant. She hoped that salary costs for the projected conversions to fulltime status (for a security monitor and adult librarian) in 2022/2023 could also be covered through attrition.

The board was in favor of considering such conversions in upcoming budget discussions.

M. Farell moved and J. Lee supported a motion to approve an additional fulltime Youth Librarian position in 2021.

ROLL CALL VOTE

Yes: N. Eggenberger, M. Farell, A. Iqbal, J. Lee, C. Spas, A. Watts

No: None

Abstain: None

The motion passed unanimously 21/2-18-1

Phase 2 Facilities Proposal — Business Services Department Head Marian Nicholson introduced Dan Stine of Sustainable Energy Engineering (SEE), whose proposal to engineer and manage the roof and RTU replacements was submitted to the board for consideration. Trustee J. Lee questioned the timing and length of the project (approximately one month for pre-construction and possibly 6-12 weeks for construction, to be completed by, hopefully, the end of the summer) and potential impact on patrons (the building would likely have to be shut down for at least one day when the rooftop cranes hoist the RTUs onto the rooftop.)

Chair Nancy Eggenberger clarified that the motion before the board was to approve the pre-construction, Design-Build contract only; once SEE submits a construction proposal with firm bids, the board will have to vote again to approve the final contract. M. Nicholson reminded the board that the roof replacement was already in the capital improvements budget for 2022; it would just be pulled into the 2021 budget to achieve the efficiency of having it done in sync with the RTU installation.

A. Watts moved and C. Spas supported a motion to approve a pre-construction Design-Build services contract with Sustainable Energy Engineering for RTU replacement and roofing repair/replacement.

ROLL CALL VOTE

Yes: N. Eggenberger, M. Farell, A. Iqbal, J. Lee, C. Spas, A. Watts

No: None

Abstain: None

The motion passed unanimously 21/2-18/2

2022 Budget Discussion — Expenditures

MERS Pension — Davis explained to the new board members that the library had closed the Municipal Employees Retirement System (MERS) fund to new hires in 2017. Previous boards had approved the Administration's goal to overfund the existing pension fund with the objective of reaching a self-sustaining level. With that target in mind, she recommended contributing \$125,000 in 2022 (the same contribution as in 2021).

The board agreed to a \$125,000 placeholder for the 2022 budget.

Library Materials — Davis recommended that the library again budget 15% of total revenues for library materials, with an increasing amount allotted for digital materials, at the suggestion of Collection Specialist Lisa Craig. A cost analysis for vendors to pre-process audio-visual materials will be done.

Craig has attended diversity audit training and is sharing her knowledge with the rest of the collection selectors, which should result in materials being even more representative of the community as a whole. Davis also said that expansion of e-materials means an increase in the library's International Language offerings.

The board agreed to 15% for materials expenditure for 2022.

Endowment Fund Review — Davis briefly reviewed the Endowment Fund Activity bar graph document, which reflected the growth trend since the library placed the fund with the Canton Community Foundation. Trustee Lee, who is the library's representative on the CCF Finance Committee, expressed her pride in serving on the committee and in the library's support of the foundation itself.

Fines Elimination — The board touched on a few factors to consider in discussing the possibility of eliminating overdue fines (motivations for returning items if fines are eliminated, community response to the possibility). They decided to revisit the issue and discuss K. Bounds' report in greater depth at the March meeting.

CALL TO AUDIENCE – Youth Librarian Manager Jack Visnaw III thanked the board for authorizing the creation of the new fulltime Youth Librarian position.

ADJOURN

The meeting was adjourned at 9:02 PM.

A handwritten signature in cursive script that reads "Amy M Watts".

Amy Watts, Secretary-Treasurer

1:11 PM
03/02/21
Accrual Basis

Canton Public Library
Balance Sheet
As of February 28, 2021

	<u>Jan 31, 21</u>	<u>Feb 28, 21</u>
ASSETS		
Current Assets		
Checking/Savings		
000-004 · Chase - Checking	6,817,546.85	7,749,714.35
000-013 · JPMorgan Chase- Credit Card	7,083.29	6,010.85
000-014 · Medical Reimbsmt (BasicFlex)	10,532.29	11,573.73
000-016 · Chase - High Yield Savings	997,679.86	997,702.77
Total Checking/Savings	<u>7,832,842.29</u>	<u>8,765,001.70</u>
Total Current Assets	<u>7,832,842.29</u>	<u>8,765,001.70</u>
TOTAL ASSETS	<u>7,832,842.29</u>	<u>8,765,001.70</u>
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Accounts Payable		
000-202 · Accounts Payable	<u>21,442.52</u>	<u>11,752.22</u>
Total Accounts Payable	<u>21,442.52</u>	<u>11,752.22</u>
Credit Cards		
000-208 · Chase - Visa 3651	<u>1,314.36</u>	<u>5,193.08</u>
Total Credit Cards	<u>1,314.36</u>	<u>5,193.08</u>
Other Current Liabilities		
000-229 · Grants/Donations-Restricted Use		
229d · Friends Donation-Social Cmmte	4,016.41	3,901.55
229e · Misc. Grants & Donations	<u>1,208.71</u>	<u>1,208.71</u>
Total 000-229 · Grants/Donations-Restricted Use	<u>5,225.12</u>	<u>5,110.26</u>
000-237 · Medical Saving Deduction MedFSA	<u>2,204.89</u>	<u>3,246.33</u>
Total Other Current Liabilities	<u>7,430.01</u>	<u>8,356.59</u>
Total Current Liabilities	<u>30,186.89</u>	<u>25,301.89</u>
Total Liabilities	<u>30,186.89</u>	<u>25,301.89</u>
Equity		
000-390 · General Fund Balance	4,337,699.10	4,337,699.10
Net Income	<u>3,464,956.30</u>	<u>4,402,000.71</u>
Total Equity	<u>7,802,655.40</u>	<u>8,739,699.81</u>
TOTAL LIABILITIES & EQUITY	<u>7,832,842.29</u>	<u>8,765,001.70</u>

Canton Public Library
Profit & Loss Budget vs. Actual
as of February 28, 2021

	Jan - Feb 21	Budget	\$ Over Budget	% of Budget
Income				
738-403 · Property Taxes	5,350,436.25	6,137,000.00	(786,563.75)	87.18%
738-566 · State Aid to Libraries	-	48,750.00	(48,750.00)	0.00%
738-613 · Photocopy Fees	2,554.75	45,000.00	(42,445.25)	5.68%
738-615 · Replacement - Books/ AV	1,242.82	9,500.00	(8,257.18)	13.08%
738-656 · Penal Fines	-	45,750.00	(45,750.00)	0.00%
738-664 · Overdue Fines	3,092.65	30,000.00	(26,907.35)	10.31%
738-670 · Misc & Contributions	687.00	1,000.00	(313.00)	68.70%
738-671 · Interest Income	48.27	5,000.00	(4,951.73)	0.97%
738-676 · Vending Commission	-	6,000.00	(6,000.00)	0.00%
738-677 · Meeting Room Rental	-	500.00	(500.00)	0.00%
Total Income	5,358,061.74	6,328,500.00	(970,438.26)	84.67%
Gross Profit	5,358,061.74	6,328,500.00	(970,438.26)	84.67%
Expense				
738-693 · Endowment Transfers	-	500.00	(500.00)	0.00%
738-702 · Salaries & Wages	320,785.48	2,975,000.00	(2,654,214.52)	10.78%
738-715 · Fringe Benefits	206,788.71	626,500.00	(419,711.29)	33.01%
738-722 · Supplies	6,583.65	164,950.00	(158,366.35)	3.99%
738-740 · Library Materials	209,046.74	950,000.00	(740,953.26)	22.01%
738-801 · Professional & Contractual	113,133.01	408,930.00	(295,796.99)	27.67%
738-850 · Communications	2,246.87	32,700.00	(30,453.13)	6.87%
738-860 · Travel	707.84	41,650.00	(40,942.16)	1.70%
738-880 · Community Promotion	578.50	26,200.00	(25,621.50)	2.21%
738-900 · Printing	271.00	52,900.00	(52,629.00)	0.51%
738-910 · Insurance	49,544.00	60,500.00	(10,956.00)	81.89%
738-920 · Utilities	11,653.57	203,000.00	(191,346.43)	5.74%
738-930 · Maintenance & Repairs	19,581.11	248,350.00	(228,768.89)	7.88%
738-940 · Rentals/Leases	1,659.90	17,400.00	(15,740.10)	9.54%
738-976 · Building Improvements	-	15,000.00	(15,000.00)	0.00%
738-977 · Capital Outlay	12,805.00	1,087,600.00	(1,074,795.00)	1.18%
738-996 · Property Tax Refunds	675.65	1,500.00	(824.35)	45.04%
Total Expense	956,061.03	6,912,680.00	(5,956,618.97)	13.83%
Net Change in Fund Balance	4,402,000.71	(584,180.00)	4,986,180.71	-753.54%
Fund Balance - Beginning of year	3,425,895.40	3,425,895.00		
Fund Balance - End of year	7,827,896.11	2,841,715.00		

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as of February 28, 2021

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Income				
738-403 · Property Taxes	5,350,436.25	6,137,000.00	(786,563.75)	87.18%
738-566 · State Aid to Libraries	-	48,750.00	(48,750.00)	0.00%
738-613 · Photocopy Fees	2,554.75	45,000.00	(42,445.25)	5.68%
738-615 · Replacement - Books/ AV	1,242.82	9,500.00	(8,257.18)	13.08%
738-656 · Penal Fines	-	45,750.00	(45,750.00)	0.00%
738-664 · Overdue Fines	3,092.65	30,000.00	(26,907.35)	10.31%
738-670 · Misc & Contributions	687.00	1,000.00	(313.00)	68.70%
738-671 · Interest Income				
671g · Interest Income General	48.27	5,000.00	(4,951.73)	0.97%
Total 738-671 · Interest Income	48.27	5,000.00	(4,951.73)	0.97%
738-676 · Vending Commission	-	6,000.00	(6,000.00)	0.00%
738-677 · Meeting Room Rental	-	500.00	(500.00)	0.00%
Total Income	5,358,061.74	6,328,500.00	(970,438.26)	84.67%
Gross Profit	5,358,061.74	6,328,500.00	(970,438.26)	84.67%
Expense				
738-693 · Endowment Transfers	-	500.00	(500.00)	0.00%
738-702 · Salaries & Wages	320,785.48	2,975,000.00	(2,654,214.52)	10.78%
738-715 · Fringe Benefits				
715a · Health Savings Account FSA	1,255.67	2,000.00	(744.33)	62.78%
715b · Unemployment Reimbursement	-	1,000.00	(1,000.00)	0.00%
738-716 · Medical/Dental				
716b · Medical Buy Outs	-	3,600.00	(3,600.00)	0.00%
716d · Dental	-	21,400.00	(21,400.00)	0.00%
716m · Medical (BCN)	45,309.34	195,000.00	(149,690.66)	23.24%
Total 738-716 · Medical/Dental	45,309.34	220,000.00	(174,690.66)	20.60%
738-717 · Life Ins / Disability	2,138.17	15,500.00	(13,361.83)	13.80%
738-718 · Retirement Pension (MERS)	125,000.00	125,000.00	-	100.00%
738-719 · Optical	400.00	7,000.00	(6,600.00)	5.71%
738-720 · FICA / MC Taxes	29,651.22	228,000.00	(198,348.78)	13.01%
738-721 · Retirement DC Plan (401a)	3,034.31	28,000.00	(24,965.69)	10.84%
Total 738-715 · Fringe Benefits	206,788.71	626,500.00	(419,711.29)	33.01%
738-722 · Supplies				
722t · Technology Supplies	717.16	23,200.00	(22,482.84)	3.09%
738-727 · Office Supplies				
727a · General Office Supplies	342.71	8,500.00	(8,157.29)	4.03%
727b · Printing & Copying Supplies	10.98	4,000.00	(3,989.02)	0.28%
Total 738-727 · Office Supplies	353.69	12,500.00	(12,146.31)	2.83%
738-728 · Library Supplies- General				
738-724 · Information Services Supplies	36.47	6,000.00	(5,963.53)	0.61%
738-725 · Proc Library Supplies				
725a · Circulation Services Supplies	352.58	17,515.00	(17,162.42)	2.01%
725b · Tech Processing Supplies	1,417.84	20,000.00	(18,582.16)	7.09%
Total 738-725 · Proc Library Supplies	1,770.42	37,515.00	(35,744.58)	4.72%
738-726 · Community Relations Supplies	263.63	1,000.00	(736.37)	26.36%
738-729 · Building Supplies	881.34	21,000.00	(20,118.66)	4.20%
738-728 · Library Supplies- General - Other	1,225.16	12,000.00	(10,774.84)	10.21%
Total 738-728 · Library Supplies- General	4,177.02	77,515.00	(73,337.98)	5.39%
738-730 · Postage				
730b · Postage - Info Services	315.26	5,000.00	(4,684.74)	6.31%
730c · Postage - Circulation Services	-	150.00	(150.00)	0.00%

Canton Public Library
Profit & Loss Budget vs. Actual
as of February 28, 2021

	Jan - Feb 21	Budget	\$ Over Budget	% of Budget
730j · Postage - Business Services	(329.08)	2,825.00	(3,154.08)	-11.65%
730m · Postage - Community Relations	235.00	29,260.00	(29,025.00)	0.80%
Total 738-730 · Postage	221.18	37,235.00	(37,013.82)	0.59%
738-732 · Janitorial Supplies	1,114.60	14,500.00	(13,385.40)	7.69%
Total 738-722 · Supplies	6,583.65	164,950.00	(158,366.35)	3.99%
738-740 · Library Materials				
738-741 · Books	18,734.14	236,170.00	(217,435.86)	7.93%
738-744 · AV (Media)	6,344.49	111,000.00	(104,655.51)	5.72%
738-747 · Services, Subscrip & Pre-proc	183,968.11	602,830.00	(418,861.89)	30.52%
Total 738-740 · Library Materials	209,046.74	950,000.00	(740,953.26)	22.01%
738-801 · Professional & Contractual				
738-731 · Credit Card Fees	149.12	5,000.00	(4,850.88)	2.98%
738-733 · Bank Fees				
733g · Bank Fees General	-	1,000.00	(1,000.00)	0.00%
Total 738-733 · Bank Fees	-	1,000.00	(1,000.00)	0.00%
738-804 · Audit	9,200.00	12,675.00	(3,475.00)	72.58%
738-808 · Information Technology				
808t · Online Information-Technology	89,126.49	198,000.00	(108,873.51)	45.01%
808tp · Online Info - Tech Processing	1,025.00	28,300.00	(27,275.00)	3.62%
Total 738-808 · Information Technology	90,151.49	226,300.00	(136,148.51)	39.84%
738-809 · Programming-Community Relations				
809d · Community Programming	1,707.45	32,000.00	(30,292.55)	5.34%
Total 738-809 · Programming-Community Relations	1,707.45	32,000.00	(30,292.55)	5.34%
738-810 · Other Professional Services				
810a · Payroll	2,527.77	15,000.00	(12,472.23)	16.85%
810b · Professional Services-Circ Srv	56.70	9,250.00	(9,193.30)	0.61%
810j · Professional Services - Bus Srv	129.98	12,050.00	(11,920.02)	1.08%
810m · Professional Services - Com Rel	4,040.00	42,900.00	(38,860.00)	9.42%
Total 738-810 · Other Professional Services	6,754.45	79,200.00	(72,445.55)	8.53%
738-812 · Legal	1,302.00	15,000.00	(13,698.00)	8.68%
738-814 · Membership Dues				
814a · Membership Dues - Director	295.00	1,500.00	(1,205.00)	19.67%
814b · Membership Dues - Info Services	-	2,400.00	(2,400.00)	0.00%
814c · Membership Dues - Circ Services	251.00	1,000.00	(749.00)	25.10%
814e · Membership Dues - Info Tech	189.00	1,400.00	(1,211.00)	13.50%
814j · Membership Dues - Business Srv	400.00	1,500.00	(1,100.00)	26.67%
814k · Membership Dues - Miscellaneous	627.00	9,900.00	(9,273.00)	6.33%
814m · Membership Dues - Community Rel	-	930.00	(930.00)	0.00%
Total 738-814 · Membership Dues	1,762.00	18,630.00	(16,868.00)	9.46%
738-815 · Staff Inservice				
815a · Staff Inservice/Training	-	5,000.00	(5,000.00)	0.00%
815b · Staff Longevity Awards	500.00	2,825.00	(2,325.00)	17.70%
815c · Staff Development/Training	-	5,500.00	(5,500.00)	0.00%
815t · Online Training Services - IT	1,606.50	5,800.00	(4,193.50)	27.70%
Total 738-815 · Staff Inservice	2,106.50	19,125.00	(17,018.50)	11.01%
Total 738-801 · Professional & Contractual	113,133.01	408,930.00	(295,796.99)	27.67%
738-850 · Communications	2,246.87	32,700.00	(30,453.13)	6.87%
738-860 · Travel				
738-861 · Conferences (Incl.Registration)				
861a · Conferences - Director	-	3,000.00	(3,000.00)	0.00%
861b · Conferences - Info. Services	350.00	6,200.00	(5,850.00)	5.65%

Canton Public Library
Profit & Loss Budget vs. Actual
as of February 28, 2021

	Jan - Feb 21	Budget	\$ Over Budget	% of Budget
861d · Conferences - Circ Serv.	100.00	4,500.00	(4,400.00)	2.22%
861f · Conferences - Trustees	-	1,000.00	(1,000.00)	0.00%
861g · Leadership Canton	-	1,600.00	(1,600.00)	0.00%
861h · Conferences - Info. Technology	250.00	8,400.00	(8,150.00)	2.98%
861j · Conferences - Business Services	-	4,000.00	(4,000.00)	0.00%
861m · Conferences-Community Relations	-	3,000.00	(3,000.00)	0.00%
Total 738-861 · Conferences (Incl.Registration)	700.00	31,700.00	(31,000.00)	2.21%
738-865 · Mileage / Misc.				
865a · Mileage - Director	-	2,500.00	(2,500.00)	0.00%
865b · Mileage - Information Services	-	2,250.00	(2,250.00)	0.00%
865c · Mileage - Circ. Services	7.84	1,000.00	(992.16)	0.78%
865e · Mileage- Information Technology	-	1,300.00	(1,300.00)	0.00%
865f · Mileage - Business Services	-	2,000.00	(2,000.00)	0.00%
865m · Mileage - Community Relations	-	900.00	(900.00)	0.00%
Total 738-865 · Mileage / Misc.	7.84	9,950.00	(9,942.16)	0.08%
Total 738-860 · Travel	707.84	41,650.00	(40,942.16)	1.70%
738-880 · Community Promotion				
880a · Marketing	578.50	23,800.00	(23,221.50)	2.43%
880b · Volunteer	-	2,400.00	(2,400.00)	0.00%
Total 738-880 · Community Promotion	578.50	26,200.00	(25,621.50)	2.21%
738-900 · Printing				
738-901 · Printing & Publishing				
901c · Com Rel Printing & Publishing	-	51,200.00	(51,200.00)	0.00%
901e · Misc. Printing & Publishing	271.00	1,200.00	(929.00)	22.58%
Total 738-901 · Printing & Publishing	271.00	52,400.00	(52,129.00)	0.52%
738-903 · Legal Notices & Ads	-	500.00	(500.00)	0.00%
Total 738-900 · Printing	271.00	52,900.00	(52,629.00)	0.51%
738-910 · Insurance				
738-911 · Liability Ins	41,670.00	41,000.00	670.00	101.63%
738-912 · Worker's Comp	4,128.00	7,000.00	(2,872.00)	58.97%
738-915 · E&O/D&O/EPL	3,746.00	3,500.00	246.00	107.03%
738-916 · Fiduciary/Fidelity	-	9,000.00	(9,000.00)	0.00%
Total 738-910 · Insurance	49,544.00	60,500.00	(10,956.00)	81.89%
738-920 · Utilities				
738-921 · Electricity	10,194.89	150,000.00	(139,805.11)	6.80%
738-922 · Gas	1,136.83	33,000.00	(31,863.17)	3.45%
738-923 · Water	321.85	20,000.00	(19,678.15)	1.61%
Total 738-920 · Utilities	11,653.57	203,000.00	(191,346.43)	5.74%
738-930 · Maintenance & Repairs				
738-931 · Cleaning/Janitorial Services	9,600.00	92,000.00	(82,400.00)	10.44%
738-932 · Lawn & Grounds Maintenance				
932a · Snow Removal	6,091.66	36,000.00	(29,908.34)	16.92%
932b · Lawn & Grounds Maintenance	400.00	44,350.00	(43,950.00)	0.90%
Total 738-932 · Lawn & Grounds Maintenance	6,491.66	80,350.00	(73,858.34)	8.08%
738-933 · Building Security	1,233.00	6,700.00	(5,467.00)	18.40%
738-934 · Library Equip & Misc Contracts				
934b · Aquarium	283.45	3,000.00	(2,716.55)	9.45%
934c · Misc. Contracts & Inspections	1,042.00	8,900.00	(7,858.00)	11.71%
934g · HVAC Maintenance Contracts	721.00	16,500.00	(15,779.00)	4.37%
Total 738-934 · Library Equip & Misc Contracts	2,046.45	28,400.00	(26,353.55)	7.21%
738-935 · Office Equip Maint Contracts	210.00	900.00	(690.00)	23.33%

Canton Public Library
Profit & Loss Budget vs. Actual
as of February 28, 2021

	Jan - Feb 21	Budget	\$ Over Budget	% of Budget
738-936 · Building Repairs	-	20,000.00	(20,000.00)	0.00%
738-937 · Equipment Repairs	-	20,000.00	(20,000.00)	0.00%
Total 738-930 · Maintenance & Repairs	19,581.11	248,350.00	(228,768.89)	7.88%
738-940 · Rentals/Leases				
942 · Postage Meter - Pitney Bowes				
942b · Copy Machine Lease	1,219.95	15,400.00	(14,180.05)	7.92%
942 · Postage Meter - Pitney Bowes - Other	439.95	2,000.00	(1,560.05)	22.00%
Total 942 · Postage Meter - Pitney Bowes	1,659.90	17,400.00	(15,740.10)	9.54%
Total 738-940 · Rentals/Leases	1,659.90	17,400.00	(15,740.10)	9.54%
738-976 · Building Improvements	-	15,000.00	(15,000.00)	0.00%
738-977 · Capital Outlay				
977t · Capital Outlay - Technology	12,805.00	1,087,600.00	(1,074,795.00)	1.18%
Total 738-977 · Capital Outlay	12,805.00	1,087,600.00	(1,074,795.00)	1.18%
738-996 · Property Tax Refunds	675.65	1,500.00	(824.35)	45.04%
Total Expense	956,061.03	6,912,680.00	(5,956,618.97)	13.83%
Net Change in Fund Balance	4,402,000.71	(584,180.00)	4,986,180.71	-753.54%
Fund Balance - Beginning of year	3,425,895.40	3,425,895.00		
Fund Balance - End of year	7,827,896.11	2,841,715.00		

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Accrual Basis

Canton Public Library
Transactions by Account
As of February 28, 2021

Type	Date	Num	Name	Memo	Amount	Balance
000-004 - Chase - Checking						6,817,546.85
General Journal	02/03/2021	1779	Paylocity Direct Deposits	Direct Deposits	-72,102.97	6,745,443.88
General Journal	02/03/2021	1779	Paylocity Taxes	Total Tax Liability Taken from PR Bank Ac	-25,822.14	6,719,621.74
Check	02/03/2021	EFT	Paylocity	Payroll Processing Fees - Payroll Date 02/	-424.85	6,719,196.89
Check	02/03/2021	EFT	Nationwide Retirement Solutions	401A Employer Contributions for Payroll	-829.52	6,718,367.37
Check	02/03/2021	EFT	Nationwide Retirement Solutions	457b Employee Contributions for Payroll	-4,395.24	6,713,972.13
Check	02/03/2021	EFT	Nationwide Retirement Solutions	457br Employee Contributions for Payrol	-125.00	6,713,847.13
Transfer	02/03/2021			Funds Transfer - Payroll Date 02/03/2021	-1,059.22	6,712,787.91
Transfer	02/03/2021			Funds Transfer in excess of \$5,000	2,500.00	6,715,287.91
Deposit	02/08/2021			Deposit	2,433.01	6,717,720.92
Check	02/11/2021	51703	Chase Visa	Visa statement 2/02/2021	-1,294.41	6,716,426.51
Bill Pmt -Check	02/11/2021	51704	Miscellaneous Patron - Refunds	Meggan B Ellis: Materials overpayment re	-22.20	6,716,404.31
Bill Pmt -Check	02/11/2021	51705	Miscellaneous Vendor-ILL/MEL	Brandon Township Public Library: Jurassic	-4.99	6,716,399.32
Bill Pmt -Check	02/11/2021	51706	Miscellaneous Vendor	NorthStar Medical Equipment - Adult & Ir	-170.00	6,716,229.32
Bill Pmt -Check	02/11/2021	51707	Miscellaneous Vendor-ILL/MEL	Southfield Public Library: Keepers of the	-41.00	6,716,188.32
Bill Pmt -Check	02/11/2021	51708	Miscellaneous Vendor-Programming	Imagine Video Productions Evanston's Liv	-250.00	6,715,938.32
Bill Pmt -Check	02/11/2021	51709	AmazonBusiness	A265GG3U5ZD0HS	-1,075.29	6,714,863.03
Bill Pmt -Check	02/11/2021	51710	Anything Retail	4ft Recycling boxes (2)	-110.00	6,714,753.03
Bill Pmt -Check	02/11/2021	51711	Baker & Taylor (510)	L417510	-4,541.41	6,710,211.62
Bill Pmt -Check	02/11/2021	51712	Baker & Taylor (520)	L417520	-597.67	6,709,613.95
Bill Pmt -Check	02/11/2021	51713	Baker & Taylor (530)	L417530	-1,264.45	6,708,349.50
Bill Pmt -Check	02/11/2021	51714	Baker & Taylor (854)	L517854	-298.06	6,708,051.44
Bill Pmt -Check	02/11/2021	51715	Bounds, Katerli	ALA/PLA/NMRT membership...MLA mem	-251.00	6,707,800.44
Bill Pmt -Check	02/11/2021	51716	Canton Township - Water Dept.	Water & sewer 10/27/2020 - 01/05/2021	-321.85	6,707,478.59
Bill Pmt -Check	02/11/2021	51717	Citizens Insurance Company	Commercial Inland Marine Policy...Comm	-45,798.00	6,661,680.59
Bill Pmt -Check	02/11/2021	51718	Clear Rate Communications	4893421	-694.47	6,660,986.12
Bill Pmt -Check	02/11/2021	51719	Comic City	Comics 24 teen 5 juvenile	-118.71	6,660,867.41
Bill Pmt -Check	02/11/2021	51720	Computype, Inc.	Service maintenance contract: Standard I	-189.00	6,660,678.41
Bill Pmt -Check	02/11/2021	51721	D.K. Agencies (P) LTD.	16 yuva racayitala tollprema kathalu...Jay	-900.00	6,659,778.41
Bill Pmt -Check	02/11/2021	51722	Demco, Inc.	CD 2-ring Album...Multi-Disc DVD Album:	-527.33	6,659,251.08
Bill Pmt -Check	02/11/2021	51723	Ehrlich	14383673	-317.00	6,658,934.08
Bill Pmt -Check	02/11/2021	51724	Gale/CENGAGE Learning	149473	-41.58	6,658,892.50
Bill Pmt -Check	02/11/2021	51725	J.D. Power	579444017	-99.00	6,658,793.50
Bill Pmt -Check	02/11/2021	51726	Kanopy LLC	2021 Kanopy deposit	-10,000.00	6,648,793.50
Bill Pmt -Check	02/11/2021	51727	Konica Minolta Business Solutions	Brother printer contract coverage 01/01/	-44.00	6,648,749.50
Bill Pmt -Check	02/11/2021	51728	Long Mechanical/Plumbing	Preventative maintenance 1st quarter 20	-721.00	6,648,028.50
Bill Pmt -Check	02/11/2021	51729	Mergent Inc	134589	-490.00	6,647,538.50
Bill Pmt -Check	02/11/2021	51730	Midwest Tape		-142,522.01	6,505,016.49

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Accrual Basis

Canton Public Library
Transactions by Account
As of February 28, 2021

Type	Date	Num	Name	Memo	Amount	Balance
Bill Pmt -Check	02/11/2021	51731	OverDrive, Inc.	0721-1001	-2,694.56	6,502,321.93
Bill Pmt -Check	02/11/2021	51732	Scholastic Inc	2192927	-367.65	6,501,954.28
Bill Pmt -Check	02/11/2021	51733	Showcases	Vinyl 20 CD Album	-163.94	6,501,790.34
Bill Pmt -Check	02/11/2021	51734	ShredCorp	Scheduled shredding	-55.00	6,501,735.34
Bill Pmt -Check	02/11/2021	51735	Staples Business Advantage	1002673	-106.33	6,501,629.01
Bill Pmt -Check	02/11/2021	51736	State of MI - Dept of Licensing	MI boiler inspection (every 3 years)	-120.00	6,501,509.01
Bill Pmt -Check	02/11/2021	51737	T-Mobile	Mobile internet charges 12/21/2020 - 01	-91.68	6,501,417.33
Bill Pmt -Check	02/11/2021	51738	Tsai Fong Books, Inc.	Sekai ichi oishii washoku pasta no hon...T	-135.93	6,501,281.40
Bill Pmt -Check	02/11/2021	51739	West Group Payment Center	West Complete Library Sub - 02/01/2021	-138.00	6,501,143.40
General Journal	02/17/2021	1782	Paylocity Direct Deposits	Direct Deposits	-72,373.69	6,428,769.71
General Journal	02/17/2021	1782	Paylocity Taxes	Total Tax Liability Taken from PR Bank Ac	-26,300.75	6,402,468.96
Check	02/17/2021	EFT	Paylocity	Payroll Processing Fees - Payroll Date 02/	-1,444.28	6,401,024.68
Transfer	02/17/2021			Funds Transfer - Payroll Date 02/17/2021	-1,059.22	6,399,965.46
Check	02/17/2021	EFT	Nationwide Retirement Solutions	401A Employer Contributions for Payroll	-809.94	6,399,155.52
Check	02/17/2021	EFT	Nationwide Retirement Solutions	457b Employee Contributions for Payroll	-4,395.24	6,394,760.28
Check	02/17/2021	EFT	Nationwide Retirement Solutions	457br Employee Contributions for Payrol	-125.00	6,394,635.28
Check	02/17/2021	EFT	MERS - Pension	Employee Pension Deductions for the mc	-4,136.72	6,390,498.56
Deposit	02/17/2021			Deposit	1,425,970.70	7,816,469.26
Bill Pmt -Check	02/20/2021	51740	Davis-Craig , Lisa	Longevity Award - 25 Year	-500.00	7,815,969.26
Deposit	02/22/2021			Deposit	1,155.72	7,817,124.98
Bill Pmt -Check	02/25/2021	51741	Miscellaneous Vendor	Caitlyn Versele: Mileage reimbursement.	-30.82	7,817,094.16
Bill Pmt -Check	02/25/2021	51742	AmazonBusiness	A265GG3U5ZD0HS	-1,467.70	7,815,626.46
Bill Pmt -Check	02/25/2021	51743	Ann Arbor Cleaning Supply Co.	Chalet 308 paper towels 30/cs (5)...RP19!	-378.00	7,815,248.46
Bill Pmt -Check	02/25/2021	51744	AT&T Mobility (Cingular Wireless)	831922095	-183.16	7,815,065.30
Bill Pmt -Check	02/25/2021	51745	Baker & Taylor (114)	L4271142	-23.17	7,815,042.13
Bill Pmt -Check	02/25/2021	51746	Baker & Taylor (202)	L531202	-24.52	7,815,017.61
Bill Pmt -Check	02/25/2021	51747	Baker & Taylor (493)	L420493 2	-13.63	7,815,003.98
Bill Pmt -Check	02/25/2021	51748	Baker & Taylor (510)	L417510	-1,794.41	7,813,209.57
Bill Pmt -Check	02/25/2021	51749	Baker & Taylor (530)	L417530	-1,009.95	7,812,199.62
Bill Pmt -Check	02/25/2021	51750	Baker & Taylor (583)	L521583	-171.44	7,812,028.18
Bill Pmt -Check	02/25/2021	51751	Baker & Taylor (787)	L4247872	-55.98	7,811,972.20
Bill Pmt -Check	02/25/2021	51752	Basic	Monthly fee for Section 125 FSA plan adr	-813.12	7,811,159.08
Bill Pmt -Check	02/25/2021	51753	bibliotheca, LLC.		-3,941.71	7,807,217.37
Bill Pmt -Check	02/25/2021	51754	Blue Care Network	Coverage 03/01/2021 - 03/31/2021	-18,431.69	7,788,785.68
Bill Pmt -Check	02/25/2021	51755	Brodart Co.	219992	-106.13	7,788,679.55
Bill Pmt -Check	02/25/2021	51756	Bryant, Perry	Fat Tuesday - Paczki	-69.90	7,788,609.65
Bill Pmt -Check	02/25/2021	51757	Credential Check Corporation	Background check (criminal, employment	-74.98	7,788,534.67
Bill Pmt -Check	02/25/2021	51758	Crimson Multimedia Distribution, Inc.		-3,303.93	7,785,230.74

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Accrual Basis

Canton Public Library
Transactions by Account
As of February 28, 2021

Type	Date	Num	Name	Memo	Amount	Balance
Bill Pmt -Check	02/25/2021	51759	Demco, Inc.	Multi-disc DVD albums 8 cap (20)...Multi-	-102.65	7,785,128.09
Bill Pmt -Check	02/25/2021	51760	Dunn Rite Maintenance	Janitorial service for February	-4,800.00	7,780,328.09
Bill Pmt -Check	02/25/2021	51761	EBSCO Information Services	CG-S-27252-00	-68.86	7,780,259.23
Bill Pmt -Check	02/25/2021	51762	Ehrlich	14383673	-232.00	7,780,027.23
Bill Pmt -Check	02/25/2021	51763	FastSigns - Livonia	Signs, posts & installation: Curbside Parki	-658.87	7,779,368.36
Bill Pmt -Check	02/25/2021	51764	Fish Doctors	Maintenance fees...emergency service/h	-283.45	7,779,084.91
Bill Pmt -Check	02/25/2021	51765	Gale/CENGAGE Learning	149473	-144.89	7,778,940.02
Bill Pmt -Check	02/25/2021	51766	Innovative Users Group	IUG 2021 Virtual Conference 03/22/2021	-250.00	7,778,690.02
Bill Pmt -Check	02/25/2021	51767	Konica Minolta Business Solutions	Purchase of 3 new copiers/printers and c	-13,001.30	7,765,688.72
Bill Pmt -Check	02/25/2021	51768	Metcom	Single bar code lables 1,000 (10)	-418.00	7,765,270.72
Bill Pmt -Check	02/25/2021	51769	Miscellaneous Vendor	Pamela Letts - cookies for SC snack	-21.98	7,765,248.74
Bill Pmt -Check	02/25/2021	51770	Miscellaneous Vendor-ILL/MEL	Cornerstone University Miller Library - En	-50.00	7,765,198.74
Bill Pmt -Check	02/25/2021	51771	NorthStar Mat Service	Contractual mat service	-61.90	7,765,136.84
Bill Pmt -Check	02/25/2021	51772	Office Depot	31909112	-235.73	7,764,901.11
Bill Pmt -Check	02/25/2021	51773	OverDrive, Inc.	0721-1001	-3,885.41	7,761,015.70
Bill Pmt -Check	02/25/2021	51774	Plante & Moran	Progress bill for 12/31/2020 financial stai	-9,200.00	7,751,815.70
Bill Pmt -Check	02/25/2021	51775	Reliable Landscaping, Inc.	Snow Relocation 3 hours machine & oper	-675.00	7,751,140.70
Bill Pmt -Check	02/25/2021	51776	Skopczynski, Denise	Vision claim reimbursements: D. Skopczy	-400.00	7,750,740.70
Bill Pmt -Check	02/25/2021	51777	Sobczak, Deborah	Desk organizer...file organizer	-36.47	7,750,704.23
Bill Pmt -Check	02/25/2021	51778	Staples Business Advantage	1002673	-5.33	7,750,698.90
Bill Pmt -Check	02/25/2021	51779	Konica Minolta Premier Finance	KMBS 2 27 - Livonia Lease Payoff	-634.55	7,750,064.35
Bill Pmt -Check	02/25/2021	51780	Michigan Library Association	MLA 2021 Spring Institute group package	-350.00	7,749,714.35
Total 000-004 · Chase - Checking					932,167.50	7,749,714.35
TOTAL					932,167.50	7,749,714.35

Director's Report
March 2021

1. It has been one year of library operations during the pandemic. Our last day of full hours and services ended at 6:00pm Friday, March 13, 2020. I won't be recapping the entire year of library operations in this report any longer, and will only report on new information and services since your last meeting.

On February 23, we expanded curbside pickup by appointment to all of our operating hours; Monday-Thursday 10:00am to 7:00pm; Friday-Saturday 10:00am to 5:00pm; and Sunday 1:00pm to 5:00pm for patrons who are uncomfortable entering the library, are unable or unwilling to comply with our masking policy, or who want the convenience of staying in their car and having their checkouts brought to them. Self-Service holds pickup from the Holds Shelf remains an option, also. After reviewing and evaluating usage statistics and feedback from staff and patrons, we eliminated Lobby Pickups of checked out materials. This narrows the choices to two—curbside or the traditional Hold Shelf—and has already cut down on patron confusion. My thanks to Kat Bounds for working with her supervisors and staff on this.

On March 10 and 11, 2021, library staff volunteered at the Wayne County Health Department COVID-19 vaccination clinic at Schoolcraft College for eligible seniors living in Canton Township, Plymouth Township, and Plymouth. Our deepest thanks to Canton Township Supervisor Anne Marie Graham-Hudak and Canton Township Emergency Management Coordinator Will Hayes for working with Wayne County Executive Warren Evans to give Canton Township employees and Canton Public Library employees the opportunity to serve at the vaccination clinic for our residents. We saw many familiar patron faces and were able to provide the personal touch to our residents' vaccination experiences.

Individual staff each let Marian Nicholson know if they were interested in getting on the Township's list of municipal employees for whenever Phase 1C is announced (this is the Phase where library employees fall per the state plan) and gave permission to have their name and contact information released to the Township. Marian and I prioritized the list so that staff who have the most interpersonal public contact were listed first, and staff with minimal public contact prioritized last. We sent that list to Township Human Resources Manager Kerreen Conley, who followed up with each individual on the list and offered them the opportunity to volunteer on March 10 or March 11; for their participation, they would receive the vaccination themselves at the end of the day. Library staff participation in the vaccination events was voluntary and participants were required to use paid time off. Those who were not able or did not wish to volunteer remain on the list for Phase 1C vaccination.

The Township cannot say for certain at this time, but they hope to have future volunteer opportunities for Township and Library staff, which will allow those who could not make it this time to volunteer in the future. Those who do not wish to volunteer will remain on the Phase 1C list by priority grouping; we do not yet know when eligibility will be expanded to include Phase 1C.

We are currently allowed to operate at 50% capacity (staff, volunteers, and patrons combined). Since we reopened for browsing on October 1, we have set a maximum of under 10% capacity to ensure appropriate distancing and allow our reduced staffing to adequately monitor and manage behavior. As I

have previously stated, we have been monitoring occupancy and will consider increasing that when we more frequently approach/exceed that. That time has come. We have had several days, all of them Sundays, where we have approached/hit 100% capacity. We are seeing more patrons each successive Sunday; on March 7, we had to close the doors for about 20 minutes because we were at the maximum and we have 15-20 patrons waiting outside for patrons to leave so that they could be admitted. The department heads and I are discussing with our coworkers the logistics and patron management ramifications of raising the occupancy maximum to just over 10% in early April, and then we will continue to monitor and evaluate slowly increasing the maximum, particularly as the weather warms and as more of our residents are vaccinated.

I previously shared with you the other two dials we are prepared to turn, in addition to maximum occupancy: Operating hours and time limits in the library. At the moment, we are short two IT staff and one Building Monitor, and need those positions filled before we can expand our operating hours. We will evaluate and consider extending time limits once we have a handle on the “right” occupancy for the building.

2. This month you will continue your discussion of Kat Bounds’ document outlining the background on eliminating overdue fines and considerations the board should take into account. We look forward to your direction on how you would like us to proceed.
3. Also on the agenda this month is a presentation on the results of our research into Canton seniors from Community Relations Department Head Laurie Golden, Program Librarian Laura Fawcett, Information Services Librarian Tara Scott, and Communications Specialist Kaitlyn Minshall. I will ask during the “approval of agenda” that this presentation be moved up in the meeting.
4. The staff committee charged with looking at discovery layer products has submitted their recommendation, along with the full context for that recommendation as requested by the board. Our current website content management system (CMS) is end-of-life and we budgeted in 2020 to replace the CMS, and add other desired functionality that will streamline efforts and improve the patron experience. This work was expected to straddle the 2020 and 2021 fiscal years, but the 2020 portion was postponed during the pandemic. Those unused 2020 funds went into fund balance, and we need board approval to pull those funds into 2021 to fund the project in full this year. Our recommendation is to contract with BiblioCommons. The contract is also included in your packet and has been reviewed by our contracts attorney at Foster Swift. If the board approves the project and authorizes me to sign the contract, we will begin a 6-8 month design and migration process, and in the First Quarter Budget Amendment at the April board meeting, we will request an amendment to move an additional \$52,500 from fund balance to the 2021 IT budget so that we can complete the entire project in 2021 rather than the planned 2020-2021.

My thanks to Web Developer Courtney Luketich for leading this cross-functional committee in their research, analysis, report, and recommendation. The committee members are listed in the included documents.

5. This month you will continue your 2022 budget discussions. As in previous years, we are bringing specific items each month for board discussion and consensus, which will help us put together as complete a budget as possible when we present the first draft in July, second draft in August, and final budget for approval in September. Library taxes appear on the Winter tax bill.

Included in your packet this month is the background information on the library's compliance with the Patient Protection and Affordable Care Act (PPACA), as well as an analysis of the estimated fiscal impact if you decide to comply with the PPACA, or continue to be non-compliant with PPACA. My thanks to Marian Nicholson for her analysis of this subject.

6. In personnel news, on April 12 we will welcome Dave Ewick as our Information Services Department Head. Dave is currently the Director of the Southfield Public Library and is retiring from that position at the end of March. We are excited to welcome Dave and looking forward to the experience and knowledge he brings to our community.
7. Accountant Debbie McHugh continues to plan for our migration to the new State of Michigan Uniform Chart of Accounts, which goes into effect in 2022 and necessitates a reorganization of all of our account numbers. Quickbooks, our current accounting system, does not accommodate the longer account numbers the new Chart of Accounts requires. Debbie and Marian Nicholson have worked with Plante Moran and received feedback from other libraries to research governmental accounting systems. Our frontrunner is BS&A, which is widely used by municipal finance departments and has strong support from accountants and auditing firms. The project is budgeted in 2021, and we are awaiting legal review of the contract.
8. Marian and I are aware of the fact that the federal FFCRA/EFMLA extension ends March 31, and we will keep you posted on any developments.
9. April 7 is Library Giving Day. We did not participate in this national fundraising day in 2020 due to the pandemic, but will re-engage this year. Keep an eye out for communications from the library encouraging donations to our endowment fund, held by the Canton Community Foundation/Local Impact Alliance.
10. On April 29, we will institute PINs (personal identification numbers) for all library accounts as an added measure of security. Patrons will be required to have a 7-13 digit PIN when they use a self-checkout or when they login to My Account on our website. This was announced in the March newsletter that was sent out at the end of February, and will be repeated in the April newsletter (released at the end of March) and via our social media channels. In addition to improving security of patron data and reducing fraudulent checkouts, use of PINs is required by BiblioCommons so this dovetails with that project.

Respectfully submitted,
Eva Davis



Fine Elimination: Factors to Consider

Summary

This report is intended to provide a starting point for Library Board discussion about the potential elimination of fines at Canton Public Library. The elimination of fines is a policy and financial/budgetary decision that can only be made by the Library Board. If the Library Board wishes to pursue this, the Circulation Policy will be revised and brought to a future board meeting for approval. We are not requesting Board action at this time.

It outlines the current fine schedule and practice, and reviews the common considerations presented in recent reports, popular articles and research (to the extent available). These common considerations include: the purpose of fines, the impact of fines on different demographic segments, the impact on relationships between patrons and staff, budgetary impact, and advocacy by professional library associations.

This report does not provide a specific recommendation for action; it is intended to provide an overview of the fine-free landscape for Library Board discussion and, if there are questions or requests for further details, library staff will provide the information and answer those questions.

Background

Library fines are currently levied by Canton Public Library per day overdue, based on the type of material. Books and non-fiction DVDs are billed \$.20/day, and feature DVDs and games are billed \$1.00/day, with a maximum fine per item of \$5.00. A complete schedule of fines is included as an appendix to this report. Patrons with more than \$20 in overdue fines may not check out items.

The same schedule of fines is levied for materials borrowed by patrons from reciprocal libraries.

It is important to note that fines are distinct from fees. The library charges the following fees for damaged and lost items:

- A replacement fee equivalent to the price of the item at the time it was ordered,
- A processing fee of \$3,
- An additional billing fee of \$1 for items kept past 21 days, and finally
- A collections fee of \$10 for patrons who exceed \$35 in combined fines and fees, and who have not paid within 45 days. No patron is sent to collection exclusively for fines, but fines may make up a portion of the \$35 total.

Fines may be waived or reduced at the discretion of the circulation staff. Fees for damaged or lost items may also occasionally be waived, however the collections fee is only waived at the direction of the Circulation Services Department Head or Supervisor.

A summary chart of revenues for the last several years, and the projection for this fiscal year, is included later in this report. Revenue from fines has been decreasing since the implementation of new courtesy features by the library in 2018 and 2019.

Patrons are provided a courtesy notification of impending due dates on checked-out materials two days prior to the date due. Since 2018, patrons have the option of text notifications in addition to email and phone notification.

As of May 2019, items that do not have holds waiting are automatically renewed up to 4 times. Patrons may also request a special loan period for an item, as long as it has no holds, at their initial check-out.

Patrons receive overdue notifications 4 days after an item is due, and again at 10 days. On the 21st day after an item is due, if it has not been returned, the patron will get a notice that the item is being billed to their account.

Considerations

- Purpose of fines

The intent of the current policies and practices for fines at Canton Public Library is to encourage on-time returns. Fines have historically been understood as providing a meaningful incentive to patrons to return materials by their due dates, and thereby make those materials available to the maximum number of interested patrons in a timely fashion.

There has been a recent trend towards fine elimination in public libraries across the U.S., and many Michigan libraries have followed suitⁱ. While there are not many recent evidence-based studies about the impact of fines on patron return behaviorⁱⁱ, there have been many popular articles and single-system reportsⁱⁱⁱ which tend to be in favor of library fine elimination. In considering this type of self-reporting it is important to note the presence of selection bias – only those systems with positive results tend to report out. This type of reporting may or may not accurately reflect common outcomes.

Recent popular articles and reports tend to focus on three intended functions of library fines:

- Encourage on-time returns
- Penalize for keeping items out of circulation (Encourage availability of materials)
- Encourage personal responsibility

Generally, system self-reports tend to emphasize the increase in book returns once fines are eliminated, improvements to access (quantified by citing smaller numbers of blocked patron accounts following the policy change), and also to highlight anecdotal stories of positive return-to-the-library experiences shared by individual patrons.

There are also a number of popular articles in professional library publications in recent years that debate the pros and cons of library fines^{iv}. In addition to the above, these articles also tend to note that more traditional patrons may expect and desire that those who keep materials past their due dates be punished for depriving other patrons of access, and breaking their social contract with the library. This idea that patrons who are diligent in following the borrowing rules may be upset by elimination of fines is something that has been brought up as a concern by Canton staff in discussions on this topic.

- Demographic impact

One major theme in articles about fines in recent years has been the disparate effects and perceptions of fines for different demographic sectors. Unlike the discussions around the effectiveness of fines in driving patron return behavior, there is evidence that suggests library fines disproportionately impact lower-income patrons. Many large cities, such as San Francisco, Seattle and Chicago, have cited this as one of their main motivations in eliminating fines.

For a family with less income, it can be difficult to pay off fines that accrue, and it may not seem worth the risk of the initial check-out. This has a further disproportionate effect in that these families are also less likely to be able to independently afford the materials, computer access, and other resources which the library provides, so that chilled access to library resources in practice removes these entirely from the families reach.

Vice versa, a family with more income may not experience a fine as a deterrent or barrier. They may even perceive it positively, as a “donation” of sorts towards an institution they cherish.

Outside of income, there is again less evidence-based literature. However there is at least one recent report on race and libraries^v that suggest fine practices with a high-level of discretion, such as the one in place at Canton, have the potential risk of disparate effects on patrons of color. This seems worth stating given the difference in responses by ethnicity in the Community Needs Assessment conducted by Cobalt Community Research for Canton in 2019.

The Community Needs Assessment included two questions related to fines:

- 24. Please note the main barriers that keep your household from using the library more often? (Mark up to 3.)
- 26. Which four potential library services would make the library experience better for you and your household? (Mark up to 4.)

For question 24, no one reported that fines were a barrier to library access. Given the argument made in many of the large city reports, it is interesting to observe that the Canton survey responses related to overdue fines did vary by income, with it being slightly higher in rank for lower income and highest income brackets, and less important for those with middle-tier income.

For question 26, 5% of survey participants selected “eliminating overdue fines” as a service that would improve their experience of the library. This is low in comparison to other options presented (9th out of 12), however, it is important to note that responses more closely corresponded to ethnicity than anything else, followed by age. Looking only at non-white-identified respondents, “eliminating overdue fines” moves up in importance to 6th out of 12. For Black/African American patrons specifically, it ranked 3rd out of 12. Complete response data for this question is included as an appendix to this report for your reference.

- Impact on relationship between patron and staff

Another major theme in discussions about library fines is the stress it places on library staff, and the tone of these interactions for patrons. This topic is discussed at length in *LONG OVERDUE: Eliminating Fines on Overdue Materials to Improve Access to San Francisco Public Library*^{vi}. While this and similar self-reports are widespread, again there is little evidence-based research to back up these arguments.

For Canton, public perception of the library has been consistently very positive, as reported in the Community Surveys completed in 2019 and earlier, in spite of the presence of fines.

Staff have not reported significant stress as a result of patron interactions around fines. Very few staff members have directly advocated for fine elimination, however when it has been discussed, a number of circulation staff do think it would be wonderful to never have to discuss fines with patrons. Those that support the idea of fine elimination primarily focused on a desire to support families in need, not the stressful nature of the interactions.

When we returned to the library after the initial closure for Covid-19, staff were instructed to waive fines on a regular basis where reasonable so that they did not have to handle money as frequently. While staff reacted positively, it does not appear to have significantly altered the quantity of fines being collected in practice. This may be because there are also staff who view waiving fines as “letting the patron get away with something,” similar to the more traditional patrons noted under “purpose of fines” above.

- Budget impact
 - Direct

Fines are a source of revenue for the library. While fine revenue has been declining as noted above, it is still significant.

Year	Fines Revenue
2018	\$94,740.60
2019	\$56,800.00
2020*	\$16,479.41
2021 (projected)	\$30,000.00

*As a result of COVID-19 closure, materials were automatically renewed regardless of holds, between March and September of 2020, resulting in no collection of fines during this period. Many fines were also waived during the initial re-opening process, as noted in the section above.

- Indirect (staffing, notifications)

While we do not routinely track the amount of staff time and resources devoted to fine processing, it is a routine part of the day for staff at the checkout desk. In practice, collecting fines only adds a moment to each interaction. For patrons with fines on multiple cards there potentially would be a meaningful amount of time saved, however this is a minority of the fine interactions we see.

Billed item(s) and processing fee(s) are typically a much lengthier topic of conversation with patrons than fines. Patrons who are billed for items are usually not very happy about the charge. Elimination of fines does have the potential to make these conversations more challenging, because waiving all or some fines also present on the account is often part of the negotiation towards persuading a patron to pay for the replacement cost of billed items. For example, a patron with a \$40 charge, \$10 of which is fines and \$30 of which is associated with a damaged item often is more amenable to and feels better about paying the \$30 if they know the \$10 is being waived.

Elimination of fines also potentially could increase the amount of patrons who are sent to collections, since the account would no longer be blocked from new check-outs when the patron accumulates \$20 in fines. Additionally, for lost items, the patron would not necessarily be aware that the amount they owed exceeded the \$35 collections threshold until after the 21 day mark because this amount is not billed for a lost item until that point. Maintaining our current notifications practices at the 2 days prior, 4 and 10 days after marks even in the absence of fines could help mitigate this risk.

- American Library Association and Michigan Library Association

In 2019, the American Library Association issued a Resolution on Monetary Library Fines as a Form of Social Inequity^{vii} which “urges libraries to scrutinize their practices of imposing fines on library patrons and actively move towards eliminating them.”

The Michigan Library Association does not currently take a position on fines.

Appendix A

Borrowing Schedule

Item Type	Item Limit	Loan Period	Fine/Day	Holds	Renew
Book Discussion Kits	-	60 days	\$1.00		
Books, Large Print, Audiobooks, Storytime Kits, Puppets, CDs, Nonfiction DVDs	-	21 days	\$0.20		
DVDs	-	7 days	\$1.00		
Magazines (Back Issues)/Comics	-	7 days	\$0.20		
Video Games	5	7 days	\$1.00		
Lucky Day Books/CDs	2	7 days	\$0.20		
Lucky Day DVDs	2	3 Days	\$1.00		
Cd Players*	1	21 days	\$5.00		
Magnifiers*	1	21 days	\$5.00		
* CPL or PDL Library Card Holders Only					

Appendix B

Community Needs Assessment, Question 26 Responses

26. Which four potential library services would make the library experience better for you and your household? (Mark up to 4.)

Possible responses:

- Home delivery of materials
- Smart phone/tablet device support
- In-library use of special equipment (laminator, etc)
- Media creation (podcast, video green screen, etc)
- Notary public
- Test proctoring
- Video conferencing
- Personalized reading/viewing suggestions
- Reservable study rooms
- Eliminating overdue fines
- Simplified logins for electronic media
- Library super fan experiences

Percent of respondents who included “Eliminating overdue fines” in their “top four potential library services would make the library experience better for you and your household,” by demographic.

Ethnicity	American Indian or Alaska Native	-
	Middle Eastern/North African	20%
	Asian Indian	13%
	Other Asian	17%
	Black/African American	31%
	White	3%
	Hispanic	13%
	Other	14%
	Prefer not to answer	15%

Age Group in Home	0-4	-
	5-14	11%
	15-19	9%
	20-34	5%
	35-54	9%
	55-74	5%
	75 or older	8%

Household Income	\$25,000 or less	-
	\$25,001 to \$50,000	7%
	\$50,001 to \$100,000	4%
	Over \$100,000	7%

Endnotes

ⁱ <https://www.freep.com/story/news/local/michigan/2020/02/12/michigan-library-overdue-fine-late-fee/4677904002/>

ⁱⁱ There are several frequently cited studies from the 1980s - Little, P. (1989). MANAGING OVERDUES: Facts From Four Studies. *The Bottom Line*, 2(2), 22–25.; Hansel, P., & Burgin, R. (1983). Hard Facts About Overdues. *Library Journal*, 108(4), 349; etc – and one from 2013 that focused specifically on two academic libraries - Sung, J. S., & Tolppanen, B. P. (2013). Do Library Fines Work?: Analysis of the Effectiveness of Fines on Patron's Return Behavior at Two Mid-sized Academic Libraries. *The Journal of Academic Librarianship*, 39(6), 506–511.

ⁱⁱⁱ For example:

- Depriest, M.J. (2016). Removing Barriers to Access: Eliminating Library Fines and Fees on Children's Materials. Retrieved from <http://www.cde.state.co.us/cdelib/removingbarrierstoaccess>
- Spielman, F. (2019, October 30). Lightfoot's decision to eliminate library fines triggers 240% increase in book returns. Retrieved from Chicago Sun-Times website: <https://chicago.suntimes.com/news/2019/10/30/20940677/chicago-public-library-no-fines-book-returns-increase-lightfoot>
- The case against library fines—According to the head of New York Public Library—Quartz. Retrieved from <https://qz.com/1158839/the-caseagainst-library-fines-according-to-the-head-of-the-new-york-public-library/>

^{iv} For example:

- Morehart, P. (2018, June 1). An Overdue Discussion: Two takes on the library-fine debate. Retrieved from the American Libraries Magazine website: <https://americanlibrariesmagazine.org/2018/06/01/library-fines-overdue-discussion/>
- Epstein, S. (2017, December 19). To Fine or Not To Fine. Retrieved from the Public Library Association Online website: <http://publiclibrariesonline.org/2017/12/to-fine-or-not-to-fine/>

^v Advancing Racial Equity in Public Libraries Case Studies from the Field - Government Alliance on Race and Equity. https://www.racialequityalliance.org/wp-content/uploads/2018/04/GARE_LibrariesReport_v8_DigitalScroll_WithHyperlinks.pdf

^{vi} <https://sfpl.org/uploads/files/pdfs/commission/Fine-Free-Report011719.pdf>

^{vii}

http://www.ala.org/aboutala/sites/ala.org.aboutala/files/content/governance/council/council_documents/2019_ms_council_docs/ALA%20CD%2038%20RESOLUTION%20ON%20MONETARY%20LIBRARY%20FINES%20AS%20A%20FORM%20OF%20SOCIAL%20JUSTICE%20Revised%201_27_0.pdf



Discovery Layer Committee Recommendation

Final – March 10, 2021

Project Recommendation Packet

With the known issues of end-of-support life for our current web management system, Drupal v7, and a need to enhance integration between the Sierra catalog, our website's patron management system, and e-resources subscriptions, the library has investigated solution alternatives. During our research, which included consideration of numerous options and vendor offerings, we have learned that the choices which meet our criteria are very limited. The details of this research is attached, which includes our recommendation to address the identified issues through use of products from BiblioCommons. Their contract is also attached for your review. We are requesting your approval to move forward with this project, to enter into the contract, and provide additional funding beyond existing amounts in the 2021 budget for its implementation, via a budget amendment to be submitted at April's meeting.

Committee Members

The committee thanks Courtney Luketich for her leadership and respectfully submits this recommendation on March 10, 2021:



Katerli Bounds
Circulation Department



Lisa Craig
Information Services Department



Gale Forster
Circulation Department



Laurie Golden
Community Relations Department




Megan Hathaway
Information Services Department



Courtney Luketich
Information Technology Department



Rudie Noble
Information Technology Department



Timothy Sills
Information Technology Department



Carl Swanberg
Information Technology Department



Jack Visnaw
Information Services Department



Discovery Layer Committee Recommendation

Final - March 10, 2021

Executive Overview

Our forced closure and patrons' desire for risk-free access to resources in 2020 has generated significant demand for the library's electronic content. Online checkouts increased 55% last year, but perceptions of what constitutes quality delivery from online services have also changed. Predictive services like Netflix, social media platforms with tailored content, and simple-to-use ordering systems like Amazon's have set a high bar for virtual services. This highlights what we've known for some time: The outmoded and confusing user interfaces of the standard Innovative Sierra WebPAC (catalog) and CPL's Drupal CMS (web platform) leave much to be desired. As a result, the library initiated a formal committee to consider potential corrective actions.

To accomplish CPL's Aspiration to "respond to community and individual needs in a way that helps everyone pursue their best life through personalized solutions and lifelong learning," we must simplify the website content creation processes that highlight available library resources. Use of reusable, attractive interfaces and intuitive design will improve the "browsability" of the collection, increasing the chances of materials circulating. Additionally, we must expand the catalog search's function and flexibility to incorporate discovery of related e-resources, so that patrons are presented with a unified set of search results. This will significantly reduce user frustration when searching for content that is not in the catalog, but is available from another content provider or in multiple formats.

Our virtual branch attracts 20,000 to 25,000 monthly visits and deserves to be brought up to the standards set by commercial online services and the level created through the renovations of our physical space. Our defined strategic vision states, "We are a physical and virtual extension of the world. We provide services and resources to use in the building or access remotely from a phone, laptop or tablet. We will be where our patrons need us." Changes to allow greater customization and personalization of our website are needed to achieve this. Just as other libraries have experienced, we predict that patrons will feel more involved with our services and collections and will increase their use of the resources available to them if we provide an enhanced user interface that simplifies searching and results presentation.

Innovative, the publisher of Sierra, has not offered an enhancement to their WebPAC product; rather, they have published less than stellar add-on products to address the shortcomings. After reviewing additional product offerings and considering custom programming options, the committee is recommending the contracting of subscription-based services from BiblioCommons. They would host our website on their servers, which provide an extensive set of content management functions. We'd include their discovery layer so that searches include results from both our catalog and supported e-resource database content, providing the user with unified search results. Related sub-modules for events and MARC record management would be included. Implementation fees would approach \$45,000 (plus a 20% contingency) and take 6 to 8 months. Funds had been budgeted in 2020 for such a project but were returned unused at year-end. The subscription cost is a new, but a budgeted annual expense projected to be around \$60,500, depending on the final set of modules required. The committee requests the Library Board's approval of the attached budget amendment so this project may move forward as quickly as possible.

Strategic Goals Led to an Action Committee

Prompted by the approaching end of life for Drupal v7, on which our current website is built, along with other factors detailed in Appendix A, the Information Technology Department (IT) in 2018 began considering additional ways we might achieve the goals defined in the library's 2020 strategic plan. In pursuit of these goals, the IT department sought out feedback on our existing website and catalog, researched discovery layers (i.e. a newer catalog search interface) and website content management systems (CMS) (i.e. website creation tools). Additionally, the committee received feedback via usability testing, and solicitation of input from our patron-facing departments, Information Services and Circulation Services.

Those results reinforced our impression that the current catalog's search functionality and website content often fails to meet patron expectations, leading to frustration and confusion that certainly doesn't exemplify CPL's "best-in-class" goals. We recognized that a better user interface, along with better integration between the catalog and e-resources, were the key changes needed. These enhancements would meet patron expectations, model best-in-class performance and service, and be able to meet patron needs wherever they are (inside or outside of the library), while increasing circulation statistics year-over-year. With the pandemic generating greater demand for digital resources, we found the identified shortcomings to be an even greater detriment to achieving our strategic goals.

This prompted the formation of a formal review committee. The evaluation of CMS and discovery layer options would be a multi-departmental effort. Information Services (IS) staff members specialize in our collections, the online curation of them, and assisting patrons to have meaningful encounters with provided materials. Community Relations's (CR) input for web-specific decisions is desirable from a marketing and branding perspective, along with their expertise in event management (where a new product could reduce existing issues with having to manipulate and synchronize multiple calendars). The Circulation Services Department (CS) focuses on ease-of-use considerations for the patron.

The committee had the objective of determining the best products and corresponding company or organizations with which to work to migrate select website content to a new CMS in an effort to enhance our web presence and potentially recommend a discovery layer. Building upon the prior IT efforts, committee members reviewed options for migrating our system to a newer version of Drupal, along with currently available products and services. This market review (detailed in Appendix B) involved gathering information on available products, identifying the features and functions important to CPL, and viewing demos.

Improvement Options

Information in Appendix A details arguments against pursuing a website migration from Drupal v7 to v9. Additionally, that appendix explains the value placed on creating an online experience that is uniform from component to component. Having a discovery layer from one vendor that uses a different CMS from our website built on Drupal would miss that goal.

The product comparisons and decision processes (detailed in Appendix B) led to the selection of products whose designs were primarily focused on the needs of public libraries. As a result, further consideration was given to the industry-specific webhosting companies, BiblioCommons and Communico. Additional

efforts were extended to compare their offerings (detailed in Appendix C), which included customized demos, hands-on trialing experiences, analyzing quotes, talking with reference sites, and reviewing their migration, implementation, and maintenance processes/requirements.

Recommendation

The need to provide an enhanced user experience for our online patrons is clear, and given their increased expectations for technology, it makes sense that we select a commercial-grade solution. With the lingering effects of COVID, the timing for this as a 2021 initiative seems ideal. Thus, as detailed in Appendix D, the committee recommends implementing industry-leading products from BiblioCommons for our website's hosting and content management tools, discovery layer services, and event management.

The committee believes BiblioWeb (the web hosting product from BiblioCommons) with its tight integration with BiblioCore (their discovery layer) is the best solution for CPL. Its implementation will result in greater efficiencies, allowing changes and updates to be more timely and collaborative. A content refresh of our website will present a modern and easy-to-use online environment for our patrons to utilize, one that effectively highlights our content and available materials. Additionally, the BiblioEvents module is included at no additional charge. BiblioWeb, BiblioCore, and BiblioEvents were made to work together, so they integrate seamlessly.

Associated Costs

Our current website's implementation has minimal costs associated with its running and the maintenance of its current features — essentially only the cost of staff hours for content generation and a portion of the library's overall server resources. Moving to a subscription-based service does introduce a new annual expense, one that had been anticipated and included in this year's budget. However, we had expected to begin implementation of such a project last year, so the expected implementation fees had been included in the 2020 budget. Due to the libraries' COVID closure, the project was postponed. The projected funds were not used and were "returned" as part of last year's fourth-quarter budget amendment with the expectation they'd again be requested in 2021 via another budget amendment, which is attached.

BiblioWeb A fully-hosted integrated content management system. Includes theming, training, support and upgrades. Includes BiblioEvents.	Rate: \$0.139434/pop. or \$40,000 minimum. One-Time Implementation Fee: \$27,122. Annual Subscription Fee: \$40,000.
BiblioEvents Integrates fully with the BiblioCore catalog, and provides staff tools to manage all library events.	Included with BiblioWeb at no charge (regular cost: \$2,100 implementation, \$5,000 annual). One-Time Implementation Fee: \$0 Annual Subscription Fee: \$0

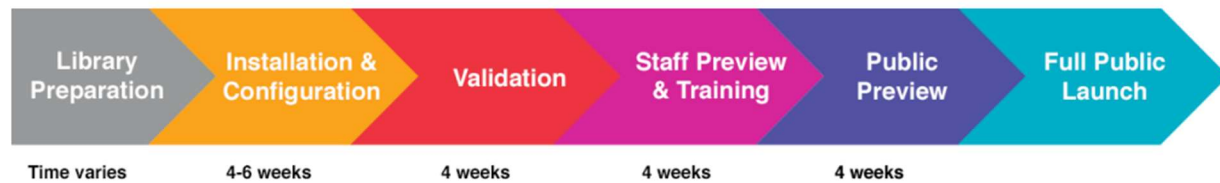
<p>BiblioCore Includes e-content integration and pre-populated award-winning and bestseller listings. The only element that is recommended but not included is cover art. BiblioCommons recommends that libraries subscribe to either Syndetics Select or Content Café for this additional content.</p> <p>BiblioCore is hosted, but the ILS connector requires a local server with Tomcat installed per BiblioCommons specifications.</p>	<p>Rate: \$0.1027044/pop. or \$12,500 minimum</p> <p>One-Time Implementation Fee: \$15,536. Annual Subscription Fee: \$12,500.</p> <p>Annual Content Café Subscription: \$0.00 CPL has an existing LibraryThing subscription, an acceptable substitute for Content Café.</p>
<p>BiblioCloudRecords - OverDrive and Hoopla Provide in BiblioCore the subscriber's holdings as exposed via that provider's subscriber API key an automatic record creation and indexing for search and record removal for expired content. (not including Hoopla music records).</p>	<p>Rate: 15% of Core, minimum \$5,000 <i>From May 13, 2020 quote</i></p> <p>One-Time Implementation Fee: \$500. each Annual Subscription Fee: \$5,000. first provider \$3,000. each after 1st</p>
<p>Project Totals</p>	<p>Subscription Fees: \$ 60,500. [budgeted] Implementation Fees: \$ 43,658. [requested] Contingency (~20%): <u>\$ 8,842.</u> [requested] Total: \$ 113,000.</p>

Timeline

BiblioCommons stated we should expect a minimum 6-month implementation and training window for BiblioCore, BiblioWeb and BiblioEvents but to allow 8 months for potential delays and extensions for CPL-specified requests. Below are some of the timeline details provided in their initial project planning documents.

Prior to this timeline, however, **an important preparatory step must be completed before any BiblioCommons work can begin.** Our Sierra system must have the pin-code login feature enabled. Although this security feature's activation is a simple change to a system configuration setting, the ramifications for the patron and overall library operations is huge. Our Community Relations Department has recommended this change only be made after a time window of extensive communications with our staff and patron base that includes three newsletter mentions. Once this change has been successfully enabled, the BiblioCommons implementation timeline can begin. Pin-code activation is currently on schedule for April 29, 2021. This introduces the **possibility of going live with BiblioCommons sometime between early November 2021 and year-end.**

BiblioCore



Phase 1: Preparation of Documentation of the Libraries' Operating Environment

Timeline: Flexible

Library: Completion of surveys and installation of a Tomcat server

BiblioCommons: Verify that Tomcat is installed correctly and remote access is available

Phase 2: Installation & Configuration

Timeline: 4-6 weeks

BiblioCommons: Connector installed, data imported and mapped, branding completed, site configured and tested

Phase 3: Validation

Timeline: Flexible, but recommended to be at least 4 weeks

Library: Validation of the catalog against a test script and identification of key issues to be resolved

BiblioCommons: Resolution of key issues for staff preview

Phase 4: Staff Preview & Training

Timeline: Flexible, but recommended to be 4 weeks

Library: Staff training and engagement, identification of key issues for public preview

BiblioCommons: Resolution of key issues for public preview

Phase 5: Public Preview

Timeline: Flexible, but recommended to be 4 weeks

Library: Public promotion of new catalog, identification of key issues for full public launch

BiblioCommons: Resolution of key uses for launch

Phase 6: Full Public Launch

Timeline: Flexible

Library: Deployment of website integration. Switching primary catalog to BiblioCore

BiblioCommons: Resolution of key issues for launch

BiblioWeb and BiblioEvents

Preparing for Hard Launch (new website becomes default website)

Preparation of Systems and URL: 3 weeks before launch

Preparation of Content: 3 weeks before launch

Appendix A - Considerations

The Drupal Content Management System (CMS)

Our website's current content management system is Drupal v7. It provides tools for software developers to create and maintain advanced webpages with less effort than native HTML coding. Originally, this version was scheduled to go end of life in November of 2020, but due to its popularity and the number of websites running this version, that date was moved to November 2021 to provide more time for conversions to complete. Recently, it was again delayed to 2022 due to impacts related to the pandemic. We expect no further delays.

In order to meet security standards, we face a major, time-consuming, and costly upgrade no matter whether we upgrade to Drupal v9 or completely change our website's content manager. Drupal v8 is no longer an option, because it is actually scheduled for end of life earlier than v7 at the end of this year.

In 2015, when it became necessary to migrate from Drupal v6 to a newer version, two options were considered by CPL. An estimate was created by a Drupal developer, Commercial Progressions, for migrating the website to Drupal v8. The estimate was \$74,520. The second option considered how another local library had hired a contract developer from the company, allowing the library to perform their own less-significant update to Drupal v7 for around \$23,000. There was also a budget of \$7,500 per year for outside services for continued support if required. Although CPL did not migrate to Drupal v8, this quote gives us an idea of the costs associated with a major migration (such as a two-version upgrade) within Drupal. Our upgrade to v7 took nearly a year to complete and resulted in no major patron-facing improvements to its design.

The huge effort to convert a website from one version of Drupal to another has negatively impacted numerous organizations. There has been an industry-wide migration to other CMS platforms, most notably WordPress. BiblioCommons has published an outstanding white paper that documents this trend, which describes its reasoning for migrating its own products from Drupal to WordPress. A copy is attached to this document for your reference.

Benefits to a Commercial Grade System

Over the last 30 years, public library websites have devolved into Frankenstein monster-like mash-ups of various eContent silos, online databases, blogs, event platforms, and more. The catalog and website are separate and independent from the other entities. Due to this incongruous hodgepodge, user experience is terrible, and patrons often have to log-in multiple times to access content, place holds, or register for an event. What is needed are products built to create one seamless integrated platform for a unified online library experience. This way, patrons easily can access their accounts and place holds from anywhere on the website — not just in the catalog.

Also, commercial products constantly are being enhanced; vendor teams work to ensure their products keep up-to-date with accessibility and ever-evolving web design standards. When a website goes live, it's likely to look great, but without a team of programmers with the time to constantly iterate, improve, manage upgrades and patches, and keep up with the newest standards of the web, the library's website

can become outdated soon after it launches. With commercial products, you have a whole team of developers, designers, and engineers working not only to maintain your library's website, but to evolve constantly the tools available to our staff to keep up with the rest of the web. Such upgrades are part of standard annual pricing. For libraries that already have web maintenance staff, commercial web hosting empowers the library to redistribute their expertise to focus on the most creative use of the provided tools.

Typically, commercial product publishers work with experts in the areas of security, privacy, accessibility, and analytics. They invest in continuous improvements to ensure that libraries are consistently at the forefront of internet best practices. Releases are tested thoroughly against all popular device platforms, browsers, and languages, ensuring no patrons inadvertently are left behind. Ongoing innovation is carefully paced and planned, not coming at the expense of the system's stability or security. Leading product publishers consistently lead the way with innovation, often defining new feature categories and setting the bar for other publishers. BiblioCommons has demonstrated itself as an innovator.

Innovative Interfaces Inc. (III)

Sierra's publisher, Innovative Interfaces Inc., had been working on a new ILS product that would allow them to merge their popular Sierra product with Polaris, another ILS they also sell. Encore was being designed to incorporate the behaviors of what commonly are referred to as a discovery layer. It initially was directed toward academic libraries but had a stated goal to embrace public libraries soon after.

As Innovative shifted its focus toward this new platform, we began placing an increased value on solutions that work with ILS products beyond Innovative, since adding this offering would further lock us into a reliance on this vendor. Their development work was being considered a new product, thus licensing its use would not be included as part of our annual maintenance payments. Rather, it would require a major purchase.

Recently, however, III was purchased by ProQuest, which has announced a number of modifications to its product development focus, including Encore product development. It has repackaged other existing product content to create a public library-focused discovery layer product named Vega. It is available now, but only for customers using its hosted version of Sierra. It has not announced any plans to make it available to stand-alone sites such as CPL.

Academic Focus vs. Public Library Focused

Discovery layers have traditionally had a more academic library focus due to their metadata weighting methods, which provides an alternate presentation of a collection's content, both electronic and physical. Although most discovery layers were weighted with the academic library in mind, a few products such as BiblioCommons were designed with a public library focus, and it shows. BiblioCommons is the public library market leader, has been the product option most discussed by our IS staff, and is the most well-loved of all options presented thus far. Several years ago, III provided CPL a trial of its Inspire product, an early adaptation of a discovery level tool. Its academic focus left a sour impression of such installations.

Other Considerations

One important aspect of making a web platform change is ensuring a uniform user experience between the catalog and the main website. Likewise, should use of a discovery layer be introduced, it needs to retain that same look and feel without the sense of switching between sites or products. Thus, we concluded the best option to ensure a common user experience was to have all of the major website components provided by the same developer.

Recent increases in the materials budget as part of efforts to meet QSAC guidelines has prompted Information Services to suggest consideration be given to implementing a discovery layer in 2021. New functionality like booklists would allow these new materials to be better highlighted and curated for our patrons.

Patron privacy and security have always been a concern for CPL. Enabling an existing security layer of protection to the login process has been under consideration. User pin-code activation is required by some discovery layer products, which would be desirable, but would introduce another potential patron frustration.

It is important to consider existing internal workflows. Today, the primary method for generating web content is via a blog post. It allows multiple people to take part in the content generation process while maintaining a level of independence for the website manager. We believe looking for a CMS with strong blog post capabilities should be an important point of consideration.

Appendix B - Option Selection Process

The committee began the selection process by identifying available products as well as the important features and functions for CPL. The identified features and functions include: integration with Sierra; a design focus on public libraries; support for Overdrive, Hoopla, CloudLibrary, and Kanopy; and support of a large meta-data library for flexibility in searching. In addition to the other considerations identified in Appendix A, the committee discussed satisfaction levels with Sierra and the possibility of moving to a different ILS in the future. We also looked at the need and desire to enhance additional functions such as events management and whether the discovery layer and website should be selected together or independently. Although the product options covered a wide range, most were found to be a poor fit, failing to meet our targeted needs and feature set.

Throughout this process, there was a focus on finding ways of providing patrons a more pleasant website experience, especially in the areas of account management, catalog search, and overall ease-of-use.

Options Considered

The committee considered:

- Drupal/API v9 upgrade
- EBSCO Discovery Service
- Communico
- BiblioCommons
- III/Proquest offerings:
 - Summon, Vega, Inspire, and Encore
- Open-source discovery layers:
 - VuFind/Pika, Blacklight, Aspen, SeeSearch
- LMS vendors with an exclusive discovery layer:
 - ExLibris' Primo, OCLC's Worldcat Discovery

Options Considered but Not Pursued

EBSCO's EDS discovery layer was trialed as part of the MI State Library's pilot program and did not score well. A well-known company operating within the academy library space, they also offer a website builder with content manager, and an open-source library management system. Currently, however, they do not offer any calendar or event management modules. EBSCO quickly was ruled out for being too tailored to the academic library space.

Innovative Interfaces, Inc. (III) inherited ProQuest's Summon, a discovery layer product, following their merger. It currently doesn't have a Sierra interface, though one is in development. Summon also was ruled out since it was created for and actively marketed in the academic library arena. As noted in Appendix A, III's previous development effort, Encore, appears to have been back-burned or withdrawn in lieu of a new discovery layer offering, Vega, which reportedly was created for public libraries. It, however, has only recently entered the general product availability stage. Even so, Vega is initially only available to Sierra customers running on the III shared hosts. III does not offer a website builder/content manager or a calendar and event manager.

OCLC's Worldcat Discovery also was ruled out as it is stronger in the academic library market and is only available with the Worldshare ILS. Similarly, ExLibris' Primo was ruled out for primarily targeting users of the Alma LMS and for having a strong focus in the academic library arena.

A few companies were identified as being in the discovery layer market (but without a web CMS component), however, they are open-source, requiring significant developer support (a better fit for large academic libraries desiring to customize their offerings), or were not strong enough contenders for additional research into their offerings. These include Aspen from Turning Leaf Tech, SeeSearch, VuFind/Pika, and Blacklight. VuFind, upon initial investigation, did not appeal to staff members. They found the interface confusing and did not think patrons would understand what to do with it. Blacklight similarly was disliked by staff.

The Short List

Communico was considered not only because of its website builder and content manager, but an array of other integrated products, including digital signage, event manager, and room-booking modules. They also have a discovery layer in development, which was delayed by the 2020 pandemic, but is now expected later in 2021. We considered either using only their website builder and content manager with another company's discovery layer or delaying the discovery layer decision until they came out with their product.

BiblioCommons was considered for their website builder and content manager, discovery layer, and calendar and event manager. BiblioWeb, its website builder and content management system, is optimized for public libraries and seamlessly integrates with the catalog and events module, BiblioEvents. This offering enables libraries to manage initial program scheduling, creation of content and resources, publicity, and attendance. BiblioCore, its discovery layer, also was built with a public library focus and integrates with every major ILS. Community-contributed content is shared across all BiblioCore libraries. When conducting searches, all formats of a title are listed together in the search results.

BiblioCommons also offers a handful of add-on products. BiblioCloudRecords automatically displays eContent holdings such as those from OverDrive and Hoopla in the catalog without the manual efforts of managing MARC records in the ILS. BiblioSuggest is a tool that allows patrons to create and staff to manage patron suggestions. BiblioFines allows patrons to pay fines and fees directly from BiblioCore using PayPal checkout. Lastly, its newest product still in development, BiblioEmail, supports a library's marketing initiatives through personalized email campaigns, tapping into content created in BiblioWeb.

Following the initial demos of these products, our committee was granted access to sandbox test websites, allowing hands-on testing for both BiblioCommons and Communico. Where BiblioCommons gave us two logins with introductory training on how to use the CMS as well as a document with links and ideas on what to try, Communico gave us one login and no training. Three staff members clicked around the CMS and tried adding/editing content. Their feedback can be found in Appendix C along with a comparison chart of the main points for BiblioCommons and Communico.

Appendix C - Comparisons between BiblioCommons and Communico

<u>The Basics</u>	BiblioCommons	Communico
Website	BiblioWeb	Create, Control
<i>Implementation Fee</i>	\$27,122.00	\$3,750.00
<i>Annual Fee</i>	\$40,000.00	\$15,000.00
<i>Included</i>	BiblioEvents Integrates fully with the BiblioCore catalog, and provides staff tools to manage all library events.	Connect (3 rd party connection engine), Broadcast (digital signage), Attend (events), Reserve (room/asset booking), Engage (multi-platform patron apps). After the above bundle is secured, additional modules are available. They can be mixed and matched to reach thresholds for package pricing, including: Check (patron self-check), Roam (mobile staff devices).
<i>Structure</i>	Pages, cards, drag and drop, edit on preview, able to utilize WordPress programming within site if necessary to achieve a desired effect.	Pages, widgets, drag and drop, edit on preview, not able to add custom web programming code.
<i>Blog Posts</i>	Extensive editor – media, form, book titles, booklists	Normal editor for HTML Widget, not really made to create blog posts
<i>Examples</i>	https://arapahoelibraries.org/ https://sppl.org/ https://www.tacomalibrary.org/	https://gppld.org/ https://alexlibraryva.org/ https://rhcl.org/ https://www.chicagoridgelibrary.org/
Discovery Layer	BiblioCore	Discover – Later in 2021
<i>Implementation Fee</i>	\$15,536.00	-
<i>Annual Fee</i>	\$12,500.00	-
<i>Integration with website</i>	Display events and booklists in results. Booklists provide a Netflix-style interface to quickly scan through resource offerings.	Plug-in modules utilize traditional techniques to highlight available resources, though it's more scroll intensive.
Additional Options	CloudRecords – reduces the effort associated with importing of e-media marc records into the catalog.	

<i>Permissions</i>	Tiered permissions for what staff members can publish or need review from a higher permission person	Multiple access settings and edit-specific widgets or pages
<i>Timeline</i>	6-8 months	3-4 months, depending how much revamp we're doing

Product Demos

Committee members attended virtual product demos geared specifically to CPL. We were also provided with recordings of these demos for later review and comparison. The BiblioCommons recording can be found in the [Discovery Layer - Website Committee folder](#) (Documents -> Committees -> Discovery Layer - Website Committee) on SharePoint. The [Communico demo](#) recording can also be found on SharePoint.

Sandbox Testing Feedback

BiblioWeb Sandbox Test Website Feedback:

- Overall experience was good, generally straightforward to use.
- Particularly liked the way the system automatically cropped images for the system (frustration with images in current website).
- No problems creating content, it seemed pretty intuitive.
- I could see this being really nice for getting things off the ground for 62 Days of Summer, Electrify Your Winter, and other campaigns.
- For events, I like how you can list a contact email or phone number. This would be useful for our ELL groups here, which don't require registration but do kind of require someone to reach out to us to get the Zoom link. This would be SO HANDY!
- I really like how Chicago has lots of lists and new releases available for browsing on their books pages. I would hope we could do something similar. We could probably "feature" some content and let what's regularly created be wherever it ends up.
- I like the visual style it creates and the ease with which page layout meshes with booklists and events, which are what librarians create. Our current system doesn't really favor the librarian experience side of things, and layout side isn't much. I couldn't see us getting this much functionality and integration between content creators and layout laborers with Drupal.
- Also, if CR can 'learn the language' of BiblioWeb or just work really well with IT collaboratively, or even if they give IT a concept/category of things, I could see how this would be more collaborative and dynamic in general.

Communico Sandbox Feedback (in comparison to BiblioCommons):

- Overall, not as straight forward to use.
- Not as easy to create/edit content how you want, less flexible.
- More of a simple text editor, less ability to manipulate things such as images you add.
- No real problems creating some content such as an event and form.
- Preview didn't always work well.
- Feels a lot more piece-meal than BiblioCommons; kind of like it has everything, but nothing 100%.

- Doesn't seem to work for catalog-browsers/power-users and librarians-doing-reference categories, as well (librarians will often utilize one another's lists when helping with patrons).
- Doesn't seem to have much of anything for booklist creation/librarian-generated content, which would change our workflows and offerings substantially. Like, what would we do for the summer program? It might still be possible to pull something together with librarian-curated resources, but I don't know how/if librarians would be entering it in themselves or if it would have to be shifted off as work to IT.
- In the sandbox there really isn't anywhere to make blog posts and the reference websites either didn't have blog posts or used a separate website like blogspot

Pros and Cons

BiblioWeb Advantages

- An easy, less technical user interface.
- Built around creating content that showcases resources and is reusable in various layouts; this means the content can be used in multiple sections of the site, which results in greater utilization of work (e.g. IS booklists and CR events are easy to feature).
- Provides mobile-responsive designs and phone-friendly, intuitive interfaces.
- With an easier, less technical user interface, it allows for cross-training of multiple staff members as well as more collaborative design decisions, enabling more staff to be content contributors.
- Integrates seamlessly with BiblioCore.
- Less training/time-intensive platform than Drupal, allowing a better shift of staff-time-resources between web presence, ILS management, and other duties.
- Day-to-day and project-based work for website content is based more on visual design and usability; it utilizes drag-and-drop features that are more inspiring and intuitive than Drupal's administration menu. This allows content to be created without knowledge of coding, so is more collaborative, creative, and timely (resulting in shorter development times on requested projects).
- The cost is a true subscription fee rather than a maintenance fee, meaning we are granted all upgrades at no additional charge.
- BiblioCommons does extensive user testing, both to prevent bugs from reaching customers and to ensure designs meet and exceed patron expectations.

BiblioCore Advantages

- Catalog built with the public library patron in mind, which is a significantly different user than the academic researcher.
- Unifies and integrates the catalog and website together, is mobile-friendly/responsive out of the box; there is no retrofitting.
- Integrates all formats of a work in search listings, which highlights the other formats, allowing users to see availability and check out items from OverDrive and Hoopla directly from the catalog; this is particularly important because we see year-over-year increases in electronic materials use and spending.
- ILS agnostic, which allows us to keep our presentation layer consistent should we decide to switch ILS vendors in the future, since interfaces have been built for most all of the major ILS products (but not all, such as Koha).

- Pricing is population-based; we're in the minimum pricing tier, meaning that we are able to pay the minimum for a product for which much larger libraries pay more.

BiblioEvents Advantages

- Included with BiblioWeb at no additional cost
- Allows events and programs to be featured in multiple ways on BiblioCommons products with seamless integration
- Same features as Drupal events (series, registration for a series or for an individual event, repeatability)
- Expectation is reduced data entry for Community Relations!

BiblioCommons Disadvantages

- Subscription-based, which will increase the cost of maintaining our web presence and catalog.
- As a cloud-based service, represents the potential need for increased Internet bandwidth.

Appendix D - Why BiblioCommons?

BiblioCommons will deliver a fully integrated online experience that will be live within a matter of months. They have well-established project timelines and processes for implementations that are flexible, but can also ensure that the library's new website, catalog, and events systems are all delivered on schedule.

BiblioCommons is a company of 75 people based in Toronto, Canada, which specializes in user-first designs for public libraries. Their main product, BiblioCore, is a discovery layer that is ILS-agnostic, offers the features for which we were looking for in a discovery layer (e-book integration, format/work roll-ups, faceted searching, e-commerce-like experience for interacting with materials, mobile-friendly, cover-image heavy browsing) at a price cheaper than Encore or Inspire. It is well-regarded by staff members who have interacted with the product and provides patrons with a modern user interface to their library.

Staff Feedback

BiblioWeb would replace Drupal, and BiblioEvents would replace Drupal's calendaring and Sierra Program Registration. BiblioEvents is included with BiblioWeb at no additional cost. One hope for any content management system that we choose for our website is that it results in greater efficiencies and autonomy, particularly for Community Relations, so changes and updates can be more timely and collaborative.

Adopting the BiblioCommons platform is strategically important. With the productivity enhancements for library staff via the BiblioWeb Curation Console and the BiblioEvents management system, library staff will have more time to focus on creating great content and engaging our community. BiblioCommons and BiblioWeb were made to work together, so they integrate seamlessly. In addition to our requirement that the website and catalog integrate well, another reason why we ought to consider BiblioWeb at the same time we look at BiblioCore is that BiblioCommons offers a discount for implementing all modules at once.

After attending demos on BiblioCommons's website and discovery-layer products and reviewing its reference websites, the committee thought the sites developed with their tools and templates had a modern design and an easier, less-technical user interface. This easy-to-use interface will allow for easier cross-training of multiple staff members as well as more collaborative design decisions. One committee member brought up how we spend a lot on library materials and our current setup isn't user friendly for patrons to really discover and use all that we have to offer. BiblioWeb and BiblioCore are built around creating content and then showcasing it in various layouts, which will help us highlight our materials and make our resources and materials more accessible.

The committee felt that the BiblioWeb page setups help to display content in a more appealing format so that patrons may actually be drawn into viewing the blog posts that IS and CR spend hours creating. Also, with an interface that makes it easier to create and share content, we can lessen some of the busy work in CR. Although the system will allow us to keep a blog post-focused website, the committee discussed how BiblioWeb also would work well for us if we decided to move away from blog posts.

After attending a CPL-specific demo on Communico's website product and reviewing their reference websites, the committee thought both its public-facing site and staff-side content manager site felt old, clunky, and not as aesthetically pleasing as other library websites built on the BiblioWeb platform.

Additionally, since their system isn't structured to be a blog post-focused website, as we use on our current site, the committee concluded the system does not align with our focus and feature needs.

As for waiting until Communico releases its discovery layer offering, there were concerns about it being brand new, and after our preview of its website offering, it had us questioning the quality, performance, support, and functionality of what would be a totally new product. Another concern was how slow the Communico sales representative was in getting information to us in a timely manner or responding to questions. This had us questioning how it would be to work with Communico as a company and whether it is understaffed or its resources are tied up in other places.

Although the Communico products have an appealing cost, the committee considered the cost of staff hours, resources, and possibly external design input that would be required to get a website up to the standard that's offered by other products. The cost in staff effort for maintaining a website that felt older and not as easy-to-use was also considered. With the many concerns that came up during the discussion of its products, the committee ruled Communico out as an option for both the CMS and discovery layer.

Having both the discovery layer and website through BiblioCommons offers seamless integration and consistent web experience, as well as the ability to have content cross over between them, such as including events in catalog search results. As questions came up through the committee discussions, the sales representative was very responsive and helpful. We also found that other libraries that currently use its products still find them responsive and helpful. These reviews and comments are listed further down in this Appendix.

Lastly, the cost was discussed in relation to what it offers in comparison to other products. The committee felt that although it had a higher cost, its products would save employee time and allow for a better shift of staff time and resources than our current system. It was also discussed that we want products that will be worth their cost of over time, which we believe BiblioCommons' products offer.

The Value of Patron Engagement

In February 2019, an independent consultant performed a study on how BiblioCommons impacts patron engagement. The data used in the study came from the Public Library Data Service (PLDS), was self-reported by libraries on an annual basis, included libraries in the United States and Canada, and spanned from 2011 to 2017. "The infographic and graph below show how different variables positively impacted circulation. Of all the variables that positively correlated with circulation, BiblioCore Usage had the strongest correlation by far."

With BiblioCommons Libraries Thrive

Libraries that subscribe to BiblioCommons services see higher library usage

Even after adjusting for population size, funding per capita, collection size, collection budget, hours, and staff, libraries that subscribe to BiblioCommons services see higher library usage than public libraries who don't use BiblioCommons*.

39% ↑

greater circulation per capita
with the BiblioCore catalog



Variables that Positively Correlate with Circulation



This graph illustrates how the variables of service hours, population density, material expense, CD/DVD expense and BiblioCore usage are all positively correlated with circulation. Of all the variables that positively correlated with circulation, BiblioCore Usage had the strongest correlation by far.

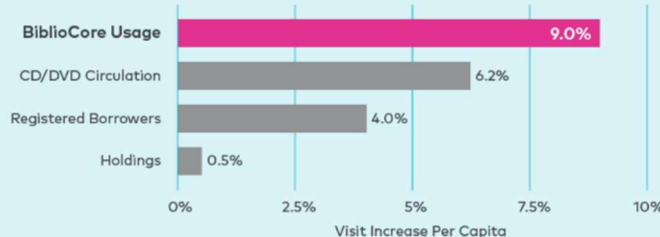
“The graph below shows how different variables positively impacted visits. Of all the variables that positively correlated with visits, BiblioCore Usage had the strongest correlation by a moderate margin.”



9% ↑

more visits per capita
with BiblioCore

Variables that Positively Correlate with Library Visits



This graph illustrates how the variables of holdings, registered borrowers, CD/DVD circulation and BiblioCore usage are all positively correlated with visits, both in person and virtual library visits. Of all the variables that positively correlated with visits, BiblioCore Usage had the strongest correlation.

“When holding the relevant variables constant, it’s reasonable to expect that a library using BiblioCore will have about 39% greater circulation per capita and 9% more visits per capita than a library not using BiblioCore. What’s most surprising is how BiblioCore usage was more closely associated with circulation and visits than variables like library income and population density.”

“For years, libraries have added layer upon layer of technology, systems and equipment, all designed to get patrons closer to collections, programs and services. And each layer is another system that has to be monitored and tweaked, or another server that has to be continuously upgraded and patched. I don't know how many times I thought ‘Boy, if I only had time to build this cool thing!’ But what if someone else was handling all that tweaking and patching and you could just focus on building what your patrons will love? That, to me, is the beauty of BiblioWeb+BiblioEvents+BiblioCore.”

BiblioCommons References

“San Mateo County Libraries had an award-winning Drupal site, but it was challenging to maintain with a small team. We switched to BiblioWeb, and our staff was thrilled. We have so much more flexibility and control over the design and content, and the complete integration with the catalog and events is so important for the user experience. The constant enhancements with BiblioWeb have really transformed our online experience. In the middle of the pandemic, we were able to completely redesign our homepage in a matter of days in order to focus exclusively on our online services and events. And we can flip it back to our ‘old’ homepage whenever we're ready. That would have been impossible with our old website.”
-Cris Miranda, Senior Graphics Specialist/Web Developer, **San Mateo County Libraries**.

“The question for other libraries isn't ‘Do we really need BiblioWeb to create what we have now?’ It should be ‘What have we always dreamed about doing, that BiblioWeb can make possible?’” -Lauren Douglass, Head of Technology Services, **East Lansing Public Library**. It uses BiblioWeb, BiblioCore, and BiblioEvents. “I love them, we love them, and can't recommend them enough. Their user community is very engaged and friendly. It would be awesome to have another smallish, one location library join BiblioCommons, especially a neighbor from Michigan!”

“The implementation process with BiblioCommons was very good. There was lots to do, but they have a great plan for getting you through all the steps. The training was excellent. We are a bit smaller than you and about 80% of our staff ended up attending at least one online training session. Since we were on a Drupal site (like you, right?) we didn't import anything. We just built the site from scratch. Our staff fell in love with BiblioCore's List content type. When they create content, it is most often Lists.”

“About two years after we went live with BiblioWeb, they introduced v2, and we were one of the first libraries to go live with that. Again, lots to do, but they were with us every step of the way, and their plans are spot on. And no, they don't switch up the whole structure of BiblioWeb on you every two years! We just happened to sign on when it was in development, but it wasn't ready for launch yet.”

“Their support is excellent. Far and away the best tech company we work with. The documentation on their support site is very good and they have frequent training webinars etc. Working with the site every day is very intuitive. We encourage all staff to create content, but they are so busy that often most content creation falls to me, as well as admin for the site, page refreshing, content curation, etc. I couldn't do all of that without BiblioCommons. When staff do create content, they like using this much better than our old Drupal site. And the tight integration between BiblioWeb and BiblioCore just can't be beat. The building tools on the back end are very easy to use and BiblioCommons provides lots of page templates if you don't want to make your own.”

“When we launched BiblioCore, we already had a discovery layer, Encore from ILL. We were worried about patrons having trouble when they switched over, but there was none - they just got it because it is easy to use. And BiblioEvents is very easy to use and works great.”

Pricing – “BiblioCommons ain't cheap, but so far our costs have held steady. They are very transparent about pricing and give you a heads up early if they think prices will go up. Again, ours haven't. Anticipated increases have always been fair, and lower than other companies that regularly charge an X percentage increase each year, like Innovative. Their pricing is based on population size, and we are one of the smallest stand-alone libraries on their platforms. BiblioCore is more affordable than BiblioWeb, but for us, it is much cheaper than hiring a web developer. We never have to worry about security patches, upgrades, hosting, WordPress issues, etc. They do it all.”

Skokie Public Library uses Communico for event registration, room booking, and to manage displays on digital screens in the building, but it uses BiblioCore as its discovery layer. “My main criticism of the software is that they tend to make adjustments to features and look/feel of their pages without much input from the customer. That said, I generally approve of the changes that they make and appreciate the iterative improvements over time. I’m also quite happy with their indexing. They harvest data on a regular basis (several times an hour) so the catalog is quite up to date with the data in the ILS. Their support has generally been quite good, too. I’ve never found myself waiting for an answer on a question that was urgent.”

Arapahoe Library uses BiblioCore and BiblioWeb with Sierra. “I’m a bit of a BiblioCommons super fan, honestly. They’ve been one of the most consistent vendors we’ve worked with over the last several years: They’re extremely responsive, have a great dev team that is easy to talk to and work with and are the best we’ve seen when it comes to in-depth user experience testing. Pricing is going to be a bit higher compared to other vendors, but I see it worth the cost for the resources and tools they are providing, as well as the overall user experience. We never see any unexpected costs, and any annual increases for any products that arise has been no greater than 3%.”

Tacoma Public Library uses BiblioCore and BiblioWeb with Sierra. “I personally really like the BiblioCommons product, and I have found their support to be very reliable. As far as library-specific software/web service go, I’d consider them to be among the best. If I’m honest, I don’t look too closely at their pricing. Having been their customer for a few years now (and the entire time I’ve been with the library), it’s more of a fixed cost that I expect to go up from year to year the same as a database or electronic resource.”

Saint Paul Public Library uses BiblioCore and BiblioWeb with Sierra. “Our experience with BiblioCommons has been great so far. I have always found their staff to be efficient and friendly, quickly resolving problems, answering questions, or pointing me in the right direction. Ever since moving to their service, we have had very little downtime -- I can't even recall the last time there was an unplanned site outage. The initial site set-up and training process was very easy -- we had a key person to contact who was able to guide us through everything they needed from us and configured the system correctly. Pricing is expensive, but the annual increases have been reasonably low -- our biggest "problem" has been a

growing population, since that is what pricing is based on. They have always given us plenty of notice about what the prices for the next year will be so it has been easy to budget.”

Grand Rapids Public Library uses BiblioCore for our discovery layer. “We've been up and running with BiblioCore for a bit over a year and are really happy with the product. Patrons and staff took to it really quickly and enjoy having more discovery and readers advisory options. We do still get some patrons who like our old catalog, but that's expected.”

“The implementation process takes about six months, but covers everything from contract review, technical setup, cataloging setup, format mapping, site testing, staff training, soft launch and final launch. Their migration team is very hands on and guided us through the entire process. I had weekly meetings with them throughout so by the time we launched everything was pretty much ready for public use.”

“BiblioCommons is an easy company to work with and responsive to service request and questions. They have a Partner Portal where we can submit service tickets. The ticketing system was utilized heavily during the setup process and we continue to use it to submit tickets when issues pop up. We haven't needed to submit very many after launch, just for things like adding a new format, increasing hold limits, etc. I don't think we've experienced any outages or service failures yet.”

“Pricing was pretty rigid. If I recall it was based on size of patron base. The only add-on that we purchased was the Spanish Language module, though our communications team is looking into the calendar and web options for future consideration. I asked about discounts for bundled features, but at least at the time, they didn't budge from the set prices for the a la carte options. No hidden extra fees though and I don't think the price increased much at all on our second year renewal.”

Appendix E - Example BiblioCommons Sites

- Arapahoe Libraries
 - <https://arapahoelibraries.org/>
 - Has BiblioCore, BiblioWeb, and BiblioEvents
- Boston Public Library
 - <https://www.bpl.org/>
 - Has BiblioCore, BiblioWeb, and BiblioEvents
- Calgary Public Library
 - <https://calgarylibrary.ca/>
 - Has BiblioCore, BiblioWeb, and BiblioEvents
- East Lansing Public Library
 - <https://www.elpl.org>
 - Has BiblioCore, BiblioWeb, and BiblioEvents
- Skokie Public Library
 - <https://skokieliibrary.info/>
 - Has BiblioCore only, with Communico (an alternate to BiblioWeb)
- Multnomah County Library
 - <https://multcolib.org>
 - Has BiblioCore only, with a Drupal website
- Princeton Library
 - <https://princetonlibrary.org/>
 - Has BiblioCore only, with a Drupal website
- Chicago Public Library
 - <https://www.chipublib.org/>
 - Has BiblioCore, BiblioWeb, and BiblioEvents

2019

The Future of Drupal

Why 2019 Might be the Year for Public Libraries to Re-Consider Drupal (if They Haven't Already)

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For years, Drupal was a go-to open source content management system (CMS) for public libraries, alongside nonprofits, government and corporate sites of all sizes. Many libraries started on Drupal 6 and have migrated to version 7, while others chose Drupal more recently. There is no definitive tracking for library websites, but based on our knowledge, we'd estimate that at least a quarter of public library websites are currently (or have recently been built) on Drupal.

And yet, the migration to Drupal 8 has proved slow, as many organizations — public libraries included — are beginning to reconsider whether it's still the right choice for them. Initially released in 2015, Drupal 8 represents a fundamental shift from previous versions in terms of technical architecture, and this radical shift could be what's preventing many organizations from adopting the latest version.

It's time to re-evaluate and ensure that Drupal remains the right solution

Drupal founder Dries Buytaert [announced](#) at DrupalEurope 2018 that come November 2021, Drupal 7 will no longer be supported by core maintainers with fixes, security releases, or enhancements. Now, all organizations currently either on Drupal or considering it as an option are being forced to decide: do we migrate to Drupal 8 — or take this crossroads as an opportunity to reconsider altogether?

In this paper, we will focus exclusively on (and quote extensively from) the opinions of other long-time Drupal builders and contributors, including agencies, freelancers, and in-house developers, and share their recent questions and concerns, such as:

- The challenges and costs of migrating from Drupal 7 to 8
- The new complexities of Drupal 8
- Many of the longstanding challenges of Drupal 7 that have yet to be acknowledged
- The shift in Drupal's priorities
- Whether or not trends are in favour of Drupal
- Available alternatives

We realize that every library will face different circumstances and priorities. However, as the importance of the digital experience in organizations' overall sustainability and strategy grows, it's critical public library leadership is aware of what's happening across the technology landscape. The purpose of this paper is to empower public library stakeholders beyond the front-end development team to meaningfully engage in the discussion, and make better, more informed decisions.

Why have so few organizations upgraded to Drupal 8?

Drupal upgrades have always been challenging — Paul Vetch, Strategy Director at Torchbox, one of the largest design build agencies for nonprofits in the UK, calls them “epic,” and some developers even liken upgrades to “starting from scratch.” According to Vetch, Drupal’s six-month release cycle between minor versions has already led to potential data loss and security issues, like upgrade path bugs and access bypass vulnerability.

Migration is a significant undertaking

Unlike most other CMSs, Drupal has not historically guaranteed backwards compatibility from one version to another. Themes, modules, and plug-ins may become incompatible with new versions — as has happened with Drupal 8 — leaving organizations dependent on module contributors to release updates. Many never do.

1. Themes will have to be completely rewritten

In Drupal 8, PHPTemplate was replaced by Twig as the template engine of choice — the biggest overhaul of Drupal theming in a decade. While Twig makes the Drupal theme layer faster and more secure, it’s now impossible to run PHP scripts, make database calls or access the file system. This means that, in most implementations, themes will have to be completely rewritten after migration.

“In addition to the revamped architecture, new required build processes, and upgrade difficulties, almost every Drupal site has to completely rewrite its theme.”

— Jeff Geerling, Author and Software developer

“In many cases, this is the straw that breaks the camel’s back,” writes author and software developer [Jeff Geerling](#). “In addition to the revamped architecture, new required build processes, and upgrade difficulties, almost every Drupal site has to completely rewrite its theme. And for many of the sites I’ve built and worked on, this is probably where the majority of the effort would need to happen.”

2. Transferring content isn't a simple process

Because of custom modules, developers may need to shift data-structure paradigms and workflows, adding significantly to development time and costs. “You have to meticulously frame your business strategies to make content migration worth your while,” writes Shankar Iyer of [Opensense Labs](#). “It is important that developers and editors consolidate their work to simplify the migration.” Both parties will have to minimize changes to the information architecture and navigation structure of public-facing sites.

3. No automatic upgrade path for Views (and other core modules)

Put simply, the Views module is a user interface to compose SQL-queries, pulling information (whether it's content or users, etc.) from the database and displaying it to the user in the desired format. However, even years after release, the Views module doesn't have an automatic upgrade path in Drupal's core. This means you will need to manually recreate its views on your Drupal 8 site, despite the module being the third-most installed module for Drupal, after Core.

“You have to meticulously frame your business strategies to make content migration worth your while.”

— Shankar Iyer, Opensense Labs

4. Most custom modules will have to be rewritten

Drupal 8 is object-oriented, where Drupal 7 was primarily procedural. Instead of relying on hook-oriented paradigm and procedural programming as it had in the past, Drupal chose to apply object-oriented methodologies and a new framework called Symfony. This decision affected almost all Drupal's main components — from core functionality to its template engine. This also means that a lot of code will now be in classes rather than simple functions. The end result? Most custom modules will have to be rewritten in the Symfony environment — a huge challenge. Everyone considering Drupal should understand that while Drupal's upgrade path will reliably preserve your data, there is no backward compatibility with previous Drupal code. Since there's no backward compatibility in modules, every single custom module has to be rebuilt.

5. Many contributed modules lack a complete upgrade path

According to developers, porting code to Drupal 8 is a big deal. There are so many changes that many are even tempted to rewrite code from scratch. This is exacerbated by poor

documentation for a lot of Drupal 8 — most of which is much, much worse for contributed modules. Developers often resort to reading source code in order to figure out how things are supposed to work because there is no documentation and no examples.

Moreover, upgrade paths are still experimental and some contributed modules might not have a complete path. If contributed modules provide a path, data stored by a previous version will be migrated to Drupal 8; however, if a Drupal 8 port is not available, then functionality has to be built or the module has to be ported.

Owing to the challenges above, the migration of themes, modules and plugins to Drupal 8 has been particularly slow. Much to the disappointment of Drupal's community, even three years after its initial release, Drupal 8 still does not offer a wide range of plugins. Instead, developers are forced to write custom modules from scratch to implement functionality that was more easily deployed in earlier versions.

Drupal's value proposition for smaller organizations has changed

Drupal has been a go-to CMS of large enterprises for a long time, thanks to its scalability and flexibility. As the Enterprise Content Management (ECM) market is set to grow to US\$94.6 billion by 2024, Drupal has stated that it will be positioning itself to own a segment of that market, leaning on its powerful information architecture, multilingual capabilities, and more to secure it.

“Drupal was once an 800-pound, open-source CMS gorilla that has since become an 800-pound monkey on our back... squishing our productivity and squeezing our bottom line — and Drupal 8 hasn't made things better.”

—Paul Vetch, Strategy Director, Torchbox

This marks a major departure from Drupal's roots. Back in 2011, Drupal was the “safe” choice for smaller organizations and nonprofits. “No one ever got fired for choosing Drupal” says Paul Vetch. However, according to Vetch, once an “800-pound, open-source CMS gorilla,” Drupal has since become an “800-pound monkey on our back, squishing our productivity and squeezing our bottom line — and Drupal 8 hasn't made things better.”

It's clear—Drupal's headed upmarket

Many used to believe Drupal was a fantastic option for nonprofit organizations with unique needs and limited budgets — BiblioCommons even used Drupal as the backbone of BiblioWeb back in 2010 (we've since made the switch to WordPress and haven't looked back.) With the introduction of Drupal 8, that trend has shifted. In 2016, at DrupalCon New Orleans, Drupal's founder and project lead Dries Buytaert explained that “we're more about big sites and less about small sites”. Elsewhere he's been quoted as saying: “I see us as being the next large open source business model to reach \$1 billion in revenue, like Red Hat. We're on the IPO track — even though it's still early days, but we are getting ready.”

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we are getting ready.”***

—Dries Buytaert, Founder & Project Lead, Drupal

So Drupal's headed upmarket — a move precipitated by its commercial ecosystem.

“You used to be able to find lots of freelancers and small shops who were interested in working with smaller organizations on smaller projects,” writes long-time Drupal developer and community member David Snopek. “However, many of the freelancers I know have gone on to work at big shops and many of the small shops have grown or merged with others. And they are looking for big projects.” And this doesn't just affect Drupal 8 — it's now harder for smaller organizations with limited budgets to find help with Drupal 7, and much harder for any small nonprofit who was successful with Drupal 6 to move to Drupal 8.

Bottom line: Drupal is increasingly moving to the enterprise space, making its value proposition increasingly questionable for nonprofit organizations.

Drupal 8's major rewrite — new, shiny, and unproven

The upcoming Drupal 8 release represents a significant rewrite of the software and a major change in the architecture with a move to the Symfony framework. In the words of Petr Palas, Founder & CEO of Kentico Software: “All that proven Drupal 7 code is heading towards the waste-bin.” The Drupal community throws away all of that existing tested and proven code and replaces it with new, shiny, unproven code.

Palas goes on to say:

“As we all know, all too well, no amount of testing can replace the crucible of real-world use. Inevitably, customers struggle with issues of stability, security, and performance as well as user experience in the early months.”

And it doesn't stop there. Another downside of a major change is that implementation best practices change when the architecture does. As a result, many experienced Drupal 7 developers need to relearn key concepts, and experiment and learn from experience to determine best practices.

“All that proven Drupal 7 code is heading towards the waste-bin.”

—Petr Palas, Founder & CEO, Kentico Software

Object-oriented programming presents a steep learning curve

In introducing Drupal 8, Buytaert conceded that it comes with a steep learning curve:

“The advantages and disadvantages of object-oriented programming are well-understood. The disadvantages are size, verbosity, the amount of work it takes to write (including the design planning that goes into it) and slower performance. For people new to object-oriented programming there may be a steep learning curve; some of the key programming techniques, such as inheritance and polymorphism, can be challenging initially.”

He claims that sacrificing ease of use is necessary in order to create code that will prove “more maintainable, more modular, and more accessible to non-Drupal developers.” And yet, this means many smaller Drupal agencies are shifting gears and dropping Drupal altogether.

Why are smaller agencies dropping Drupal?

Many developers maintain that Drupal is altogether too slow to develop with, too hard to use and maintain, and therefore too expensive for nonprofits that need maximum

functionality, at minimum cost. On the Torchbox website, Vetch breaks down specific reasons why they as an agency have abandoned Drupal:

“The module ecosystem is a mixed blessing.”

“While they can introduce efficiencies, all too often contributed modules won’t fully address the intended use case, and instead add to the maintenance overhead. Compared with Drupal 7, there are 50% fewer modules actively maintained for Drupal 8. That’s a significant difference.”

“It’s opinionated about markup.”

“Even with the improvements that Twig has brought to the table,” writes Vetch, “you still need to be a specialist Drupal frontend to be an effective themer. Just like in 2011.”

“An even steeper developer learning curve”

According to Vetch, Drupal 8 has a steep learning curve with its adoption of Symfony. Moreover, it requires special care with long-term support and maintenance.

“The UI is still complicated”

Despite a significant push to improve usability in Drupal 8, the platform still requires agencies to train users to do basic content management tasks, or expend large amounts of effort customizing the interface to make it user-friendly.

In short, Drupal 8 brings with it added complexity, without removing any of the complexity that existed in previous versions.

Example minor or patch update:

Update

1. git pull origin master
2. vagrant up
3. drush sql-sync @mysite.prod @mysite.local
4. composer require drupal/core:^8.6.6 --update
5. add customizations back to core files
6. review changes
7. drush cache:rebuild
8. drush update:db -y
9. drush cache:rebuild
10. drush config:export -y
11. git add -A "Updating to Drupal core 8.6.6."
12. git tag 1.0.1
13. git push origin master --tags
14. backup database

Deploy

15. drush @mysite.prod cset system.maintenance_mode 1
16. deploy new 1.0.1 tag
17. drush @mysite.prod cache:rebuild
18. drush @mysite.prod update:db -y
19. drush @mysite.prod cache:rebuild
20. drush @mysite.prod config:import -y
21. drush cset system.maintenance_mode 0
22. drush @mysite.prod cache:rebuild

Many steps

Requires developer expertise

Can be required multiple times a month!

Code

Database

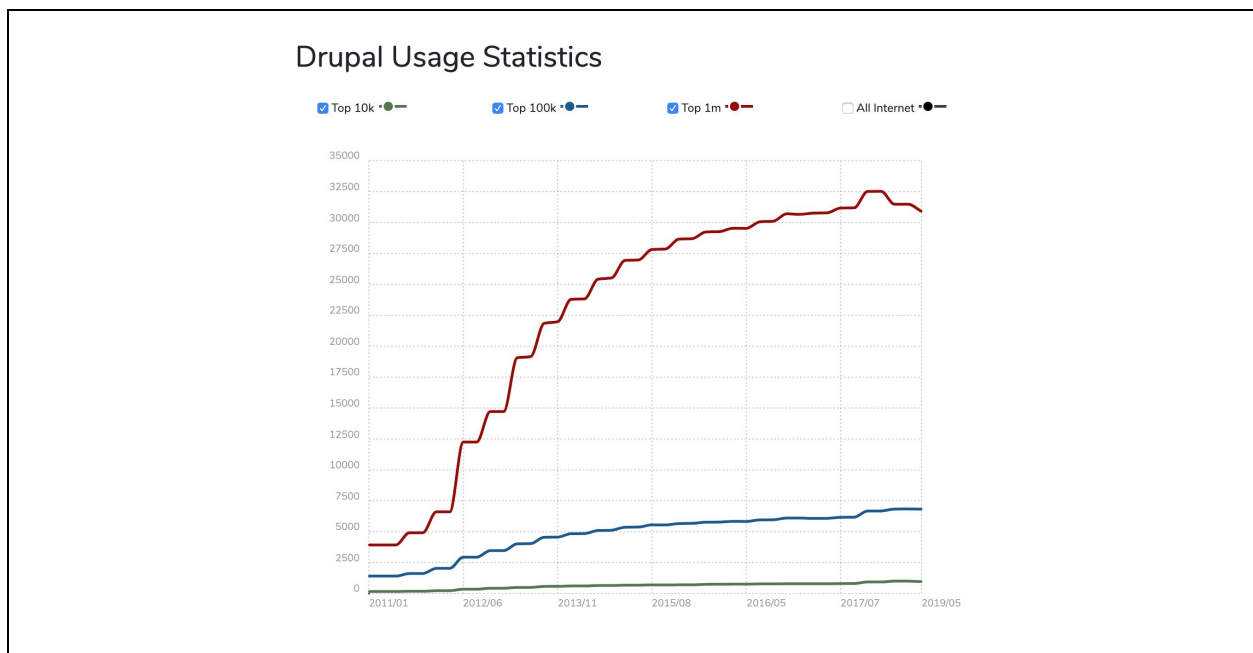
Config

Drupal 8's non-existent auto updates means maintenance is increasingly complex.

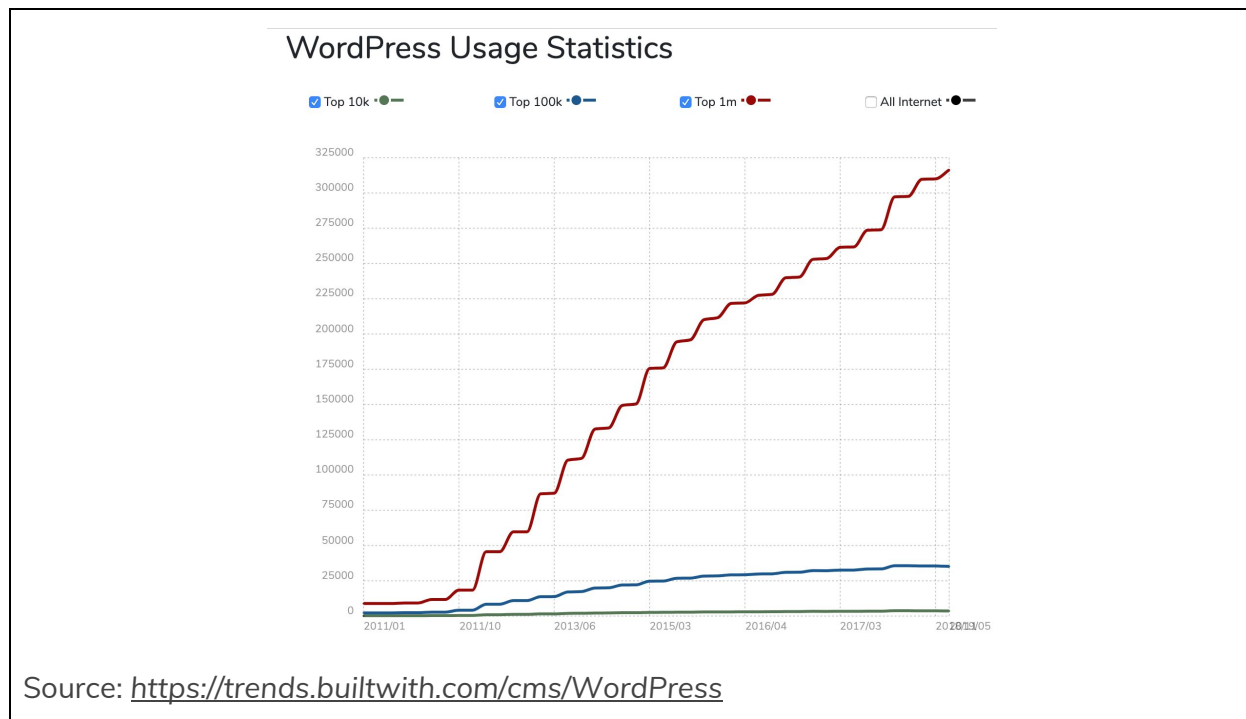
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Overall trends are not on Drupal's side

On the surface, Drupal trends appear static, or in a slight decline. The truth is, Drupal is declining in usage by almost any metric. Since Drupal 8 was released in late 2015, Drupal's overall use has stalled at around 1.2 million websites. DrupalCon, Drupal's hallmark international event centered on the use of the platform, attendance peaked in 2014, and has been declining since. Drupal Core downloads have steadily decreased since 2015, and Google search trends reveal that Drupal has hit its lowest ranking since November 2005.



In contrast, WordPress trends have been steadily positive.



Get a list of [1,917,404](#) websites using Drupal which includes location information, hosting data, contact details, [614,752](#) currently live websites and an additional 1,169,290 domains that redirect to sites in this list. 1,302,652 sites that used this technology previously and [14,939](#) websites in Canada currently using Drupal.

Site Totals

Total Live	614,752
1,169,290 additional website redirects [?]	
Canadian Live Sites	14,939
Live and Historical	1,917,404
Top 1m	3.17% 31,677
Top 100k	6.96% 6,964
Top 10k	10.05% 1,005

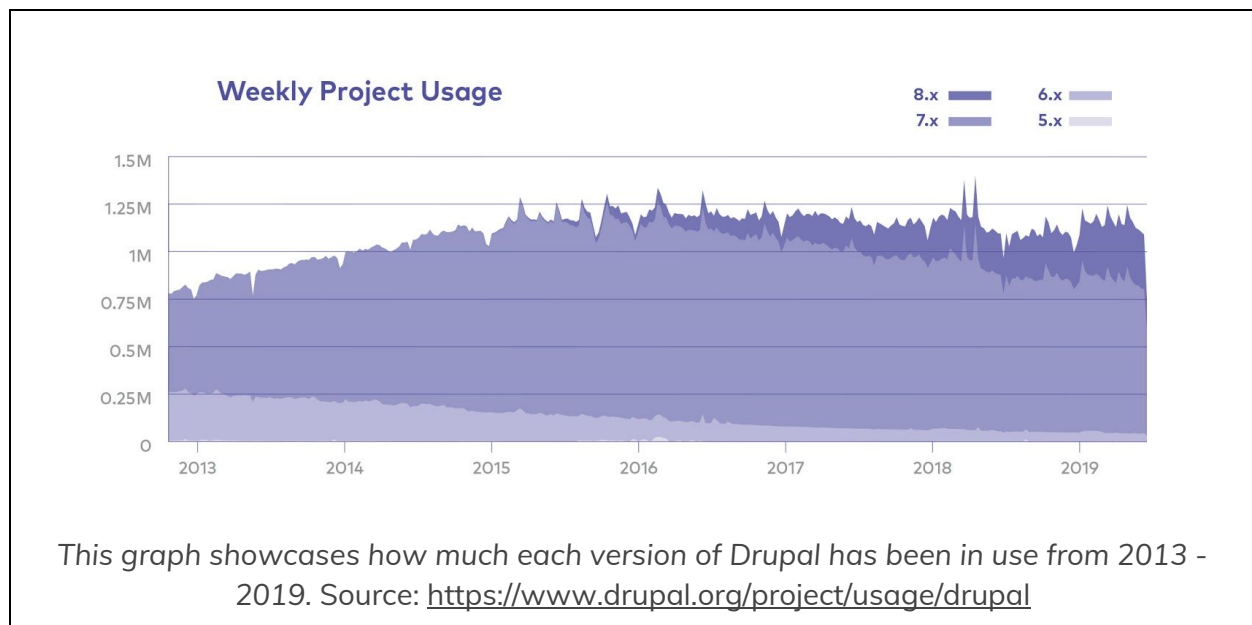
We know of at least [24,808,989](#) live websites using WordPress.

Site Totals

Total Live	24,808,989
2,353,161 additional website redirects [?]	
Canadian Live Sites	166,646 Estimated
Top 1m	32.83% 328,299
Top 100k	35.98% 35,981
Top 10k	37.75% 3,775

<https://trends.builtwith.com/cms/Shopify>

What's most telling is that over 77% of websites on Drupal haven't yet migrated to version 8. In fact, Drupal 8 adoption has still not hit a level of growth which will put it ahead of Drupal 7 any time soon — despite being released in 2015.



There's growing concern about Drupal's ecosystem

It's no surprise then that there is a growing concern about the health and sustainability of the overall Drupal ecosystem, a concern that is reflected in poor documentation. Since the Drupal developer community is much smaller than that of other CMSs like WordPress, fewer people are contributing to shared knowledge, which means fewer solutions to uncommon problems and slow updates to base documentation.

“[Drupal 8 documentation] is a mess of unfinished pages without a clear structure.”

—Dogerthat, Reddit User

One Reddit user complained “[Drupal 8 documentation] is a mess of unfinished pages without a clear structure” and another agreed: “Drupal 8 documentation is rough. I can't seem to find clear directions to accomplish something.”

So, what's next for libraries?

There are also significant changes in the technology landscape surrounding Drupal, as a rising number of former Drupal agencies have started to adopt other technologies to address the needs of smaller organizations like libraries that don't need to scale at the level of enterprise companies. These moves are driven by two primary needs:

- **Site building tools.** Libraries require powerful site building tools that are nonetheless simple to learn, and don't require dozens of contributed modules to be installed and configured in order to keep implementation costs down. They'd also prefer to avoid writing a lot of custom code because of limited budgets.
- **Easier updates and maintenance.** Libraries would benefit tremendously from auto-updates because maintaining and updating their Drupal 8 sites can be too manual, too complex and too expensive. Site updates have often become more complex for libraries because of their dependency on third-party libraries and having to juggle ad-hoc updates from contributed modules.

There are hundreds of solutions to choose from. However, they all have their own strengths and weaknesses. Choosing a web platform depends on the use case. Here are a few alternatives that have proved popular among organizations seeking Drupal alternatives:

Static Site Generators

Open source web development technology is not limited to the CMS. A new breed of website creation tool (like [Jekyll](#) and [Middleman](#)) is gaining popularity as easy-to-use solutions for quickly creating responsive websites. Typically, content is created and stored in text files and compiled into a static site for the server. They usually don't come with a user-friendly admin interface, raising the technical bar. But for developers, they offer significant value compared with a traditional CMS, as they are often easier to develop on, which translates into less of an expense to maintain.

Backdrop CMS

Some developers didn't like the changes introduced with Drupal 8. So much so that two well-known people in the Drupal community — Jen and Nate Lampton — "forked" Drupal, gave it a new website, a new contributors' platform, and then took the platform in a completely different direction, which was perceived as a threat by many Drupalists. [Backdrop](#) will be familiar to people with Drupal experience because it is so similar to Drupal, but includes numerous differences in usability and features.

Wagtail

[Wagtail](#) is an open source CMS written in Python and built on the Django framework. Built by developers for developers, it offers a fast interface for editors where content can be

created and structured intuitively. Kevin Howbrook, a former Drupal developer, claims that the 'Drupal site builder' role will become more and more obsolete as it becomes best practice to create functionality in code versus using hundreds of modules. That's why he foresees Drupal being supplanted by CMSs like Wagtail in certain cases. He writes: "Why not switch to something that's not only already doing that, but has been doing it for a long time?"

Headless CMSs

Drupal and WordPress are both traditionally "monolithic" CMSs, with presentation baked in via the theme. That means your website must be built "on top" of the CMS; to implement them, you will need to learn and (re)build your website based on CMS rules and processes. Due to the need for more flexibility and freedom, however, many developers have begun decoupling the CMS, using it for content management, editorial, and administrative tools, while implementing a separate frontend component dedicated to the user experience which communicates with the CMS via a web API. This allows organizations to add CMS functionality where they need it in their existing tech stack. This way, the CMS is integrated rather than foundational.

Wordpress

With approximately 60% of websites (like TechCrunch, Walt Disney, even The New Yorker) using WordPress as their CMS, WordPress boasts a massive community. With a larger community comes more people contributing to documentation, feedback, and ideas, making development on WordPress much more rapid. Additionally, the WordPress ecosystem is huge. From its community to its range of plug-ins, WordPress offers customization at significantly less effort than other platforms. And unlike some other solutions, WordPress supports automatic updates, meaning far fewer upgrade- and migration-induced headaches.

Do-it-yourself

In order for a built in-house solution to serve you well, it must be feature rich, flexible, extensible and powerful, as well as integrate with other services. And, of course, you'll need to select solid open source tech with good APIs and useful documentation. But that doesn't mean connecting them is going to be fast or easy. Libraries spend a significant amount of time and expense integrating all the parts and pieces and supporting them with a ton of custom code. Everything will work at the launch of the project, but the investment required to maintain it will grow all too quickly.

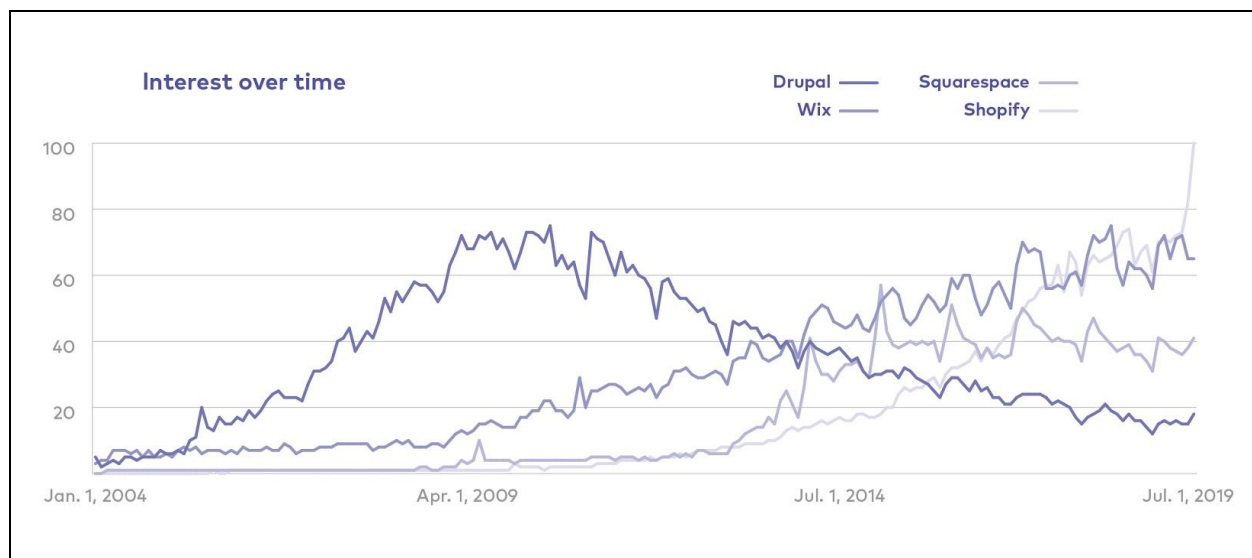
Software as a Service

SaaS, or Software as a Service, solutions are becoming increasingly more common among libraries due to the many benefits for both software providers and customers. SaaS solutions are, simply put, significantly easier to administer, update, support and expand, and offer extensive flexibility and continued support. SaaS companies are dedicated to evolving

and improving their product over the long term, which customers then benefit from, typically at no extra cost.

SaaS — the rising tide that lifts all boats

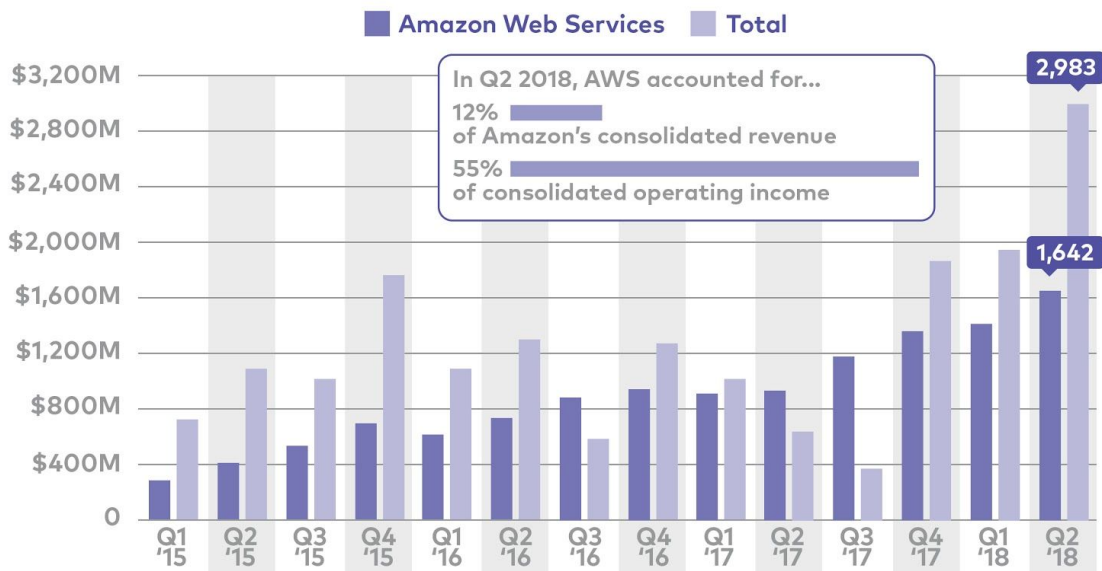
SaaS is a model in which the software is licensed and the solution is accessed through the internet. Customers do not install or download any local software; instead, the vendor is responsible for the security, uptime and updates. Over the last 10 years, the SaaS market has grown dramatically, far outpacing that of CMSs like Drupal: it is anticipated to grow at a compound annual growth rate of 21.2% over the next four years, and currently generates roughly \$20 billion in quarterly revenue.



The cloud market, which makes SaaS possible, is expected to grow by 17.3% in 2019. Even Amazon, which is known to most as an e-commerce business, looks to its B2B cloud SaaS service Amazon Web Services (AWS) for 55% of its operating revenue.

Cloud Business Drives Amazon's Profits

Amazon's quarterly operating profit (in million U.S. dollars)



Source: <https://omoto.io/academy/saas-in-2018/>

The reason SaaS providers have seen so much success is that the great ones have invested time and resources into deeply understanding their market, and perfecting their product and the service they deliver. This is particularly true for vertical SaaS companies.

What is vertical SaaS?

Finding a SaaS partner that perfectly suits your needs has become even easier thanks to the rise of vertical SaaS. Vertical SaaS solutions are those that are optimized for a particular industry's needs and workflows. Vertical SaaS providers are cropping up across all industries, most notably healthcare, construction, finance, and cannabis, as these are massive industries that have very particular needs that many horizontal or industry-agnostic SaaS providers aren't able to fully understand or serve.

The Washington Post's Arc Publishing platform is a great example of a vertical SaaS solution that was built specifically to address the needs of digital publishers, and has been utilized by the *New Zealand Herald*, the *Boston Globe*, and the *Chicago Tribune*. Veeva Systems provides cloud-based CRM and content management to the life sciences industry.

BiblioCommons, for example delivers vertical SaaS solutions across web, catalog, events and more to public libraries, whose complexity is often underestimated.

Why is vertical SaaS perfect for libraries?

Public libraries don't compete with each other. Instead, they're vying for their respective communities' time, attention, and loyalty in an era of television streaming, social media, podcasts, and other sources for inexpensive or free content. For this reason, public libraries are well suited to adopting a vertical SaaS solution, given that neighbouring county libraries can use the same service, without fear of competition. In this case, a rising tide lifts all boats: by partnering with large, metropolitan libraries that have the funds to invest in our SaaS product, (like the Chicago Public Library, Boston Public Library, and King County Library System) BiblioCommons has been able to innovate and develop stronger products, which in turn benefits smaller libraries with limited budgets. Of course, the general trend of moving to the cloud brings with it other opportunities and benefits, some of which we explore below.

Continuous product improvements

The high costs of custom code force most libraries to make punctuated software improvements once a year or every few years, depending on the library's size. Popular SaaS platforms, on the other hand, deliver frequent updates to stay current with the needs of their customers. Libraries looking for a schedule of continuous improvement should look to SaaS — Salesforce, for example, undergoes scheduled maintenance twice per month.

Better integrations with other solutions

When it comes to integrating with other solutions, custom software has a slight advantage over SaaS — but it comes at significant expense. You can have custom code built to integrate with any third-party solution that your library uses. Realistically, though, few libraries will find that custom software integrates better than SaaS options. Today's landscape is dominated by application programming interfaces (API) that let them work in coordination with other products. If a developer indicates that a software's API can work with your other software, then integration should occur pretty easily.

Opportunities for social coding and sharing

For libraries, a social context runs to their core. Indeed, it's part of the process of discovery and engagement with their collections and fundamental to their mission. SaaS software offers libraries the opportunity to partake in a public digital space where communities of librarians, readers and learners help each other discover and explore the ideas, information and stories that are the public library's collections and services.

Faster speed of implementation

Building custom software can take months or years of work depending on the size of the library. After finalizing software, you still need to install it and train your staff how to use it correctly. You could easily wait a year or longer before you implement custom software. On the other hand, SaaS software offers a much faster option. Since the software has already been built, you don't have to wait for a team to build it. Even if the software needs a few tweaks to fit your business's needs, you can expect to start using it within weeks or months.

Sharing reduces cost

Even if going the DIY or self-managed route sounds like the best option for your library, the high price of retaining a software engineer could make you change your mind. You can choose to hire a software development company to do the work, but you shouldn't expect the price to fall by a considerable amount. SaaS companies charge less for their services because they distribute costs across their customers. Instead of spending hundreds of thousands of dollars all at once, you may only spend a few thousand each month.

Public libraries' limited budgets make custom integrations not only time consuming, but also financially risky. Often the scope and price of a custom project increases dramatically once it's already underway, leaving libraries vulnerable to either blowing their budget, or ending up with an incomplete product. By contrast, the number one job of a vertical SaaS product is to know which integrations are necessary for that industry from the get-go, and to complete them efficiently to deliver an out of the box experience — with no surprises.

Is now the time to adopt a cost-effective, library-focused solution?

Every library has a unique spirit that reflects the staff and the community they serve. However, the primary function of a public library remains more or less the same across the board: to provide access to knowledge, information, and services to support their community. It would be an unnecessary waste of limited resources for each library to build its website from scratch or self-manage a platform when SaaS providers can support customized websites that reflect each library's unique brand, voice, collections and services.

BiblioWeb has evolved over eight years to allow each library to represent their unique flavor through their content, voice, and branding. We take care of the underlying platform security, integrations, and operations, enabling any public library, regardless of size or staffing, to serve its purpose with excellence. As organizations consider alternatives to Drupal to manage their websites, BiblioCommons hopes that more public libraries will consider BiblioWeb as a cost-effective, library-focused solution to supporting and enhancing the library's online customer experience. //

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Architectural Testing, Inc.
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Phone: (248) 957-9911

March 12, 2021

Mr. Daniel Stine
President
Sustainable Energy Engineering
1509 Genesee Dr.
Royal Oak, MI 48073

**RE: Visual and Moisture Roof Pre-Design Survey
Canton Public Library
1200 S. Canton Center Rd.
Canton, MI 48188**

Dear Mr. Stine:

In accordance with our current contract, Intertek has completed the pre-design survey of the older ballasted EPDM roofing sections at the Canton Library Building located at 1200 S. Canton Center Road, in Canton, Michigan.

Pre-Design Survey Summary

On March 5th, 2021 a pre-design field visit of the older ballasted EPDM roofs was performed at the Canton Library. The entire library building roof totals approximately 55,000 square feet. The original building was approximately 35,000 square feet and in 2001 there were some building additions that totaled about 21,500 square feet. The older “original building” roof system was replaced around 2008 and this survey was to focus on the nearly 20 year old sections of roofing from the 2001 building addition.

The 2001 addition portions of the library roof are ballasted EPDM single ply roof membranes. There is basically a west addition, a south addition and an east addition. The west addition is approximately 7,000 square feet, the south addition is approximately 3,650 square feet (two roof sections, 3,000 sf and 650 sf) and the east additional section is the largest at approximately 10,700 square feet.

The ballasted EPDM roof systems have markings that show them as 60 mil Carlisle membrane systems. Cores taken during the March 5th visit found the three largest areas where there was a single layer of 3.0 inches of rigid isocyanurate foam board and the remaining small area on the south of the building to have two layers of 1.5 inches of rigid foam. In a further search of Google Earth, it indicates that the smaller 16'x40' south addition roof section on the south side was yet a second building addition that was added between 2001 and 2004, thus explaining the minor difference in insulation materials in the system.

Based on the cores and the observations, all of these building addition roofs have a 1.5” deep steel ribbed roof deck and there appears to be positive slope for drainage built into the structural deck framing (approximately 1/8” to 1/4” per foot. Most areas drain to interior roof sumps, but the small roof area of the second building addition drains to a perimeter scupper.



The chart below shows the roof areas, deck type, insulation and membrane system for simplified review. The assemblies listed are based on the roof cores that were made.

Roof Area	Roof Core Location #*	Approx. Size (SF)	Deck Type	Insulation	Roof System
West Area (Section 1)	6, 7, 10, 11 and 12	7,000	Steel Deck	One layer 3.0" ISO loose laid	Ballasted 60 Mil non-reinforced EPDM
South Larger Area (Section 2)	2, 3, 4, 5, 13 and 14	3,000	Steel Deck	One layer 3.0" ISO loose laid	Ballasted 60 Mil non-reinforced EPDM
South Smaller Area (Section 2)	1	650	Steel Deck	Two layers 1.5" ISO	Ballasted 60 Mil non-reinforced EPDM
East Area (Section 3)	8, 9, 15, 16, 17 and 18	10,700	Steel Deck	One layer 3.0" ISO loose laid	Ballasted 60 Mil non-reinforced EPDM
		21,350			

(*Cores #1 through #9 were taken during the visual survey, Cores #10 through #18 were taken during the IR)

As a supplement to the visual roof survey, an infrared roof moisture survey was performed to identify if there is good indications that the existing roof insulation is in a dry enough condition to be salvaged and potentially recovered as part of the long term roof renovation design. The infrared survey was completed on the evening of Tuesday, March 9th, 2021. While ballasted roof systems are sometimes a challenge to scan with IR equipment, the effort generally will find large areas of significant moisture accumulation but may not find small areas or just damp insulation.

The results of the infrared moisture survey scan found no apparent significant areas of heat loss that would suggest wet insulation below the ballasted roof sections. Some areas of heat loss were noted along the roof edges suggesting some air gaps that may allow heat to flow where the insulation and wood nailers meet. A number of probes were taken during the infrared survey to verify that the insulation was dry to the touch at those locations. All of the probed locations were found dry to the touch. While we were on site scanning the ballasted sections, we scanned the 2008 roof areas which have a white thermoplastic roof membrane system in place. The results of the infrared moisture scan on those white roof membrane areas found no apparent significant areas of heat loss that would suggest wet/saturated insulation in those areas. No probes were taken in the 2008 roof areas as those are understood to still be under a Johns Manville manufacturer's warranty.

Some occasional roof leaks have been reported at in the older ballasted EPDM roof areas. During our interviews we were informed that past repairs have been done to find and patch leaks as they were identified. During the field survey we found three small membrane tears near the roof edge what would obviously allow water to enter the roof system. To assist the Owner, we applied temporary patches to those areas. With the single layer of insulation and with steel roof deck, it is very common that even when there are holes or seam failures that allow water to get past the EPDM membrane, that the water can then travel and drain through the insulation layers and down into the steel deck and into the building without having significant moisture trapped or retained in the insulation material.

The slope on these ballasted EPDM roof sections was measured to be approximately 1/8" to 1/4 inches per foot. The slope is generally a 4 way slope to the interior drains. No significant amounts of ponding water were noted during the visual survey which would indicate that drainage is sufficient.



The existing metal edging is the original copper metal. The copper metal is in fair condition and could be left in place and new metal could be installed over the existing. In looking at what was done with the 2008 roofing, it appears that the original copper was left in place and a new snap on metal was installed. These ballasted roofs could have similar installations so as to nearly match the appearance of the 2008 roof edge and provide some continuity of appearance.

These ballasted EPDM roof sections have a normal amount of rooftop equipment, including both small curbs as well as large HVAC units. There are some platform screen walls with sloped metal panels around the larger rooftop units. Based on the observed conditions there does not appear to be any significant costs related to installing new flashings to either the small or the large curbed units. The platform screen wall metal panel roofs could remain.

At the perimeters, the existing roof system is nearly flush with the existing perimeter metal. This will require that additional wood blocking to be installed at the perimeters so as to meet or exceed the elevation of any recovery roof insulation that is installed. Where the ballasted roof abuts the white 2008 roofing there are raised roof section dividers, which for the most part can remain. The sheet metal on those dividers will either need to be removed and reset or replaced during the planned roof renovation.

While much of the ballasted roof has normal light foot traffic to maintain the roof, there are localized areas where heavier foot traffic occurs. In those heavier trafficked areas, the Owner should consider installing walkpads, or can choose to install a more durable insulation recovery board and thicker membrane so as to make those areas even more durable and resistant to foot traffic.

In discussions with the facility, they did not believe that the reroofing work would require the building to be shut down. There are drop ceilings in place over much of the building and typically reroofing in such conditions would not require the building to be closed. We also don't believe that electrical conduit or other wires are routed in deck flutes (which may be penetrated by new roof system fasteners). If this condition does exist, it would be isolated.

Based on the age and condition of these older ballasted EPDM roofs, it is our opinion that they should be either recovered or replaced. Continued attempts for cost effective long term repair do not appear possible.

A preliminary roof plan for the facility is provided and appended to this report. That plan shows the building areas planned for rehabilitation.



Recommendations and Preliminary Design

In summary, the existing ballasted EPDM roof system is at the end of its useful service life. While the existing ballasted roof system could be “patched” and could perhaps provide limited service for 1-3 more years, it would be our experience that repair of this older roof system will not be viable long term and that leaks are likely to become more common and more of a problem over the next few years (even with repairs).

Based on the existing observations and conditions, it would be our recommendation that the older ballasted roof system be removed down to the surface of the existing rigid insulation. The existing insulation would then be repaired on an “as needed” basis and a new recovery roof system with new cover board insulation be installed. With the new insulation, it will be necessary to install new wood blocking to select curbs as well as the perimeter roof edges to meet or exceed the elevation of the new roof insulation.

The anticipated construction time to complete this work would range between 3 and 6 weeks depending on the size of the crew and other factors that are not knowable at this time.

The existing river washed rock ballast on the building could be salvaged and perhaps utilized as landscape rock somewhere in the City of Canton. Approximately 20 tons of stone ballast could be salvaged is that is something that the City/Township would like to have happen. The rock could be placed in a pile somewhere on the property for later relocation by the City/Township. Generally stockpiling the old ballast in this way is no additional cost to the project and can sometimes be a small savings depending on trucking and disposal costs for these rock materials.

The following summaries the scope of work for the new roof system:

1. Complete removal of the existing river washed rock. The rock can be stockpiled on site, or can be disposed of off site.
2. Complete removal of the existing 60 mil EPDM membrane and flashings.
3. The work can include the removal of the edge metal, or the existing edge metal can be substantially left in place. Leaving the old metal in place may save a nominal amount of initial costs (approximately \$500 to \$2,500).
4. Inspect and replace on a unit price basis any “wet or damaged” insulation. Based on the IR scan, we would perhaps expect 2-5% of insulation replacement as being necessary (mostly due to damage from roof traffic).
5. Inspect and replace any deteriorated or damaged wood nailer.
6. Install new wood blocking to meet or exceed the new recovery insulation thickness.
7. Apply low rise foam or other means to better seal the transition from the decking to perimeters, curbs, and transitions to limit any direct air paths into the new roofing system.
8. Install new recovery insulation, mechanically attached through the salvaged insulation to the steel roof deck. With the existing insulation providing an approximate R-value of 15, you can choose to install either a thin “minimum thickness” cover board to support the new membrane, or you can choose to install a thicker insulation board for the purpose of adding R-value. The records from the 2008 project indicate that a 1.5” board was installed, which would add an R of approximately 8. The addition of a 1.5” board would also match nicely with adding a single new 2x blocking at the perimeter edges and it would provide for the same system R-value as is on the 2008 roof. Please know that the current



recommendations are for buildings to have R-25 as a minimum. Because you would be recovering the roof, you are NOT required to meet the R-25 minimum assembly. To meet R-25 you would need to install a minimum 2" thick recover board. And a 2.5" recover board would provide for R-30. The new cover board should have the joints offset from the existing single layer in order to meet good roofing practice.

9. Install new white thermoplastic roof membrane sheet, fully adhered to closely match the system installed in 2008. The sheet could be a nominal 60 mil membrane or can be "enhanced" to an 80 mil thickness for even greater durability. This system will provide an estimated 20+ year life expectancy.
10. The existing roof drains would be cleaned and salvaged for re-use.
11. New metal edging would be installed and new edge membrane flashings would be installed.
12. New walkways would be installed to allow for planned roof maintenance foot traffic.

Budget

Based on the work described above, the following are preliminary estimated construction budgets:

1. Roof Recovery with 1.5" insulation and 60 mil fully adhered thermoplastic roof system	\$215,000 to \$270,000
2. Added costs for thicker 2.5" insulation	\$ 25,000 to \$ 35,000
3. Added costs for 80 mil system (if entire roof)	\$ 20,000 to \$ 25,000
4. Contingency costs (~10%)	<u>\$ 20,000 to \$ 35,000</u>
TOTAL BUDGET FOR PROJECT	\$280,000 to \$365,000

Budget assumes roof replacement is performed as one large project in 2021.

The standard available warranties for a fully adhered thermoplastic membrane system would be 20 years. Longer duration warranties may be available with the thicker 80 mil membrane system.

While a fully adhered white thermoplastic membrane would be our recommended recovery system, please know there are two other options. The first is a mechanically attached membrane, using the same thermoplastic sheet but rather than gluing it down it is secured with fasteners. The life expectancy for this system is estimated at 15 to 20 years and may represent a savings of around \$25,000. The second option is installing a ballasted system, essentially similar to the one you have now (we don't recommend this unless budget is an issue). That work scope would be the lowest anticipated initial cost and with that roof system selection you could salvage the existing stone ballast and use the old EPDM as a protection sheet. That lowest cost roof system scope would be to temporarily relocate the stone, strip the EPDM, repair wet insulation, install a low cost cover board, install a new 60 mil EPDM membrane (loose laid) and install the salvaged ballast over a protection sheet. This low cost system would still have new metal. The approximate savings for a 60 mil ballasted EPDM system as compared to the recommended fully adhered 60 mil thermoplastic system would be approximately \$50,000. A ballasted 60 mil EPDM system will be able to offer a minimum 15 year system warranty and some manufacturer's may be willing to offer 20 year warranties for this system. We would expect this system to last 15 to 20 years, similar to your existing roof.

Please know that no sampling or testing for asbestos was performed as part of this survey and pre-design work. We didn't identify any materials that would normally be associated with containing asbestos. We don't expect to uncover any products that may contain asbestos on this project.



Intertek can begin to prepare a Bid Document upon your direction to proceed and upon a selection of the desired scope of work.

Sincerely,

INTERTEK

Christopher B. Cogan, CDT
Department Manager
Building Science Solutions

Paul M. Majkowski, P.E., RRC
Principal Roof Consultant

Enclosures:

- Appendix A – Photographs
- Appendix B – Thermograms
- Appendix C – Roof Plan Sketch



1. General view of East Area roof, looking south. Aggregate surfaced EPDM.



2. Another view of East Area roof, looking north. The sloped mechanical unit screen wall roof visible on left.



3. Holes found in the NW corner of the east area. The wood blocking at the edge visible through the holes.



4. Intertek installed repair patches over these holes.



5. View of a typical core in the main roof areas. A single layer of 3" thick rigid isocyanurate foam found over a steel roof deck.



6. View of the roof core from the smaller south building addition where two layers of 1.5" foam exist.

Photographs 1-6



7. View of the smaller south building addition, looking northwest.



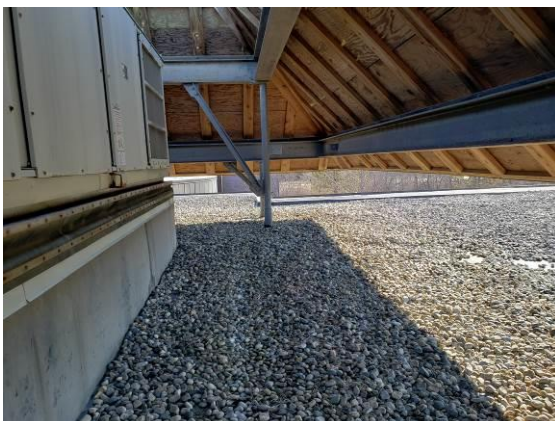
8. View of smaller south building addition, looking southwest. This roof drains to a scupper at the south wall.



9. View of the typical raised perimeter metal edge.



10. View of a typical raised roof edge. The wood blocking is approximately 13 inches wide and supports the EPDM roof.



11. View of the inside/underside of one mechanical screen wall area.



12. Another view of large rooftop penetrations and some limited spacing between the units.

Photographs 7-12



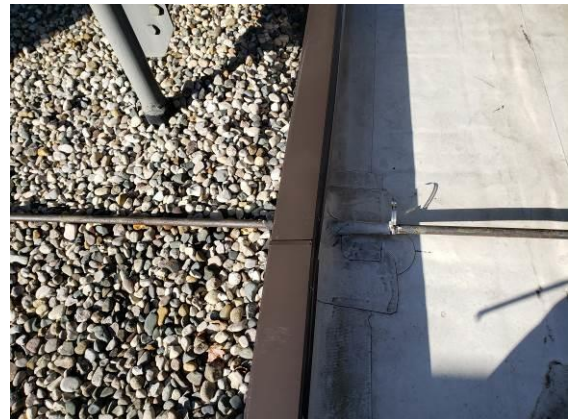
13. View of equipment sleeper supports. Reroofing should be possible without having to lift the large units.



14. An existing pyramid skylight. This skylight should also be able to be reroofed without having to lift and reset the skylight and frame.



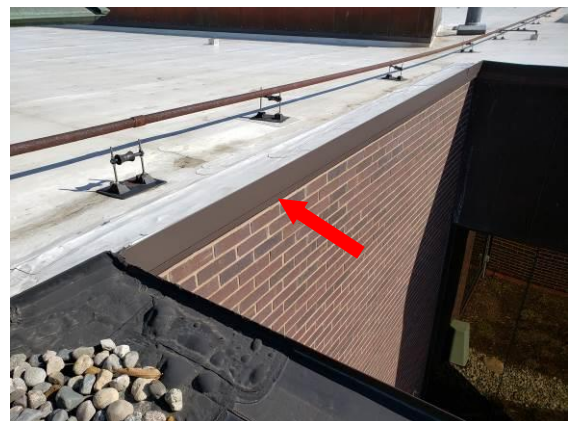
15. Most gas and/or electrical conduit is high enough to remain. Some areas may have to be lifted, depending on the thickness of the recovery insulation.



16. View of one location where the conduit goes through an area divider to the 2008 roof system.



17. Another view of the existing conduit and conduit supports on the ballasted roof. With the replacement roof, newer style supports could be added that may be better systems than simple wood blocking supports.



18. View of how roller supports were installed during the 2008 work and a view of the metal edge assembly on the 2008 work. It may be desired to match the look of the metal.

Photographs 12-18



19. Typical existing 4" roof drain on the larger roof sections.



20. Typical Portals Plus cap, which may be able to be salvaged and re-used during roof renovation.



21. Localized HVAC unit on wood sleepers. Should be able to be raised a few inches to sit on newer sleepers and pads with the new roof system.



22. View of a typical roof edge.

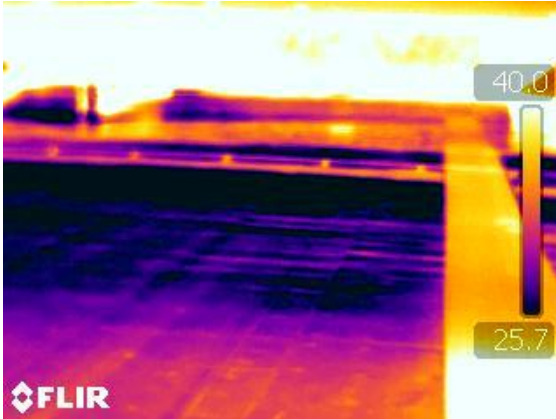


23. Close up measurement of the existing metal. Existing metal is slightly out from brick and is approximately 5 inches in face dimension.



24. Typical existing walk pads. With replacement roof new safety yellow walk pads could be installed, similar to those installed in 2008.

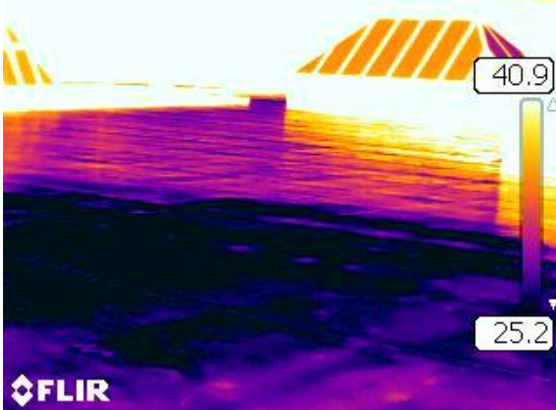
Photographs 19-24



1. Image 1. Walkway visible (as would be normal) in one of the 2008 smooth surface areas. No localized heat images that would be suspect of representing wet insulation.



2. Image 2. Another view of the 2008 smooth roof. Walkway visible (as would be normal). Curbs and pipes also visible (as normal). No localized heat images that would be suspect of being wet insulation.



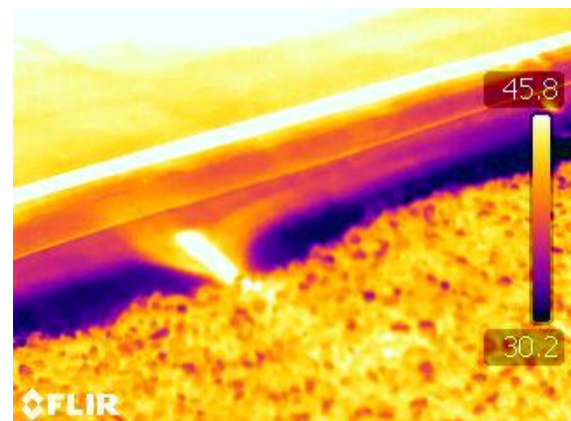
3. Image 3. A 3rd look at a smooth 2008 area roof. No localized heat images that would be suspect of representing wet insulation.



4. Image 4. A 4th look at a smooth 2008 area roof. No localized heat images that would be suspect of representing wet insulation.

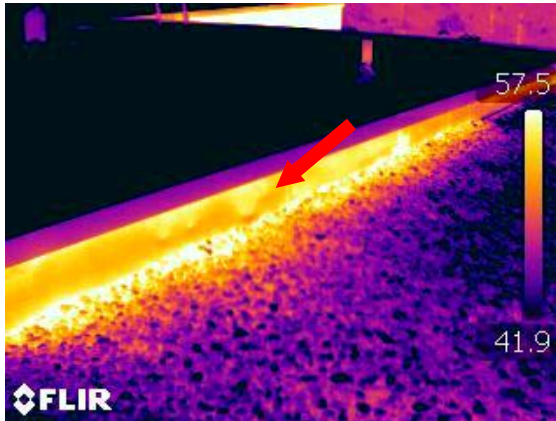


5. Image 5. One more smooth roof. No localized heat images that would be suspect of representing wet insulation. Conduits visible.

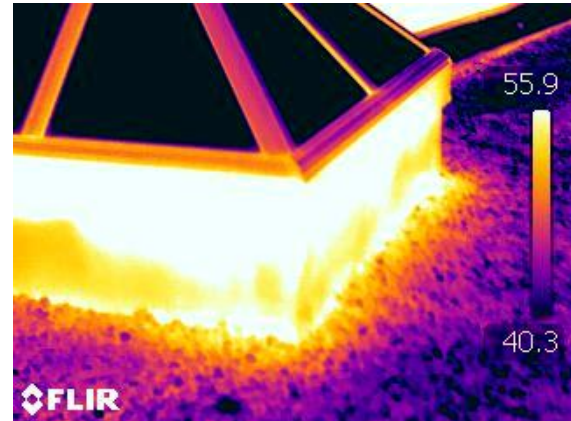


6. Image 6. View of a "ballasted roof edge". See the heat from the rocks. Gap between insulation board and/or nailer allowing heat loss.

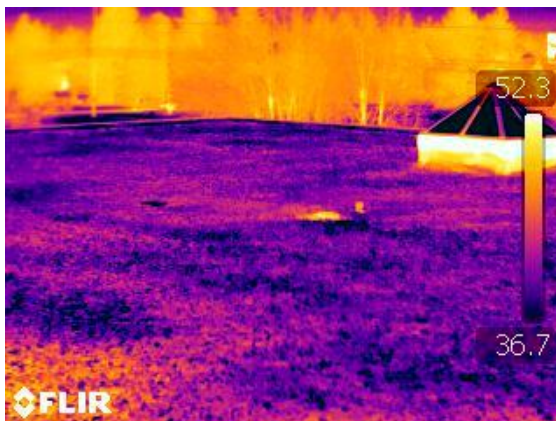
Photographs 1-6



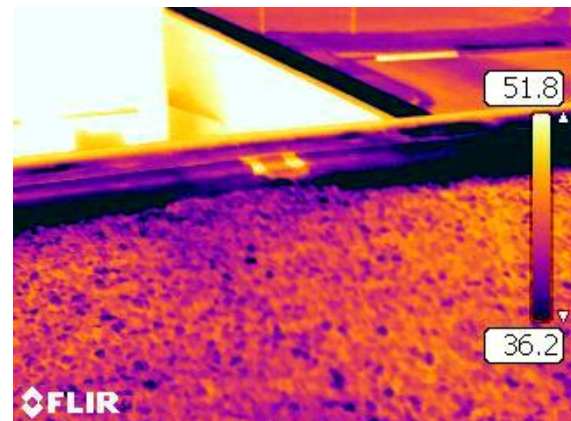
7. Image 7. Heat loss at the raised area divider curb. This is not believed to be due to wet insulation, but perhaps air leakage from the insulation to the wood curb.



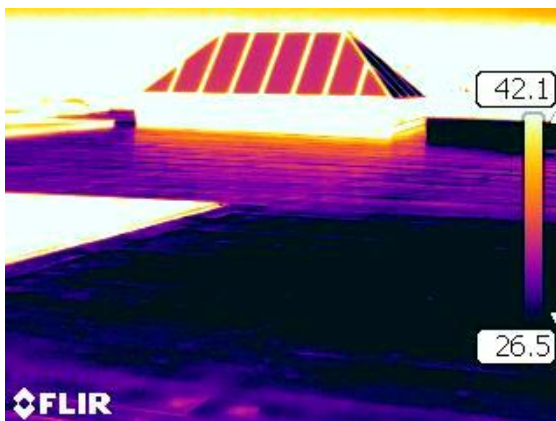
8. Image 8. Heat loss at the curb of the skylight. No obvious heat images in the ballasted system.



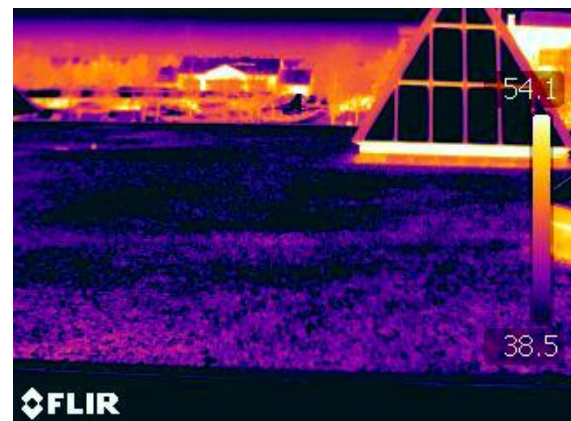
9. Image 9. General view of the ballasted roof with no localized heat images representing "wet insulation". The roof drain is visible as the bright spot in center of roof.



10. Image 10. Another example of some localized heat loss at joints in the perimeter wood nailers. This is on a ballasted roof section.

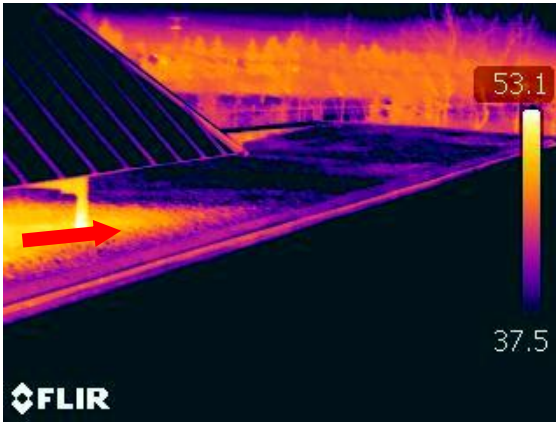


11. Image 11. No heat loss in the field of the white roof suggest wet insulation. (The white roofs have a smooth appearance while the ballast has a mottled appearance).

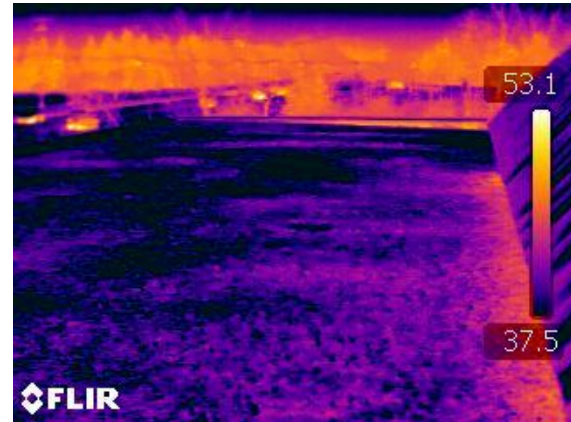


12. Image 12. Another view of a large section of ballasted EPDM with no observed heat loss areas.

Photographs 7-12



13. Image 13. The rock ballast is "warmer" under the screen wall, which is normal as the heat is held in place by the overhang condition and the heat from the unit.



14. Image 14. No observed heat images that would indicate wet insulation in this ballasted section.



15. Photo of Test Cut #10. Insulation found dry to touch.



16. Photo of Test Cut #11. Insulation found dry to touch.



17. Photo of Test Cut #12. Insulation found dry to touch.



18. Photo of Test Cut #13. Insulation found dry to touch.

Photographs 12-18



19. Photo of Test Cut #14. Insulation found dry to touch.



20. Photo of Test Cut #15. Insulation found dry to touch.



21. Photo of Test Cut #16. Insulation found dry to touch.



22. Photo of Test Cut #17. Insulation found dry to touch.

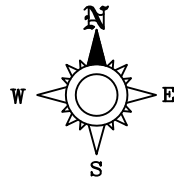


23. Photo of Test Cut #18. Insulation found dry to touch.

Intentionally Blank.

24. Intentionally Blank

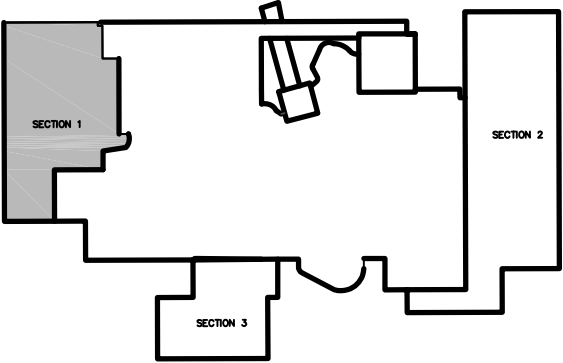
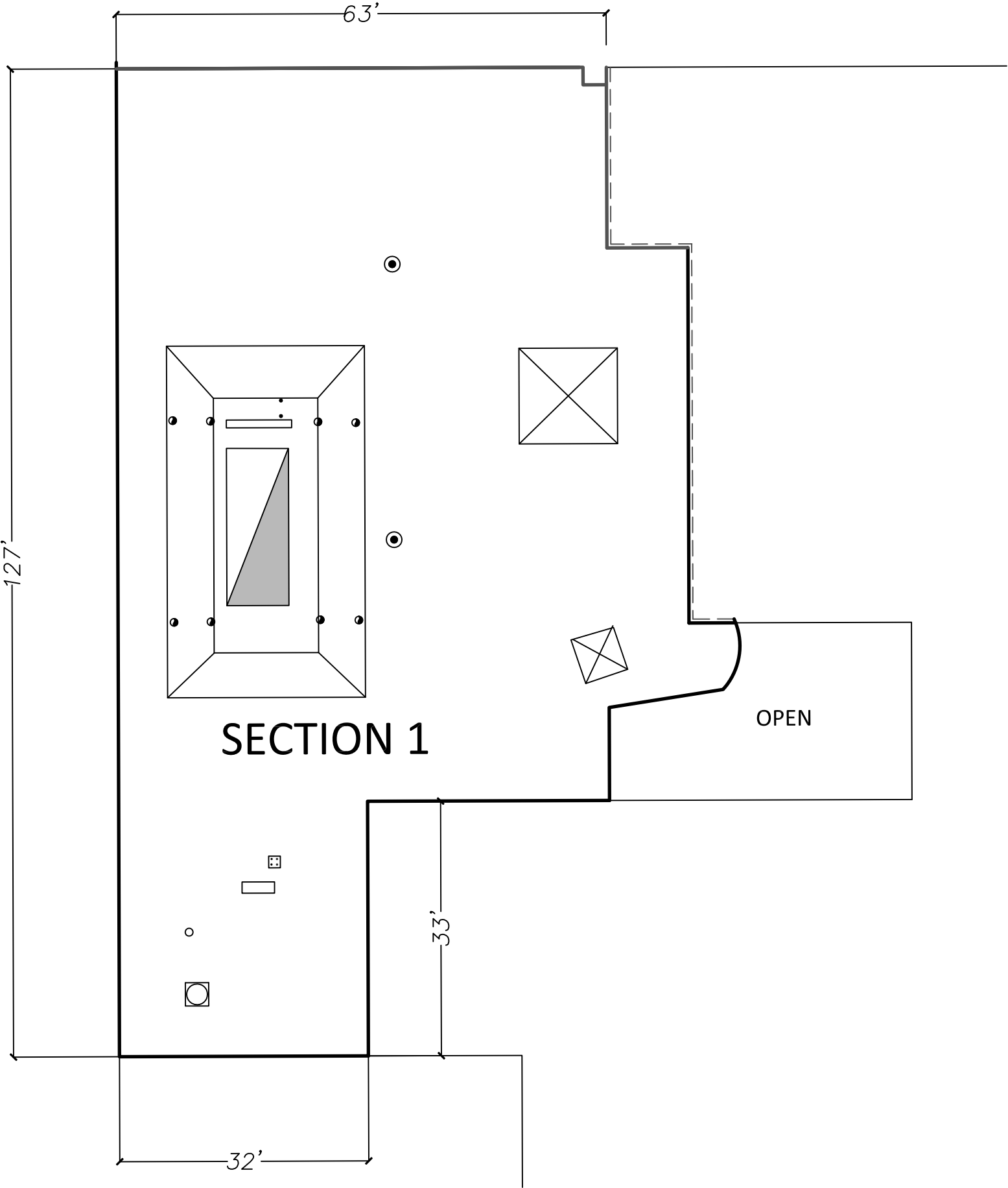
Photographs 19-24



ROOF AREAS	
SECTION	SQ. FT.
1	7,660
2	10,871
3	4,248
TOTAL	22,779

SYMBOL LEGEND

○	PLUMBING VENT (SOIL STACK)
∅	HOODED VENT
▣	AIR CONDITIONER
■	PITCH PANS
●	PIPE PENETRATION
---	DIVIDER WALL
⊕	CORE LOCATION
—	GAS LINE
□	EXHAUST FAN
⊙	ROOF DRAIN
◐	SUPPORT PIPE



KEY PLAN

01
RP-1

SECTION 1 ROOF PLAN

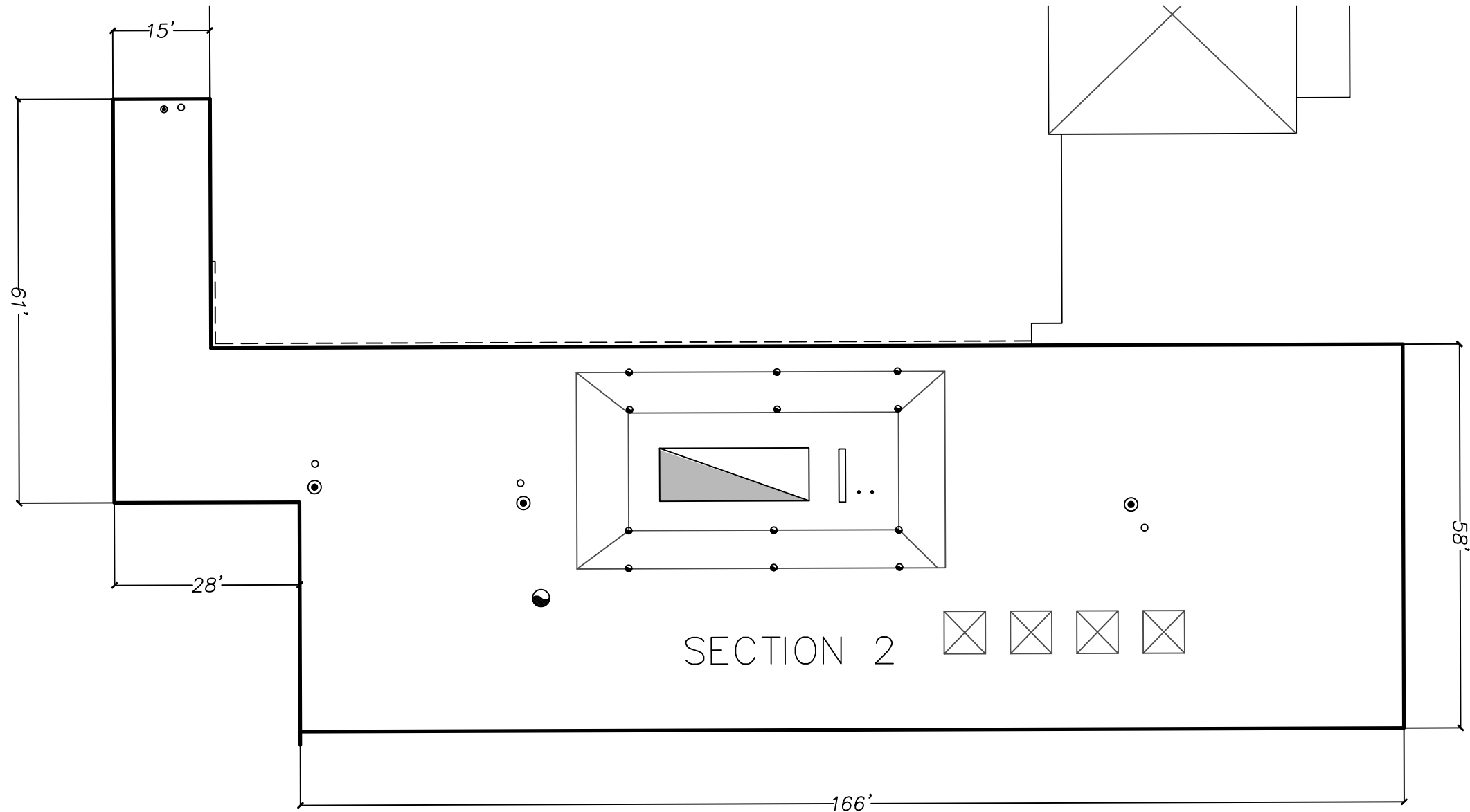
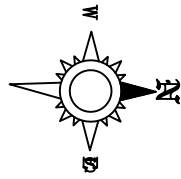
SCALE: 1/16"=1'-0"



Building Science Solutions
Building and Construction

37483 Interchange Drive · Farmington Hills · Michigan · 48335 · Tel 248.957.9911

PROJECT NAME:	CANTON PUBLIC LIBRARY	DRAWN BY:	DRS	DATE:	2/28/2021	DRAWING NO.:	RP 1
TITLE:	SECTION 1 ROOF PLAN	PROJECT MGR.:	C.COGAN	PROJECT NO.:	M0308		



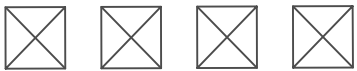
SYMBOL LEGEND

●	ROOF DRAIN
○	PLUMBING VENT (SOIL STACK)
—	ROOF EDGE
⌈	LADDER
≡	EXPANSION/ CONTROL JOINT
RTU	ROOFTOP UNIT
⊕	STACK PROJECTION
⊗	EXHAUST FAN

ROOF AREAS

SECTION	SQ. FT.
1	7,660
2	10,871
3	4,248
TOTAL	22,779

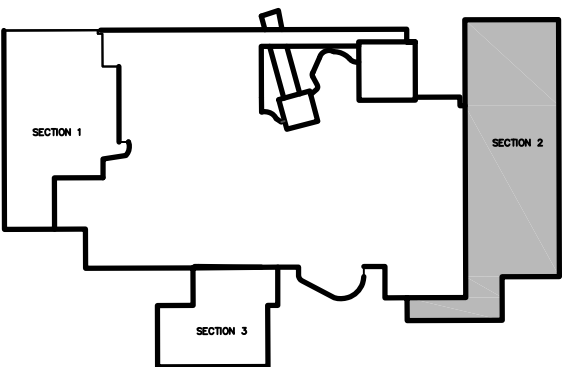
SECTION 2



01
RP-2

SECTION 2 ROOF PLAN

SCALE: 1" = 20'



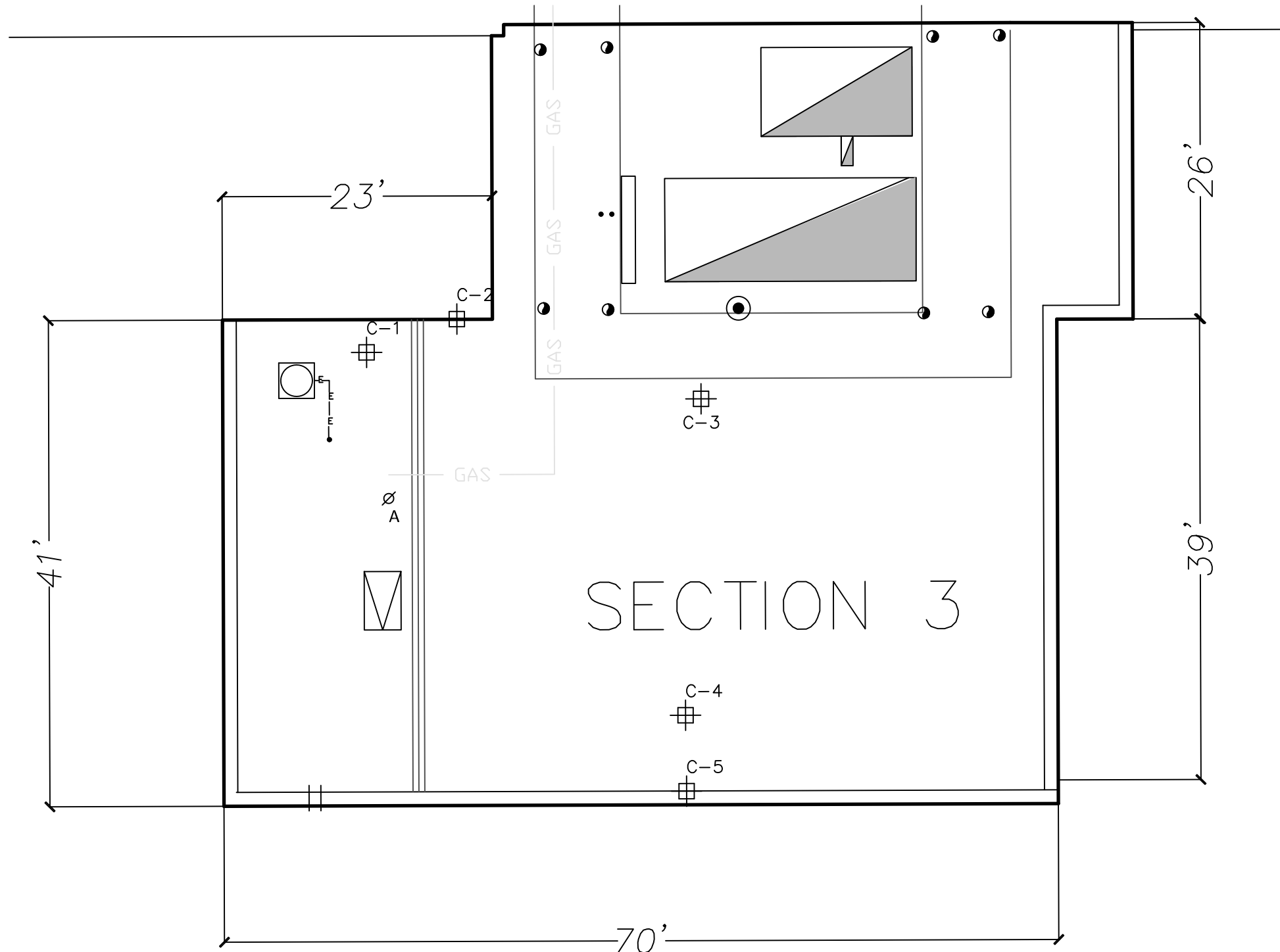
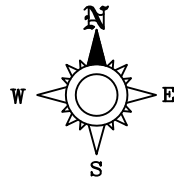
KEY PLAN



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PROJECT NAME:	CANTON PUBLIC LIBRARY	DRAWN BY:	DRS	DATE:	2/28/2021	DRAWING NO.:	RP 2
TITLE:	SECTION 2 ROOF PLAN	PROJECT MGR.:	C.COGAN	PROJECT NO.:	M0308		

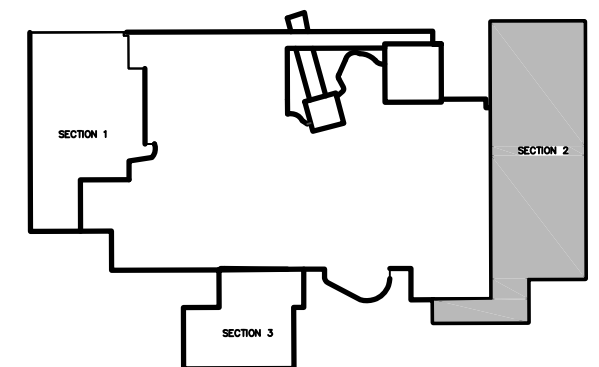


SYMBOL LEGEND

○	PLUMBING VENT (SOIL STACK)
∅	HOODED VENT
■	AIR CONDITIONER
■	PITCH PANS
●	PIPE PENETRATION
---	DIVIDER WALL
⊕	CORE LOCATION
—	GAS LINE
□	EXHAUST FAN
⊙	ROOF DRAIN
●	SUPPORT PIPE

ROOF AREAS

SECTION	SQ. FT.
1	7,660
2	10,871
3	4,248
TOTAL	22,779



KEY PLAN

01
RP-3

SECTION 3 ROOF PLAN

SCALE: 3/32"=1'-0"



Building Science Solutions
Building and Construction

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Patient Protection and Affordable Care Act (PPACA) Discussion for Plan Year 2021/22

In preparation for the library's healthcare plan renewal, which will be approved by the board in June 2021 for the plan year August 1, 2021 through July 31, 2022, the board will again discuss the advantages and disadvantages of the library's full compliance with the Patient Protection and Affordable Care Act (PPACA). When the board held this discussion in 2020 for the 2021 plan year, you asked to have the situation explained in writing moving forward, rather than the verbal outline previously provided. Marian Nicholson and Eva Davis have prepared this document to provide you with the background, the options, and their impacts for your discussion and direction as to how the library should proceed.

BACKGROUND

Currently, Canton Public Library policy [Employee Policy Handbook] limits the offer of healthcare insurance to regular full-time employees. However, section 6056 of the PPACA requires applicable large employers, which includes CPL, to offer healthcare coverage to all full-time equivalent (FTE) employees (defined by PPACA as all employees averaging at least 130-hours per month in a measurement period).

For calendar year 2020, Canton Public Library reported to the Internal Revenue Service an average of twenty-four (24) FTE eligible employees; twenty (20) regular full-time employees offered coverage and four (4) FTEs not offered coverage.

IRS Employer Mandate requirement 4980H (a) states: Applicable large employers (ALE) must offer minimum essential coverage (MEC) to at least 95% (or all but 5, if greater) of FTE employees and their dependents each month. CPL is currently not liable for the 4980H (a) penalty as we meet the "all but 5" criteria.

IRS Employer Mandate requirement 4980H (b) states: ALE must offer coverage that provides minimum value and is affordable to all FTE employees each month. The penalty for noncompliance is up to \$3,860 per FTE employee who enrolls through a public exchange and qualifies for a tax subsidy. CPL could be liable for the 4980H (b) penalty, up to a maximum of \$15,440.

OPTIONS & IMPACTS

The addition of four (4) employees and their dependents to our current healthcare plan, BCN's Healthy Blue Living, results in an estimated cost increase of ~\$102,000 per plan year (assumes 80/20 cost sharing and the enrollment of one [1] family, two [2] couples and one [1] single, based on current average contract costs). If we do not extend health coverage to eligible FTEs in July 2021, we may be subject to a maximum annual penalty of up to \$15,440 under employer mandate requirement 4980H (b).

EXPAND COVERAGE TO COMPLY WITH FEDERAL LAW

- CPL will be compliant with current PPACA mandates.
- All employees who qualify for coverage as defined under PPACA (averaging at least 130-hours per month in a measurement period) will be offered the CPL healthcare plan. As of calendar year 2021, the offer would be extended to four (4) additional employees and their spouses and/or dependents.
- Employees purchasing healthcare coverage through CPL will pay with pre-tax dollars.

- Employees who receive an offer of CPL healthcare coverage will not be eligible for Marketplace subsidies if they elect to decline CPL coverage and purchase a plan on their own through the public exchange.
- Library administration will update the CPL Employee Policy Handbook to reflect the change in policy to expand healthcare coverage beyond regular full-time staff, to include all employees who meet the PPACA eligibility requirements.
- Cost of extending healthcare coverage is estimated at \$102,000 annually, based on the current contract costs for four (4) additional eligible employees and their spouses and/or dependents.

RETAIN CURRENT COVERAGE PER LIBRARY POLICY

- CPL will continue to be non-compliant with federal law under current PPACA mandates.
- Only regular full-time employees as defined by the Employee Policy Handbook will be offered the CPL healthcare plan for the 2021-2022 contract year.
- Employees who are not covered by CPL's healthcare plan and purchase healthcare coverage through the Marketplace will pay with post-tax dollars.
- Employees with no offer of CPL healthcare coverage may be eligible for Marketplace subsidies.
- If a PPACA-eligible employee purchases their own coverage through the public exchange and qualifies for subsidies, CPL will be liable for a potential annual penalty, currently \$3,860 per eligible employee, for a total exposure of \$15,440 for the 2020-21 measurement period.

BOARD DISCUSSION

The board's discussion this evening will provide direction to library administration as we work with Kapnick Insurance to research healthcare providers and plans for the 2021-22 plan year. If the board directs us to continue offering coverage only to regular full-time employees as per our Employee Policy Handbook, we will proceed with Kapnick to evaluate plans and pricing. If the board directs us to expand the offer of coverage to comply with federal law, we need time to make those offers and work with Kapnick to update our employee census data and receive bids.

In both cases, the board will review the providers and plans and vote to approve one at your June 24, 2021 meeting, as well as vote on the PA 152 employer/employee insurance premiums cost-sharing, either hard cap or 80%/20% split, as you do annually.