



**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.

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.

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.

Amy Watts, Secretary-Treasurer

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><u>7,832,842.29</u></u> | <u><u>8,765,001.70</u></u> |
| LIABILITIES & EQUITY | | |
| Liabilities | | |
| Current Liabilities | | |
| Accounts Payable | | |
| 000-202 · Accounts Payable | 21,442.52 | 11,752.22 |
| Total Accounts Payable | <u>21,442.52</u> | <u>11,752.22</u> |
| Credit Cards | | |
| 000-208 · Chase - Visa 3651 | 1,314.36 | 5,193.08 |
| 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 | 1,208.71 | 1,208.71 |
| Total 000-229 · Grants/Donations-Restricted Use | <u>5,225.12</u> | <u>5,110.26</u> |
| 000-237 · Medical Saving Deduction MedFSA | 2,204.89 | 3,246.33 |
| 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 | 3,464,956.30 | 4,402,000.71 |
| Total Equity | <u>7,802,655.40</u> | <u>8,739,699.81</u> |
| TOTAL LIABILITIES & EQUITY | <u><u>7,832,842.29</u></u> | <u><u>8,765,001.70</u></u> |

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

| | <u>Jan - Feb 21</u> | <u>Budget</u> | <u>\$ Over Budget</u> | <u>% of Budget</u> |
|-----------------------------------------|---------------------|---------------------|-----------------------|--------------------|
| 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 | <u>5,358,061.74</u> | <u>6,328,500.00</u> | <u>(970,438.26)</u> | <u>84.67%</u> |
| Gross Profit | <u>5,358,061.74</u> | <u>6,328,500.00</u> | <u>(970,438.26)</u> | <u>84.67%</u> |
| 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 | <u>956,061.03</u> | <u>6,912,680.00</u> | <u>(5,956,618.97)</u> | <u>13.83%</u> |
| 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 | <u>7,827,896.11</u> | <u>2,841,715.00</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 | | | | |
| 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

| | <u>Jan - Feb 21</u> | <u>Budget</u> | <u>\$ Over Budget</u> | <u>% of Budget</u> |
|--------------------------------------------|---------------------|---------------------|-----------------------|--------------------|
| 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 | <u>19,581.11</u> | <u>248,350.00</u> | <u>(228,768.89)</u> | <u>7.88%</u> |
| 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 | <u>1,659.90</u> | <u>17,400.00</u> | <u>(15,740.10)</u> | <u>9.54%</u> |
| Total 738-940 · Rentals/Leases | <u>1,659.90</u> | <u>17,400.00</u> | <u>(15,740.10)</u> | <u>9.54%</u> |
| 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 | <u>12,805.00</u> | <u>1,087,600.00</u> | <u>(1,074,795.00)</u> | <u>1.18%</u> |
| 738-996 · Property Tax Refunds | 675.65 | 1,500.00 | (824.35) | 45.04% |
| Total Expense | <u>956,061.03</u> | <u>6,912,680.00</u> | <u>(5,956,618.97)</u> | <u>13.83%</u> |
| 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 | <u>7,827,896.11</u> | <u>2,841,715.00</u> | | |

4:01 PM
03/01/21
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: Jurassi | -4.99 | 6,716,399.32 |
| Bill Pmt -Check | 02/11/2021 | 51706 | Miscellaneous Vendor | NorthStar Medical Equipment - Adult & I | -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 |

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 |

4:01 PM
 03/01/21
 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**

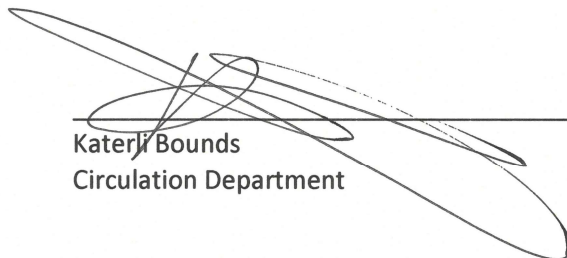
Final – March 10, 2021

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:



Kateri Bounds
Circulation Department



Lisa Craig
Information Services Department



Gale Forster
Circulation Department



Laurie Golden
Community Relations Department



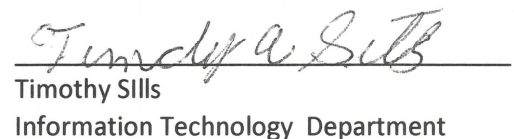
Megan Hathaway
Information Services Department



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 (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.

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

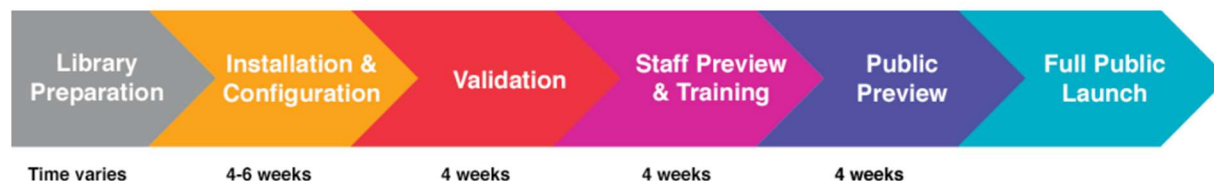
| | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <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><i>The Basics</i></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://gpld.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."

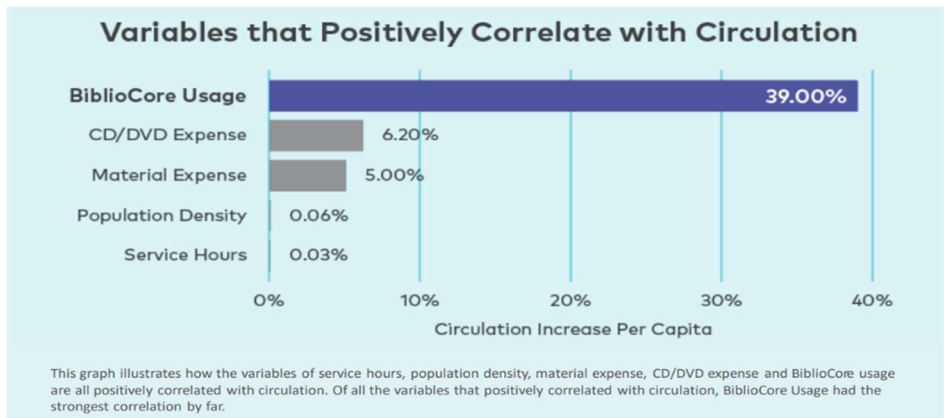
With BiblioCommons Libraries Thrive

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

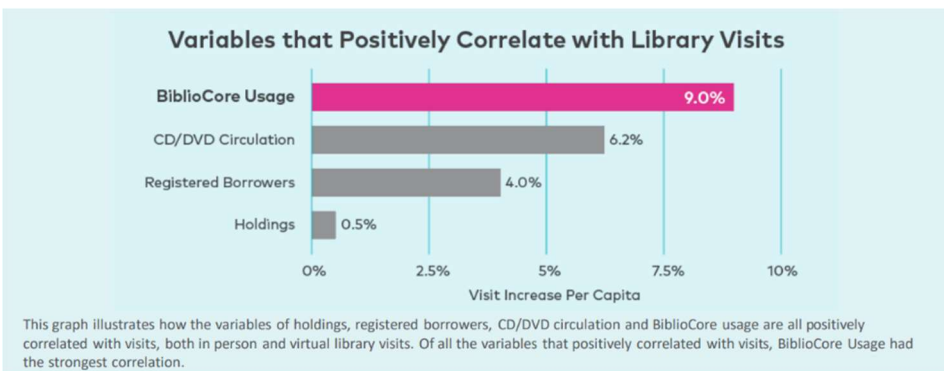


“The graph below shows how different variables positively impacted visits. Of all the variables that positively correlated with visits, BiblioCore Usage had the strongest correlation by a moderate margin.”



9% ↑

more visits per capita
with BiblioCore



“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://skokielibrary.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)

Prepared by:

Beth Jefferson, CEO & Co-Founder, BiblioCommons

Teresa Harris, Marketing Manager, BiblioCommons

Table of Contents:

| | |
|----------------------------------------------------------------------------|----|
| It's time to re-evaluate and ensure that Drupal remains the right solution | 3 |
| Why have so few organizations upgraded to Drupal 8? | 4 |
| Migration is a significant undertaking | 5 |
| Drupal's value proposition for smaller organizations has changed | 6 |
| It's clear—Drupal's headed upmarket | 7 |
| Drupal 8's major rewrite — new, shiny, and unproven | 7 |
| Object-oriented programming presents a steep learning curve | 8 |
| Why are smaller agencies dropping Drupal? | 12 |
| So, what's next for libraries? | 13 |
| Static Site Generators | 13 |
| Backdrop CMS | 13 |
| Wagtail | 13 |
| Headless CMSs | 14 |
| Wordpress | 14 |
| Do-it-yourself | 14 |
| Software as a Service | 14 |
| SaaS — the rising tide that lifts all boats | 15 |
| What is vertical SaaS? | 16 |
| Why is vertical SaaS perfect for libraries? | 18 |
| Is now the time to adopt a cost-effective, library-focused solution? | 18 |
| References | 19 |

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.”

“We're more about big sites and less about small sites... 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.”

—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:

```

1. git pull origin master
2. vagrant up
3. drush sql-sync @mysite.prod @mysite.local
4. composer require drupal/core:^8.6.6 --upda
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
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

```

Update

Deploy

Play (k)

Many steps

Requires developer expertise

Can be required multiple times a month!

Code

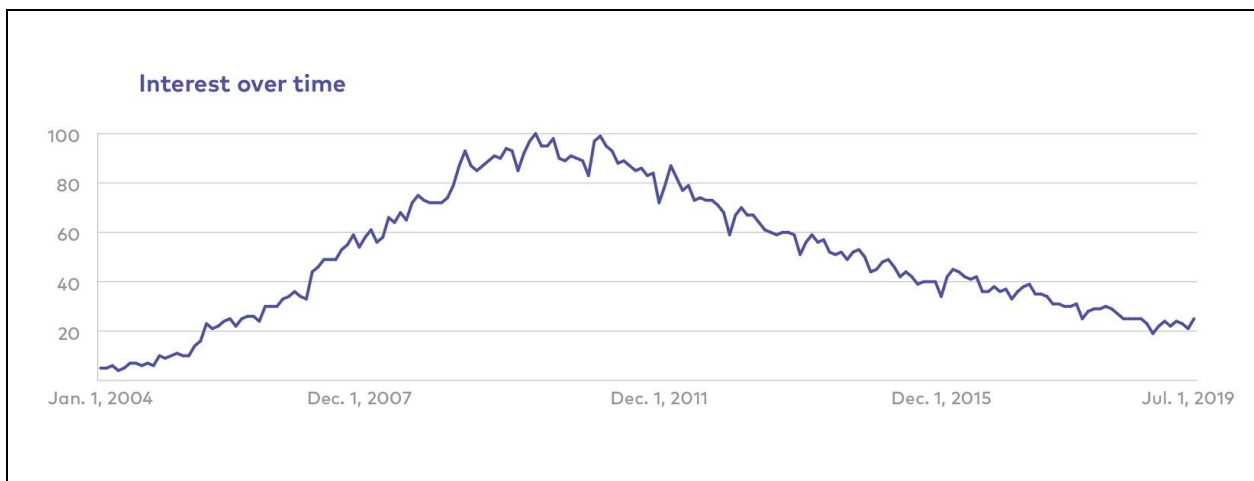
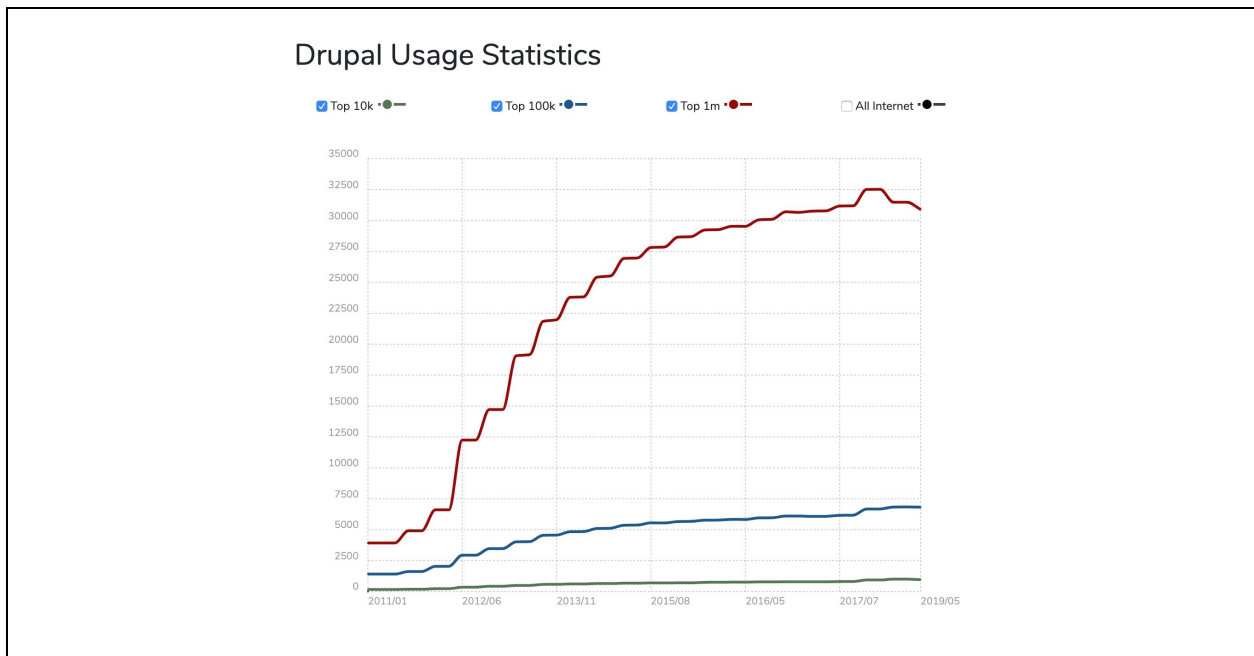
Database

Config

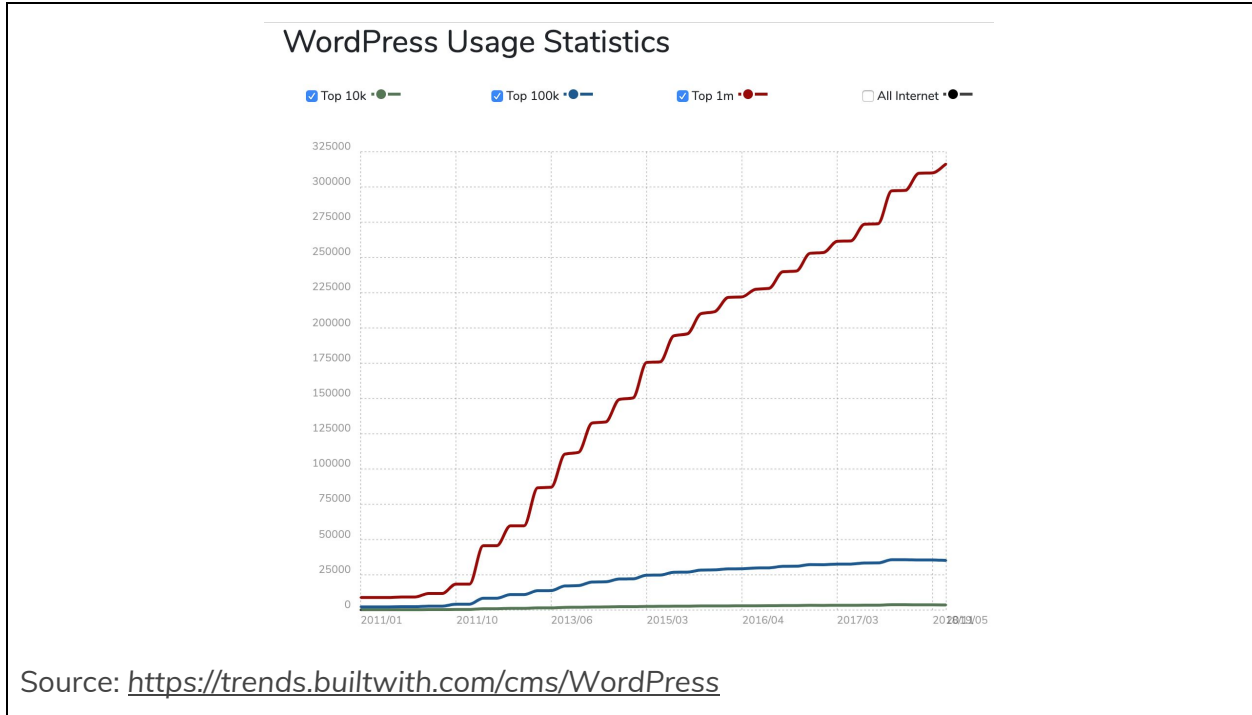
Drupal 8’s non-existent auto updates means maintenance is increasingly complex.

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 |

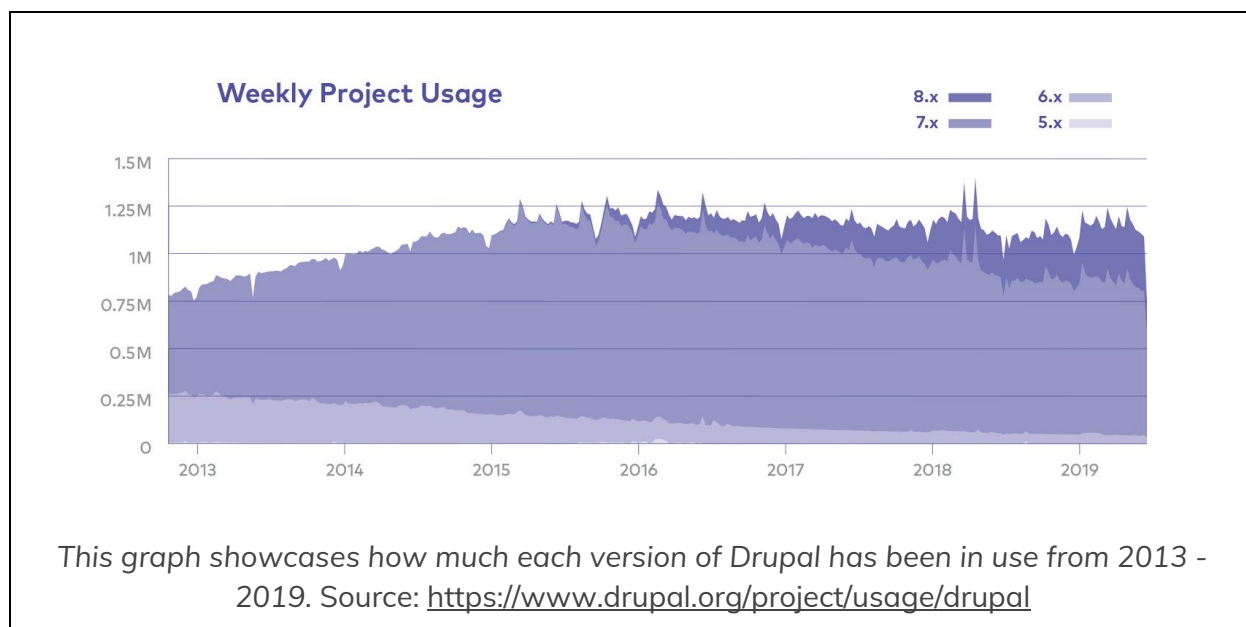
We know of at least **24,808,989** live websites using WordPress.

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.

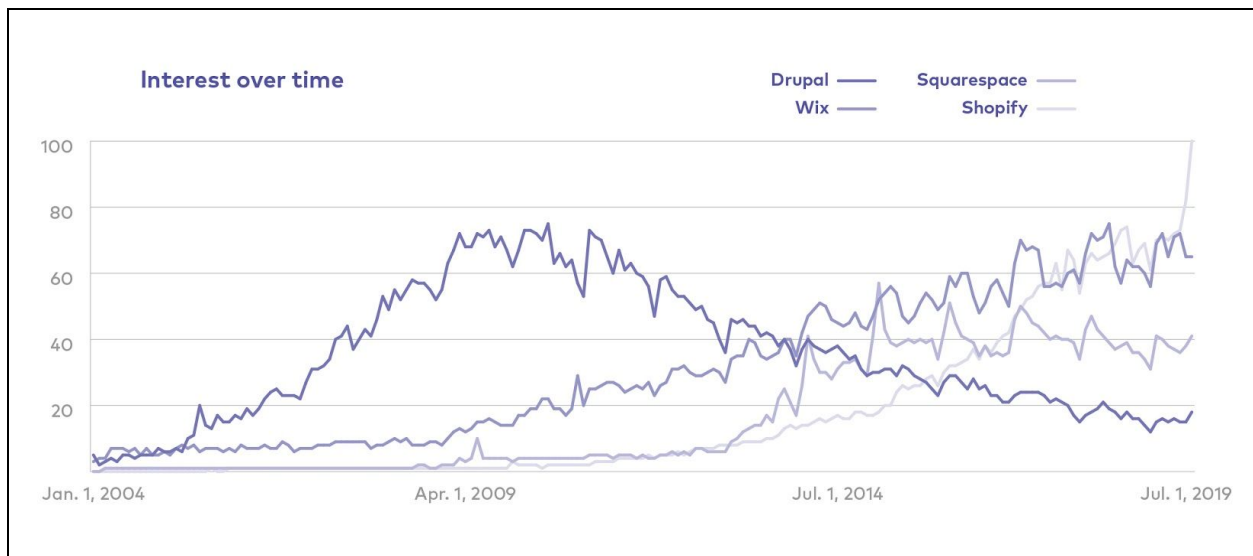
Software as a Service

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

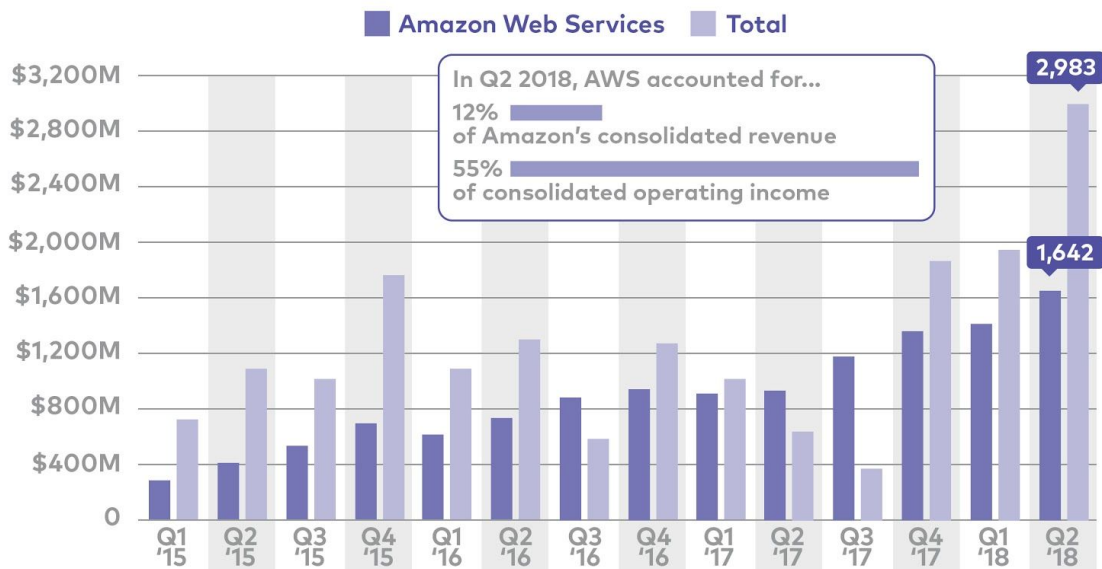
SaaS is a model in which the software is licensed and the solution is accessed through the internet. Customers do not install or download any local software; instead, the vendor is responsible for the security, uptime and updates. Over the last 10 years, the SaaS market has grown dramatically, far outpacing 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. //

References:

1. (2018) *Why is Drupal now the second most hated platform behind Sharepoint?* Retrieved June 26, 2019 from https://www.reddit.com/r/drupal/comments/84u23f/why_is_drupal_now_the_second_most_hated_platform/
2. Boucher, Stephen. (2019, May 12). *Why Drupal matters*. Retrieved July 3, 2019 from <https://obj.ca/article/why-drupal-matters>
3. Buytaert, Dries. (2006, May 17). *Backward compatibility*. Retrieved June 28, 2019 from <https://dri.es/backward-compatibility>
4. Buytaert, Dries. *Locations and Attendance*. Retrieved June 28, 2019 from <https://www.drupal.org/association/drupalcon/locations>
5. Buytaert, Dries. *Usage statistics for Drupal core*. Retrieved July 3, 2019 from <https://www.drupal.org/project/usage/drupal>
6. *CVSS Scores For Drupal Drupal Between 2018-01-01 and 2019-01-01*. Retrieved June 28, 2019 from https://www.cvedetails.com/cvss-score-charts.php?fromform=1&vendor_id=&product_id=2387&startdate=2018-01-01&enddate=2019-01-01
7. Editorial Staff. (2019, May 8). *The History of WordPress from 2003 – 2019 (with Screenshots)*. Retrieved June 27, 2019 from <https://www.wpbeginner.com/news/the-history-of-wordpress/>
8. *Google Trends: drupal search term*. Retrieved June 27, 2019 from <https://trends.google.com/trends/explore?date=all&q=drupal>
9. Kabir Aion, Mainul. (2019, June 21). *Top Websites Using WooCommerce for eCommerce*. Retrieved June 26, 2019 from https://wedevs.com/89524/top-websites-using-woocommerce/?utm_source=blog&utm_medium=hyperlink&utm_campaign=best-ecommerce-platform&utm_content=5
10. Koontz, Christie and Barbara Gubbin. (2010, July). *IFLA Public Library Service Guidelines*. Retrieved June 27, 2019 from <https://www.degruyter.com/viewbooktoc/product/43971?rskey=G0DzHu>
11. Lansbury, Owen. (2017, November 20). *Have We Reached Peak Drupal?* Retrieved from June 27, 2019 from <https://www.previousnext.com.au/blog/have-we-reached-peak-drupal>
12. Locke, John. (2011, October 14). *Top 6 reasons Drupal really sucks -- Developer Edition*. Retrieved from June 27, 2019 from <https://www.freelock.com/blog/john-locke/2011-10/top-6-reasons-drupal-really-sucks-developer-edition>
13. Olivas, Jesus. (2014, May 21). *Why is Symfony in Drupal 8, and how Does that Change Things?* Retrieved from June 27, 2019 from

- <https://ffwagency.com/learning/blog/why-symfony-drupal-8-and-how-does-change-things>
14. Pushpathadam, Tom. *WordPress vs SaaS: The Case for SaaS Website Builders*. Retrieved June 27, 2019 from <https://www.verycleverdesign.com/blog/wordpress-vs-saas>
 15. Spilotro, Chloe. (2018, May 23). *Drupal 8 Migration: There Has To Be Another Way*. Retrieved June 27, 2019 from <https://www.zesty.io/mindshare/marketing-technology/drupal-8-migration-there-has-to-be-another-way/>
 16. Usage of content management systems. Retrieved June 26, 2019 from https://w3techs.com/technologies/overview/content_management/all/
 17. Valley Voices. (2019, March 1). *Vertical Software Is Growing Up: The 10 Things You Need To Know*. Retrieved June 26, 2019 from <https://www.forbes.com/sites/valleyvoices/2019/03/01/vertical-software-10-things-to-know/#fa33e3c24359>
 18. Vivek. (2019, January 2). *How did the SaaS market perform in 2018?* Retrieved June 26, 2019 from <https://omoto.io/academy/saas-in-2018/>
 19. Widmer, Gerry. (2018, August 1). *What is Drupal? Is Drupal 8 Right for My Business?* Retrieved from June 27, 2019 from <https://www.zesty.io/mindshare/marketing-technology/what-is-drupal--is-drupal-8-right-for-my-business-/>
 20. WooCommerce. Retrieved June 26, 2019 from <https://en-ca.wordpress.org/plugins/woocommerce/>

LIBRARY SUBSCRIPTION MASTER AGREEMENT

THIS LIBRARY SUBSCRIPTION AGREEMENT (this “**Agreement**”) is made this 15th day of April, 2021 (“**Effective Date**”) between BiblioCommons Corp., a corporation constituted under the laws of the Province of Ontario, Canada (“**BiblioCommons**”) and the **Canton Public Library**, a public library created under the laws of the State of Michigan (“**Subscriber**”) (Individually, a “**Party**” and collectively, the “**Parties**”). The terms and conditions of this Agreement shall govern the Service(s) (as defined below) to be provided by BiblioCommons under any Order Form (as defined below) executed by the Parties, as though the provisions of this Agreement were set forth in their entirety within such Order Form.

NOW THEREFORE in consideration of the mutual promises and covenants herein, and other good and valuable consideration, the sufficiency of which is acknowledged by the Parties, the Parties agree as follows:

1. DEFINITIONS AND PRINCIPLES OF INTERPRETATION

1.1 Definitions.

Whenever used in this Agreement, the following words and terms shall have the meanings set out below:

- (a) “**Agreement**” has the meaning ascribed to it in the introductory paragraph;
- (b) “**Authorized Patron**” means a person who has a numbered library account with Subscriber and is authorized by Subscriber to use the Service;
- (c) “**BiblioCommons**” has the meaning ascribed to it in the introductory paragraph;
- (d) “**Breaching Party**” has the meaning ascribed to it in Section 7.1(b) hereof;
- (e) “**Business Day**” means a day, other than a Saturday or a Sunday or statutory holiday in the jurisdiction of either Party;
- (f) “**BiblioWeb Service**” has the meaning set out in the applicable Order Form;
- (g) “**Confidential Information**” means any information disclosed by a Party to the other Party pursuant to this Agreement in a context which would cause a reasonable person to believe the information is intended to be treated as confidential, including but not limited to, documents expressly designated as confidential, any information related to BiblioCommons proprietary services and software including the Service, Secure Personal Information, and information related to

Subscriber’s processes, products, employees, facilities, equipment, security systems, information systems, finances, marketing plans, suppliers, or distributors; provided, however that “**Confidential Information**” shall not include information that: (i) is now available or becomes available to the public without breach of this Agreement; (ii) is explicitly approved for release by written authorization of the Disclosing Party; (iii) is lawfully obtained from a third party or parties without a duty of confidentiality; (iv) is disclosed to a third party by the Disclosing Party without a duty of confidentiality; (v) is known to the Receiving Party prior to disclosure; (vi) is at any time developed by the Receiving Party independently of any such disclosure(s) from the Disclosing Party; or (vii) must be disclosed as required by law;

- (h) “**Core**” or “**Core Service**” has the meaning set out in the applicable Order Form;
- (i) “**Disclosing Party**” has the meaning ascribed to it in Section 5.1 hereof; to
- (j) “**Designated Person**” is the person designated by the Subscriber to receive all notices, consent and other communication. See Sections 9.12, 9.13 and 9.14;
- (k) “**Effective Date**” has the meaning ascribed to it in the introductory paragraph;
- (l) “**Fees**” means the fees for the Services set out in the applicable Order Form, as adjusted for Renewal Terms from time to time as set out in Section 3.1(b);
- (m) “**Force Majeure Event**” has the meaning ascribed to it in Section 9.4;
- (n) “**ILS**” means the Subscriber’s Integrated Library System, used for library circulation, cataloging and other services;
- (o) “**Initial Term**” has the meaning ascribed to it in Section 2.2 hereof;
- (p) “**Intellectual Property Right**” means any intellectual property right recognized by law, including any intellectual property right protected through legislation (such as that governing patents, copyright or trademarks) or arising from protection of information as a trade secret, confidential information or common law trademark right;
- (q) “**Order Form**” has the meaning ascribed to it in Section 3.1(a) hereof;
- (r) “**Parting**” has the meaning ascribed to it in Section 7.2 hereof;
- (s) “**Party**” or “**Parties**” has the meaning ascribed to it in the introductory paragraph.

(t) “**Privacy Statement**” means the statement of BiblioCommons’ privacy practices that shall govern BiblioCommons’ collection, use and disclosure of Personal Information of Authorized Patrons which, as of the Effective Date, is attached as Schedule “E”, and which may be amended by BiblioCommons from time to time;

(u) “**Receiving Party**” has the meaning ascribed to it in Section 5.1 hereof;

(v) “**Renewal Term**” has the meaning ascribed to it in Section 2.2 hereof;

(w) “**Secure Personal Information**” means personally identifiable information that is provided by a User in the registration process or personal account settings on the Service, or is transferred to the Service from the ILS; notwithstanding the foregoing “Secure Personal Information” shall not include Shared Content or information an individual has chosen to transmit or share through a feedback service provided on the Service, web-forms on the BiblioWeb service (if any) or an entry in any context which is, by design, publically viewable;

(x) “**Shared Content**” has the meaning ascribed to it in the Privacy Statement;

(y) “**Service**” means a range of services purchased as set out in the applicable Order Form;

(z) “**Subscriber**” has the meaning ascribed to it in the introductory paragraph;

(aa) “**Technical Requirements**” has the meaning ascribed to it in Section 3.2 hereof;

(bb) “**Term**” means the duration of the Initial Term and any Renewal Term;

(cc) “**Terms of Use**” means the terms of use that govern the use by Authorized Patrons of the Service which, as of the Effective Date, is attached hereto as Schedule “F”, and which may be amended by BiblioCommons from time to time;

(dd) “**User**” means an Authorized Patron who has registered with BiblioCommons to use the Service.

1.2 Schedules.

This Agreement contains the following schedules, each of which are attached and incorporated into this Agreement:

- Schedule “A” – Template Order Form
- Schedule “B” – Support Services
- Schedule “C” – Service Levels
- Schedule “D” – Technical Requirements
- Schedule “E” – Privacy Statement
- Schedule “F” – Terms of Use
- Schedule “G” – Additional Fees

1.3 Calculation of Time.

When calculating the period of time within which or following which any act is to be done or step taken pursuant to this Agreement, the date which is the reference day in calculating such period shall be excluded. Any payment or action to be made or taken on a day other than a Business Day in either jurisdiction shall be made or taken on the immediately following day that is a Business Day in the jurisdictions of both Parties.

2. BIBLIOCOMMONS OBLIGATIONS

2.1 Delivery of Service.

During the Term, BiblioCommons shall make the Service available via the Internet to Authorized Patrons and grant to Subscriber a non-exclusive and non-transferable right to use the Service. Authorized Patrons are subject to and may be required to agree to the Terms of Use and Privacy Statement.

2.2 Term.

Unless terminated earlier as provided herein, this Agreement is for a period of one (1) year from the Effective Date (the “**Initial Term**”). In the event an Order Form contains Services that are being added to an existing subscription, such added Services shall be coterminous with the Initial Term or applicable Renewal Term and shall be billed from the applicable Order Form Effective Date according to the Fees corresponding to such Order Form. Unless terminated pursuant to Section 7.1, upon expiration of the Initial Term, this Agreement and the related Schedules and Order Forms will renew automatically for subsequent one-year renewal terms at then current prices (each, a “**Renewal Term**”), provided that BiblioCommons provides notice to Subscriber of such prices at least ninety (90) days prior to the end of the Term and unless either Party notifies the other Party of its intention to not renew this Agreement at least sixty (60) days prior to the end of the Term.

2.3 Changes to the Service.

BiblioCommons may, from time to time and at any time, in its sole discretion, introduce upgrades and updates to the Services that are consistent with the service description set out in the applicable Order Form at no additional charge.

2.4 Maintaining Community Standards.

The Service allows Users to flag user-generated content they feel does not conform to the Terms of Use. When content is flagged three times, or as many times as may be determined by BiblioCommons in its sole discretion, BiblioCommons will:

- Remove flagged content from public view; and
- Notify the User who contributed the content, and provide directions for appealing the removal.

Any appeals will be compiled and at least once each month BiblioCommons will review any appeals to assess whether the removed content conforms with the Terms of Use in effect at the time of removal.

2.5 Support.

BiblioCommons will use commercially reasonable efforts to support the Services in accordance with the service levels and remedies outlined in Schedule “B” Support Services.

2.6 Service Level.

BiblioCommons will use commercially reasonable efforts to provide the Core Service in accordance with the service levels and remedies outlined in Schedule “C” Service Levels. Notwithstanding anything herein to the contrary:

- BiblioCommons may interrupt the Service for security purposes;
- The Service is dependent on the Internet and availability and performance may be impacted by the availability and performance of the Internet.

2.7 Indemnity.

BiblioCommons shall indemnify, hold harmless and defend Subscriber from and against all third party claims, demands, losses, damages, costs and expenses (including reasonable attorneys’ fees) (“Claims”) made against or incurred, suffered or sustained by the Subscriber, in connection with, or relating to, or arising out of any allegation or claim that the Service itself violates or infringes any third party intellectual property rights except to the extent such Claim is related to the acts or omissions of the Subscriber, its Authorized Patrons or any of its respective agents or contractors; provided that, BiblioCommons is provided with (i) prompt written notice of any third party claim; (ii) all necessary assistance, information and authority necessary for BiblioCommons to defend a third party claim and perform its obligations under this Section; and (iii) sole control of the defense of such claim and all associated negotiations.

2.8 Michigan Library Privacy Act.

Where applicable, BiblioCommons will comply with the Michigan Library Privacy Act, PA 455 of 1982, as amended.

3. SUBSCRIBER OBLIGATIONS

3.1 Order Forms, Fees and Payment.

(a) Order Form.

Subscriber shall order a Service by completing and signing an order form, a template of which is set out in Schedule “A” attached hereto (each, an “**Order Form**”). Each accepted, fully executed Order Form shall become incorporated herein by reference as successive Exhibits (e.g. Exhibit A-1, Exhibit A-2 etc.).

In the event that Subscriber’s business practices require a purchase order number be issued prior to payment of any BiblioCommons invoices pursuant to the applicable Order Form, then such purchase order number must be provided to BiblioCommons prior to the activation of the Service. Subscriber’s execution and return of the applicable Order Form to BiblioCommons without designating a purchase order number shall be deemed an acknowledgement that no purchase order number is required for payment of the invoices hereunder. Additionally, terms, provisions or conditions on any purchase order, acknowledgment, or other business form or writing that Subscriber may use in connection with the provision of Service(s) from BiblioCommons will have no force and effect on the rights, duties or obligations of the Parties, regardless of any failure of BiblioCommons to object to such terms, provisions or conditions.

(b) Fees.

All Fees are exclusive of amounts payable as tax or any other registration or operating fee that may be levied against BiblioCommons by national, state or local authorities in whose jurisdiction Subscriber operates and that pertain to the provision of the Service during the Term. Such amounts will be payable by Subscriber. Fees are based on Services purchased, not actual usage. Payment obligations are non-cancelable and Fees paid are non-refundable. The price actually charged for a specific Service will be the price in effect at the time the Service is requested. On the anniversary date of an Order Form, BiblioCommons reserves the right to increase the Fees for the Services upon notice to the Subscriber. BiblioCommons reserves the right to modify its Fees, charges and/or to introduce new charges at any time, upon at least ninety (90) days prior notice to Subscriber, effective upon the next Renewal Term.

(c) Payment Terms.

Payments shall be due 30 days from receipt of an invoice by the Subscriber from BiblioCommons. Payments not received when due will accrue interest at the lower of (i) one percent (1%) per month, or (ii) the highest rate

allowed by applicable law. BiblioCommons or its agent shall have the right to recover all collection costs from the Subscriber. Without limiting its other remedies, if Subscriber is late in its payments at any time, BiblioCommons or its agent may request reasonable assurances or deposits to secure Subscriber's payment obligations hereunder.

(d) Non Payment.

In the event that full payment is not made by the Subscriber within 60 days of the date of receipt of an invoice by the Subscriber, BiblioCommons or its agent may send to the Subscriber a written requirement for payment and if payment is not received within thirty days of the date of receipt of that notice by the Subscriber, BiblioCommons may terminate this Agreement as set out below in Section 7 (Termination). However, this right may be waived upon mutual written confirmation between BiblioCommons and the Subscriber of their intent to continue service delivery in spite of payment delays.

3.2 Technical Requirements.

Subscriber ILS and bibliographic and patron data shall meet minimum standards attached and incorporated as Schedule "D" (the "**Technical Requirements**").

4. INTELLECTUAL PROPERTY RIGHTS

4.1 Ownership of Intellectual Property Rights.

As between BiblioCommons and Subscriber, all rights, title and interest, including all Intellectual Property Rights, related to the Service and related software and documentation, including without limitation, any and all upgrades, updates, improvements, fixes, additions, enhancements, modifications and derivative works thereto, shall remain with BiblioCommons. Nothing in this Agreement shall grant to either Party any ownership or other Intellectual Property Rights of the other Party other than as expressly set out in this Agreement. Nothing in this Agreement shall grant to either Party any ownership or any Intellectual Property Rights to content generated by Users in connection with their use of the Service.

4.2 Control of Trade-marks.

Subscriber acknowledges that "**BiblioCommons**" is a trade-mark of BiblioCommons and shall not be used by Subscriber except as expressly provided in this Agreement and otherwise only with the written consent of BiblioCommons and in accordance with any trade-mark guidelines that may be provided by BiblioCommons from time to time.

5. CONFIDENTIAL INFORMATION

5.1 Disclosure; Standard of Care.

The Parties acknowledge that, in the course of this Agreement, each Party (a "**Disclosing Party**") may disclose Confidential Information to the other (a "**Receiving Party**"). Each Receiving Party shall hold such Confidential Information in trust for the sole benefit of the Disclosing Party. Each Receiving Party shall protect the other Party's Confidential Information from unauthorized dissemination, disclosure and use with the same degree of care that each such Party uses to protect and safeguard its own like information, but not less than a reasonable degree of care given the sensitivity and strategic value of such Confidential Information. Confidential Information shall be disclosed only to the employees and subcontractors of the Receiving Party who have a "need to know" and who have executed an internal nondisclosure agreement at least as restrictive as the terms of this Agreement. A Receiving Party shall not disclose any Confidential Information to any third party without first obtaining the Disclosing Party's written consent to such disclosure unless such disclosure is required by law. A Receiving Party may further disclose Confidential Information to such Party's professional advisors in connection with the negotiation and performance of this Agreement and in connection with the advisor's consideration of disclosures that may be required by law, provided such advisors are informed of the obligations of confidentiality. In the event that a Receiving Party is compelled to disclose a Disclosing Party's Confidential Information, in the course of litigation or otherwise, or a compelled disclosure is reasonably anticipated, the Receiving Party shall give immediate notice to the Disclosing Party of such fact and shall provide all reasonable cooperation to the Disclosing Party at the sole expense of the Disclosing Party in obtaining a protective order to prevent the disclosure of Confidential Information.

6. WARRANTIES

6.1 BiblioCommons Warranties.

BiblioCommons hereby represents and warrants to Subscriber that: (a) BiblioCommons is legally incorporated and validly exists as a corporation under the laws of Ontario; (b) BiblioCommons has the power and authority to enter into the Subscriber Agreement; (c) The individual signing this Agreement has the power and authority to sign such documents; (d) It will use its commercially reasonable efforts to maintain the systems associated with the Service free from viruses, Trojans and other harmful code; and (e) The Service will be performed

in a professional, workmanlike manner, commensurate with industry practices within the industry in which BiblioCommons operates.

6.2 Subscriber Warranties.

Subscriber hereby represents and warrants to BiblioCommons that: (a) Subscriber is a public library under the laws of the State of Michigan; (b) Subscriber has the power and authority to enter into the Subscriber Agreement; (c) the individual signing this Agreement has the power and authority to sign such documents; and (d) Subscriber will use commercially reasonable efforts to avoid transmitting to BiblioCommons any viruses, Trojans and other harmful code.

6.3 Warranty Disclaimer.

BiblioCommons provides the Service using a commercially reasonable level of skill and care and BiblioCommons hopes that its customers (including both library staff and patrons) will enjoy accessing and using these Services. However, there are certain things that BiblioCommons does not promise about the Services. Some jurisdictions provide for certain warranties, like the implied warranty of merchantability and fitness for a particular purpose. BiblioCommons will honour its statutory obligations. To the extent permitted by law, BiblioCommons excludes all warranties outside of those listed in Section 6.1. Unless otherwise required by law, the Service and any software provided in connection with the Service is provided by BiblioCommons under this Agreement on an “as is” basis. Except as otherwise stated in this Agreement, BiblioCommons and its licensors make no (and hereby disclaim all) warranties, representations and conditions whatsoever (whether express or implied; written or oral; arising by statute, operation of law or otherwise) regarding the Service provided under this Agreement, including without limitation, any implied warranty or condition of merchantable quality, fitness for a particular purpose, non-infringement or arising from a course of dealing, title, usage of trade or course of performance. Without limiting the generality of the foregoing, while BiblioCommons will meet its service and support obligations laid out in the Agreement, BiblioCommons makes no warranty that the operation of the Service will be error-free or that it will produce a desired result beyond such obligations.

7. TERMINATION

7.1 Termination.

This Agreement may be terminated at any time:

- (a) if either BiblioCommons or Subscriber has filed or commenced, or suffered or submitted to the filing or commencement of, any bankruptcy or insolvency proceeding under the law of its domicile or incorporation;
- (b) by either Party if the other Party breaches the terms and provisions of this Agreement provided the Party alleging that the other Party is in breach (the “**Breaching Party**”) provides written notice to such Breaching Party of the alleged breach. The Breaching Party shall have 30 days to remedy such breach, unless such breach cannot reasonably be remedied within 30 days, in which case the Breaching Party shall make all reasonable efforts within 30 days to begin to remedy the alleged breach and shall remedy such breach within a time period that is commercially reasonable to complete such remedy.

Notwithstanding the termination or expiration of this Agreement, Articles 1, 4, 5, Section 6.3, Article 7, Article 8 and Article 9 shall survive the termination or expiration of this Agreement.

7.2 Treatment of Patron-Contributed Data upon Termination.

In the event of a termination of this Agreement or should a renewal agreement not be established after the Term (a “**Parting**”), BiblioCommons shall provide at Subscriber’s request and upon the payment of the cost-recovery fee set forth in Schedule G, a transfer of all User-generated bibliographic annotations for use by Subscriber in association with an alternate service, provided by Subscriber itself or by a third party, that adheres to the Terms of Use and Privacy Statement. In addition, in the event of a Parting, Subscriber agrees that BiblioCommons will send a customer service communication, subject to Subscriber approval which shall not be unreasonably withheld, explaining the User’s options and their implications through such transition, to all Users who have:

- (a) communicated or established connections with one or more persons who are registered users of a BiblioCommons service;
- (b) initially approached the Service for registration through a website that is not affiliated with Subscriber;
- (c) subscribed to syndicated information from one or more persons who are registered users of a BiblioCommons service; or

(d) syndicated their information or content from BiblioCommons to other websites.

Secure Personal Information on BiblioCommons servers that is associated with Users who do not choose to continue their participation in a BiblioCommons service will be deactivated within ninety (90) days of a Parting.

8. LIMITATION OF LIABILITY

8.1 Limitations of Liability.

Except for any claims of misappropriation of intellectual property and for fees due under Article 3, in no event shall either Party be liable for: (i) indirect, special, consequential, incidental or punitive losses, damages or expenses or lost profits or savings even if it has been advised of their possible existence; or (ii) aggregate liability under this Agreement to the other Party exceeding the aggregate amount of the Fees paid by Subscriber to BiblioCommons during the 12 month period immediately preceding the date of any such claim. This limitation of liability extends to any alleged liability arising under the law of contracts, torts, negligence or any legal or equitable theory whatsoever.

9. GENERAL

9.1 Good Faith and Fair Dealing.

Each Party agrees that it shall, with respect to the other Parties, and in all matters related to this Agreement, act in good faith and in accordance with reasonable commercial standards.

9.2 Publicity.

Each Party may issue a public statement or general marketing communications announcing the relationship under this Agreement without the prior written consent of the other Party. For the sole purpose of marketing and promoting the Service and for the Term of this Agreement only, each Party hereby grants to the other Party the non-exclusive non-transferable right to use and display such party's logos and trade-marks in the other Party's websites and marketing materials, subject to compliance with the originating Party's trade-mark guidelines provided to the other Party from time to time.

9.3 Entire Agreement.

This Agreement together with all of the terms in the applicable Order Form constitute the entire understanding of the Parties with respect to the subject matter hereof and supersedes all prior agreements, understandings and negotiations, both written and oral, between the Parties with respect to the subject matter hereof and thereof. No representation, inducement, promise, understanding, condition or warranty not set forth herein, or incorporated

by reference herein, has been made or relied upon by any Party hereto.

9.4 Force Majeure.

Neither Party shall be liable for any damages, delays or failure in performance under this Agreement caused by acts or conditions beyond its reasonable control or without its fault or negligence (each, a "**Force Majeure Event**"), including but not limited to "acts of God", delays caused by governmental authorities, strikes, lockouts and other labour unrest, delays in obtaining governmental approvals and similar conditions. A Party shall, in order to avail itself of any of the provisions of this Section, promptly send a written notice of the Force Majeure Event to the other Party, including a description of the Force Majeure Event, its expected duration and a description of the actions being taken by the Party to mitigate the effect of the Force Majeure Event.

9.5 Severability.

For the purposes of this section, the Parties acknowledge and agree that each and every term of this Agreement is of the essence. If any one or more of the provisions contained in this Agreement should be declared invalid, illegal or unenforceable in any respect, the validity, legality and enforceability of the remaining provisions contained in this Agreement shall not in any way be affected or impaired thereby so long as the commercial, economic and legal substance of the transaction contemplated hereby are not affected in any manner materially adverse to any Party. Upon such a declaration, the Parties shall modify this Agreement so as to carry out the original intent of the Parties as closely as possible in an acceptable manner so that the transactions contemplated hereby are consummated as originally contemplated to the fullest extent possible.

9.6 Further Assurances.

Each Party shall at any time and from time to time, upon each request by the other Party, execute and deliver such further documents and do such further acts and things as the other Party may reasonably request to evidence, carry out and give full effect to the terms, conditions, intent and meaning of this Agreement.

9.7 Amendments.

This Agreement may be modified or amended only with the mutual written consent of the Parties.

9.8 Assignment.

Neither Party may assign its rights or obligations hereunder without the written consent of the other Party, except that BiblioCommons may assign this Agreement

to any third party, without consent, in connection with any sale, amalgamation, reorganization or similar transaction involving a sale of all or substantially all of its shares or assets, provided that such assignee adopts this Agreement.

9.9 Subcontracting.

BiblioCommons may subcontract portions of the Service, provided that BiblioCommons shall remain responsible for all of its obligations under this Agreement as the original contracting party hereto.

9.10 No Waiver.

No failure or delay by any Party in exercising any of its rights or remedies hereunder will operate as a waiver thereof, nor will any single or partial exercise of any such right or remedy preclude any other or further exercise thereof or the exercise of any other right or remedy. Except as otherwise provided herein, the rights and remedies of the Parties provided in this Agreement are cumulative and not exclusive of any rights or remedies provided under this Agreement, by law, in equity or otherwise.

9.11 No Agency.

The Parties are not partners or joint venturers; neither Party is the agent, representative, or employee of the other Party; and nothing in this Agreement will be construed to create any relationship between them other than an independent contractor relationship. Neither Party will have any responsibility or liability for the actions of the other Party except as specifically provided herein. Neither Party will have any right or authority to bind or obligate the other Party in any manner or make any representation or warranty on behalf of the other Party.

9.12 Dispute Resolution Process.

(a) Escalation Procedure.

Any dispute between the Parties shall first be referred to the persons designated in this Agreement for the receipt of Notices (the “**Designated Persons**”), by written notice of the dispute including the material facts. The Designated Persons shall attempt to resolve the dispute and shall escalate it to the appropriate management representatives of the Parties as may be considered appropriate.

(b) Arbitration.

If the Designated Persons are unable to resolve the dispute pursuant to Section 9.12(a) within 30 days, the dispute may be submitted by either Party to final and binding arbitration administered by the American Arbitration Association in accordance with its Commercial

Arbitration Rules, and judgment on the award rendered by the arbitrator may be entered in any court having jurisdiction thereof. Claims shall be heard by a single arbitrator. The place of arbitration shall be the State of Michigan. Notwithstanding any provision of this Agreement relating to which state laws govern this Agreement, all issues relating to arbitrability or the enforcement of the agreement to arbitrate contained herein shall be governed by the Federal Arbitration Act (9 U.S.C. §§ 1 et seq.) and the federal common law of arbitration. The arbitrator shall award to the prevailing party, if any, as determined by the arbitrator, all of their costs and fees. “Costs and fees” mean all reasonable pre-award expenses of the arbitration, including the arbitrator’s fees, administrative fees, travel expenses, out-of-pocket expenses such as copying and telephone, court costs, witness fees, and attorneys’ fees.

(c) Exception from Mandatory Arbitration.

Notwithstanding any provision of this Section 9.12, a Party shall be able to seek interim or injunctive relief before a court of competent jurisdiction for a breach or a threatened breach of any provision of this Agreement dealing with confidential information or intellectual property rights. For the purposes of the foregoing, each Party expressly attorns to the jurisdiction of the courts of the State of Michigan and waives any claim or defence of inconvenient forum.

(d) Conduct During Dispute.

If the Dispute Resolution process described in Section 9.12 is in progress, BiblioCommons shall continue to provide the Service to Subscriber, and Subscriber shall continue to make any payments required under this Agreement. If, at the conclusion of the dispute resolution process, it is determined that such payments were not required to be made, all such amounts shall be refunded by BiblioCommons with simple interest at 1% per month.

9.13 Notices.

All notices, consents and other communications required or which may be given under this Agreement will be in writing and will be deemed to have been duly given when given by hand, by courier, or by email confirmed by the recipient. If sent outside business hours of the addressee, such notice, consent or other communication will be deemed to have been duly given at the beginning of the next Business Day. Notices, consents and other communications shall be addressed to a Party at its address set forth below, or at such other address as a Party may hereafter designate by notice given in accordance with the terms hereof.

| | |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| If for BiblioCommons: | BiblioCommons Corp. 119 Spadina Ave. Suite 1000 Toronto, ON M5V 2L1 Canada Attention: General Manager with a copy to: Volaris Group Inc. 5060 Spectrum Way, Suite 100, Mississauga, ON L4W 5N5 Canada Attention: Steve Camicata, General Counsel |
| If for Subscriber: | Eva Davis, Director Canton Public Library 1200 S. Canton Center Road Canton, MI 48188 734-397-0999 x1065 davise@cantonpl.org |

9.14 Counterparts; Facsimile.

This Agreement may be signed in any number of counterparts, each of which shall be an original, with the same effect as if the signatures thereto and hereto were upon the same instrument, and facsimile or scanned signatures shall be deemed original. This Agreement shall become effective when each Party hereto shall have received an original, scanned or faxed counterpart hereof signed by each other Party hereto.

9.15 Governing Law and Venue.

This Agreement has been executed and delivered in, and shall be construed and enforced in accordance with, the laws of the State of Michigan. The Parties agree that no action taken by either party will be heard by a jury.

IN WITNESS WHEREOF the Parties have executed this Agreement as of the date first above written.

BIBLIOCOMMONS CORP.

CANTON PUBLIC LIBRARY

Name:

Name:

Title: General Manager

Title:

SCHEDULE "A"
TEMPLATE ORDER FORM

(Attached)



Order #: 00000853

Canton Public Library

1200 South Canton Center Road
Canton, Michigan 48188
United States

Population: 90,173
Population Source: PLDS

Date: March 11, 2021

Valid Until: June 11, 2021

PO #(Optional):

Term: April 15, 2021 – April 14, 2022

All Fees are in USD

BiblioCore

See Schedule "A-1."

Rate: \$0.1027044/pop. or \$12,500 minimum

Annual Subscription Fee: \$12,500.00**One-Time Implementation Fee: \$15,536.00**

BiblioWeb

Includes BiblioEvents. See Schedules "A-4" and "A-6."

Rate: \$0.139434/pop. or \$40,000 minimum.

Annual Subscription Fee: \$40,000.00**One-Time Implementation Fee: \$27,122.00**

BiblioCloudRecords - OverDrive

Provide in BiblioCore, for Subscriber's OverDrive holdings as exposed via Subscriber's OverDrive API key, automatic record creation and indexing for search and record removal for expired content.

Rate: 15% of Core, minimum \$5,000. Implementation fee of \$500.

Annual Subscription Fee: \$5,000.00**One-Time Implementation Fee: \$500.00**

Please note: Implementation of services is conducted remotely.

BiblioCloudRecords - Hoopla

Provide in BiblioCore, for Subscriber's Hoopla holdings as exposed via Subscriber's Hoopla API key, automatic record creation and indexing for search and record removal for expired content, not including Hoopla music records.
 Rate: 10% of Core, minimum \$3,000. Implementation fee of \$500.

Annual Subscription Fee: \$3,000.00

One-Time Implementation Fee: \$500.00

Subscription Fees: \$60,500.00

Implementation Fees: \$43,658.00

Total Due this Year, payable on the date hereof: \$104,158.00

This Order Form supplements the Library Subscription Master Agreement ("Agreement") dated April 15, 2021 and is incorporated therein by reference. Capitalized terms not defined herein shall have the meanings set forth in the Agreement. In the event of a conflict with this Order Form and the Agreement, the Order Form will govern. All fees payable by Subscriber are exclusive of taxes.

Attached Service descriptions, if any, shall be incorporated by reference herein. The Parties acknowledge and confirm that the Services set out in this Order Form will be provided in addition to any services that Subscriber has also purchased with other Order Form(s).

IN WITNESS WHEREOF the parties hereto have caused this Order Form to be duly executed by their proper authorized officers.

| BiblioCommons Corp. | | Canton Public Library (MI) | |
|----------------------------|-----------------|-----------------------------------|--|
| Signature | | Signature | |
| Name | | Name | |
| Title | General Manager | Title | |
| Date | | Date | |

SCHEDULE “A-1” BiblioCore Service Description

The Service will provide a discovery layer for Subscriber’s holdings and provide user account management. The “Core Service” will include:

Synchronisation and mapping of metadata

- The mapping of bibliographic and item metadata from Subscriber’s ILS for use in the Core Service
- Synchronisation of bibliographic (MARC21) and item record metadata between BiblioCommons servers and Subscriber’s ILS

User library account

Authorised users are prompted to create a BiblioCommons account on their first login, this allows users to manage their library materials and leverage BiblioCore functionality.

- View on hold items
 - Cancel on hold items
 - Suspend and resume on hold items
 - Change pickup location of on hold items (when supported by the ILS)
- View checked out items
 - Renew checked out items
- View fines and fees
- View borrowing history (when enabled/supported by the ILS)
- View interlibrary loan requests (when supported by the ILS)

Placing holds

- Presented to users throughout the product, including from search results and bibliographic records
- Includes support for title and item level holds

Search

- Basic search options for keyword, title, author, subject, series, tags, lists
- Advanced search interface
- FRBRised search results display
- Faceted search results display
- Sort options for search results display
- Keyword search suggestions (‘auto suggest’)
- “Did you mean...” functionality
- Graduated search feature: “Broaden your search”
- Itemised display of holdings (availability of items by location)

Explore

- Automated display of new and on order titles
- Ability for staff to configure links on the new titles page to direct users to specific areas of the collection
- Extensive award and bestseller lists with titles matched to the library’s collection.

Bibliographic Record Page

On the bibliographic record page the following is displayed:

- Bibliographic metadata from Subscriber’s ILS
- Itemised display of holdings (availability of items by location)
- Community contributed content for a title
- Integration of content from third-party subscription provided by Subscriber
 - Syndetic Solutions
 - Content Cafe

- NoveList
- StackMap

User Dashboard

From the User Dashboard, users can:

- View a summary of their library account
- View a summary of their Shelves
- View available titles from their ‘For later’ shelf
- View recommended titles (when Subscriber has supported third-party recommendation provider)
- View the user’s own recent activity in the catalog
- View the activity of other users who they ‘follow’ from the catalog

User Profile

From the user profile, users can:

- View and edit their own profile
- View and manage users who are ‘following’ them
- View and manager users they are ‘following’

From the BiblioCore service, users can:

- View profiles of other users
- Follow, unfollow, and block other users
- View catalog activity of other users when this is indicated as ‘public’
- Send messages to other users of the BiblioCore service

Personal record keeping

Users can:

- Keep track of titles by adding them to shelves
- Add community contributed content
- Add a personal tag
- Add a personal note
- Indicate ‘I own this’
- Indicate that shelf items are ‘private’

Community contributed content

- Authenticated users can contribute content, including:
 - Rating
 - Comment
 - Quotation
 - Summary
- A peer moderated flagging system is used, which allows users to flag:
 - Spoilers
 - Offensive content
 - Content that violates the BiblioCommons Terms of Use.
- Users under the age of 13 have different capabilities depending on the country the library is located in (for example, inability to send private messages, inability to contribute free-text community contributed content)

Lists

Users can:

- Create and annotate a List of titles
- Add titles from the catalog
- Add webpages using URLs
- Add list item annotations

- Make a list public or private

Administration Tools

Staff with the appropriate permissions can:

- Run high-level activity reports
- Add system messages
- Configure hold pickup locations
- Configure navigation options displayed in the site header
- Assign tiered permission levels to user accounts

BiblioCommons Developer API

BiblioCommons Developer API can be used to query:

- Search results
- Lists
- Community contributed content

BiblioCommons will provide upgrades to the Service at no additional cost. Notwithstanding the above, BiblioCommons reserves the right to charge separate fees for additional services outside the scope of what is described here.

SCHEDULE “A-4” BiblioWeb Service Description

The BiblioWeb Service is a software as a service made available to users through the Internet. It will include the following functionality and work:

1. Cards & Page Builder Functionality
 - a) A range of card types for use on Custom Pages, including: blog, news, list, event, online resource.
 - b) Ability to create, edit, delete and arrange BiblioWeb modules like the BiblioEvents Widget, Catalog Carousel, and Card Collection, on Custom Pages using a drag and drop interface.
 - c) Ability to preview pages.
 - d) Ability to revert back to previous published versions of a page.
 - e) Ability to use BiblioWeb templates or create brand new templates.
 - f) Ability to add, edit, and remove terms from card taxonomies.

2. Blogging
 - a) Staff WYSIWYG editor to create and edit posts.
 - b) The ‘Add a Title’ widget in the WYSIWYG editor facilitates adding titles from BiblioCore, making the blog appear in the catalog. (Note: this functionality is not optimized for consortia.)
 - c) Ability to preview posts.
 - d) Built-in ILS-authenticated user commenting for blog posts, with user facing peer-moderated flagging system.

3. Standard Pages
 - a) Access to a simple WYSIWYG editor for creating Standard Pages.
 - b) Ability to create, edit, delete and preview standard pages.
 - c) Ability to revert back to previous versions of a page.

4. Online Resources
 - a) Ability to create, edit and delete online resources and descriptions.
 - b) Ability to organize online resources by multiple taxonomies

5. Frequently Asked Questions
 - a) Ability to create, edit and delete frequently asked questions.
 - b) Ability to create categories to organize FAQs.
 - c) Ability to display FAQs on Custom Pages

6. Library Location Pages
 - a) Library address, hours, contact information and photo are displayed.
 - b) Locations easily accessible via navigation.
 - c) Ability to search for closest locations by ZIP code or postal code.
 - d) Daily schedules will have current day highlighted.

7. Forms
 - a) Ability to create, edit and delete forms using a variety of form fields.
 - b) Ability to make fields required.
 - c) Ability to set-up email notification for staff when a form is submitted.
 - d) The confirmation message that is presented to users is configurable.
 - e) All content submitted via forms is archived and accessible on the website. Content is purged after 12 months.

f) Users can submit information to the library through online forms.

8. Site Display & Administration

- a) The website will be responsive.
- b) Library logo, colours and font will be applied to the website during implementation.
- c) Seamless navigation and search box across BiblioCore, BiblioEvents and BiblioWeb.
- d) BiblioCommons will provide a static asset file for the header and footer for use on other websites.
- e) PDFs and images can be added to the media library. A third-party service should be used to host videos.
- f) Lib Admins can assign staff one of the 5 pre-configured tiered permission levels.
- g) Ability to display a system message on BiblioWeb.
- h) Ability to provide patron-friendly URL aliases for some content types, like pages, blog posts and news posts
- i) Ability to create page redirects that direct users to pages that replace decommissioned content.
- j) Access to a link checker to validate that URLs are live.
- k) Site usage statistics via integration with your library's Google Analytics ID

BiblioCommons will not create, configure or manage website content as part of the BiblioWeb Service.

BiblioWeb was not designed to handle sensitive data and is not PCI compliant. Credit card, banking and social security information should not be collected through the BiblioWeb forms module, nor through embedding an iframe or other third-party service on the site.

SCHEDULE “A-6”

BiblioEvents Service Description

The Events Service will include:

1. Tiered permissions
 - a. Tiered permission levels to allow admins the ability to create, edit, and publish events.
 - b. Ability to add taxonomy terms to program type, event type, audience type, non-branch location and language type taxonomies.
2. Create and Manage Events
 - a. Free form fields include: event name, description (with WYSIWYG editor), registration contact information, location details, staff notes.
 - b. Structured fields and taxonomies include: date, start time, end time, recurrence pattern, location (including online event flag), audience, event type, program type, language, registration type (no registration required, online (with option for waitlist), offline (with free form field for instructions)).
 - c. Ability to add images.
 - d. Ability for staff with event permissions to mark an event as cancelled or full.
3. Search and Browse Events
 - a. Browse
 - i. Chronological list view of events that can be narrowed by all event facets (i.e. date, locations, event types, programs, audiences, and languages).
 - b. Search
 - i. Keyword events search, with the results sorted chronologically.
 - ii. Ability to refine search by all event facets, including online events, event type, audience, location, language and program name. Multiple facets may be applied.
 - iii. Ability to search events by proximity (e.g. address or zip code).
 - iv. Ability to search by date.
 - c. Event Details Page
 - i. Full event information is listed.
 - ii. Display of map to show event location.
 - iii. Similar events cross-merchandised.
 - iv. Ability to share events to various social networks.
 - v. Ability to add event to desktop or online calendar (Google Calendar, Yahoo Calendar, Outlook and iCal)
4. Header Integration
 - a. Search box includes events option.
 - b. Same header as BiblioCore.
5. Reporting
 - a. Ability to export events to a delimited format.

SCHEDULE “B” POST IMPLEMENTATION SUPPORT

After BiblioCore or BiblioWeb is implemented, BiblioCommons provides ongoing support. Support work varies in timing and scope depending on the issue type. The definition of issue types (I), the severity classification for each issue type (II), and the response commitments for each severity level (III) are defined below.

I. Definition of Issue Types

BiblioCommons organizes library feedback into four types of issue, summarized here and defined below in turn:

- A. Questions: Understanding BiblioCore, BiblioWeb or other services.
- B. Tasks: Tasks specific to your library
- C. Suggestions: Improving BiblioCore or BiblioWeb and designing new functionality.
- D. Corrections: Fixing BiblioCore or BiblioWeb when not working as designed.

A. Questions

BiblioCommons distinguishes two types of questions, with corresponding response commitments described in Section III below.

- 1) Questions or notifications about updates affecting your ILS or Tomcat server.
- 2) Other questions.

To help answer questions, BiblioCommons maintains an online Partner Portal. This includes:

- a Knowledge Base with answers to frequently asked questions and official documentation for other self-help,
- Community pages with forums for peer-to-peer questions and answers, and
- an Online Ticketing system where libraries can submit questions not answered elsewhere. Response commitments for questions are described below.

B. Configuration Tasks

Configurations determine the way in which BiblioCore or BiblioWeb interoperate with local library technology and services. After implementation, libraries may request configuration changes to support changes in the ILS, in library marketing and branding, or in branch locations and programing.

C. Suggestions

BiblioCommons continually reinvests in product design and development, and library suggestions are an important input. Please use the ['Community' area](#) of the Partner Portal to submit your suggestions.

D. Corrections

BiblioCore and BiblioWeb are evolving products that interoperate with changing third-party software and hardware, from library ILSs to patron smartphone systems. As a result of changes on all sides, BiblioCommons products can sometimes stop working as designed and require correction.

BiblioCommons corrects bugs in BiblioCore or BiblioWeb, with the timing and scope of correction proportionate to the severity of the problem. The severity of an issue is determined by

- The importance of the feature affected, and
- The prevalence of the outage.

The resulting severity levels and the response commitments for each are defined further below (in sections II and III, respectively).

1) Definition of issue importance

| Importance of Issue | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary | Secondary | Tertiary |
| BiblioCore Service | | |
| <p>Issues that prevent (on a supported desktop web browser):</p> <ul style="list-style-type: none"> ● Site availability; ● Availability of: <ul style="list-style-type: none"> ○ Registration ○ Login ○ Search ○ Holds ○ Renewals. ○ Single Sign-On (SSO) ○ Real-time item availability | <ul style="list-style-type: none"> ● Issues that prevent synchronization of: <ul style="list-style-type: none"> ○ bibliographic records (additions, deletions, edits), and ○ item availability. ● Issues that prevent (on a supported desktop or mobile web browser) personal record-keeping and community-contributed content: <ul style="list-style-type: none"> ○ My Shelves ○ Lists ○ Star Ratings ○ Reviews & Comments ○ Following & Ignoring ○ Messaging ○ Other Community Functionality. ● Issues that prevent (on a supported mobile browser) | <p>All other issues or requests including:</p> <ul style="list-style-type: none"> ● Text changes and cosmetic issues not affecting site functionality ● Changes to mapping of configurable features -- formats, audience, availability status, etc. ● Analytics issues. <p>Other issues not covered in primary and secondary.</p> |

| | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <p>interaction with any feature listed in the two bullets in the “Primary” column for the BiblioCore service.</p> <ul style="list-style-type: none"> ● Issues that affect the availability of the Core APIs. ● Cosmetic issues affecting site functionality <p><i>If applicable:</i></p> <ul style="list-style-type: none"> ● Visibility of BiblioCloudRecords ● Rendering augmented content supplied by others ● Create and view functions for BiblioSuggest. ● Visibility of links for Combined Catalog ● Access fines-payment service provided by others ● Translations ● Search results are incorrectly scoped. | |
| BiblioWeb Service | | |
| <p>Issues that prevent:</p> <ul style="list-style-type: none"> ● Site availability ● Availability of the footer ● Availability of Find-a-Location Page ● BiblioEvents widget display ● Availability of Online-Resources pages ● BiblioWeb Admin Login; <p>Or issues that cause a loss of major functionality on the Homepage - e.g.:</p> <ul style="list-style-type: none"> ● Stylesheets not loading, ● Cards not loading ● Homepage Manager not accessible. | <p>Issues that prevent:</p> <ul style="list-style-type: none"> ● Availability of individual Location Pages ● Creation or publication of blogs or news posts ● Ability to manage Browse pages ● Ability to manage Program pages ● Creation or submission of forms ● Creation of FAQs ● Ability to upload and access media <p>Or cosmetic issues affecting site</p> | <p>All other issues or requests including:</p> <ul style="list-style-type: none"> ● Text changes and cosmetic issues not affecting site functionality ● Availability of Archival Collections & Special Content ● Availability of sidebar widgets ● Analytics <p>Other issues not covered in primary and secondary.</p> |

| | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| | functionality. | |
| BiblioEvents Service | | |
| <p>Issues that prevent:</p> <ul style="list-style-type: none"> • Registration for events • Creating/editing events • Search for events • Visibility of event listings • Availability of information on Event Details Page. | <p>Issues that prevent:</p> <ul style="list-style-type: none"> • Availability of reporting data <p>Or cosmetic issues affecting site functionality</p> | <p>Other issues including text and cosmetic issues not affecting site functionality</p> <p>Other issues not covered in primary and secondary.</p> |
| BiblioApps Service | | |
| <p>Widespread issues affecting app activation, login, holds and renewal will be treated as critical priority. All other issues will be treated as normal or low priority. This space will be updated with a full list of categories when the redesigned apps are launched.</p> | | |

2) Definition of prevalence

| | | |
|------------------------------|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Prevalence of failure | All users | <ul style="list-style-type: none"> • Feature outages are estimated to be system-wide, found consistently across any use of the feature on all supported browsers and across multiple patrons |
| | Majority of users | <ul style="list-style-type: none"> • Feature outages are estimated to affect a significant portion of average monthly users of the library’s online presence or staff |
| | More than a few users | <ul style="list-style-type: none"> • Feature outages are estimated to affect a small portion of average monthly users of the library’s online presence, but still big enough to suggest that there might be a pattern to the issue |
| | A few users | <ul style="list-style-type: none"> • Feature outages are estimated to affect just a handful of users |

II. Severity classification

Based on the issue type (I), the following severity classifications are assigned. In the following section, response commitments for each type are described.

| A. Questions | | B. Configuration Tasks | C. Suggestions |
|-----------------------------------------|-----------------|------------------------|----------------|
| 1) Regarding your ILS and Tomcat Server | 2) Other Topics | | |
| Normal | Low | Normal | Low |

| D. Corrections | | | |
|--------------------------|-----------|--------------------------|----------|
| | | 2) Importance of feature | |
| 1) Prevalence of Failure | Primary | Secondary | Tertiary |
| All | Emergency | Critical | Normal |
| Many | Emergency | Critical | Low |
| Few | Critical | Normal | Low |
| One | Normal | Low | Low |

III. Response Commitments.

| | Severity Level | | | |
|-------------------------|----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| | Emergency | Critical | Normal | Low |
| Contact Method | <p>Online Ticket Entry</p> <p>or</p> <p>Backup Emergency Phone Line</p> | <p>Online Ticket Entry</p> | <p>Online Ticket Entry</p> <p>or</p> <p>Self-help through Partner Portal</p> | <p>Online Ticket Entry</p> <p>or</p> <p>Self-help through Partner Portal</p> |
| Start Review Commitment | Immediate. | Next working business hour. | Within two business days. | Within two business days. |
| Start Work Commitment | Immediate | Within one business day. | In context of ongoing work. | As resources allow. |
| Resolution Commitment | Work until resolved, except where blocked by third-party dependencies. | If possible without code changes, usually resolved within 24 hours. If code changes are needed, BiblioCommons may release a hotfix, or else defer code changes to an upcoming release Feature Release. | In the context of ongoing work. | As resources allow. |

Online ticket entry

BiblioCommons manages support through an online ticketing system built into the BiblioCommons Partner Portal. This is the standard gateway for all communications with BiblioCommons Support. BiblioCommons will supply access to this service to the Library for the purpose of issue tracking.

All issues including emergencies should be reported to BiblioCommons through online support tickets. Once Requests are submitted they will be triaged, with resources and scheduling assigned based on an assessment of the importance of the issue.

Backup Emergency Phone

A toll-free emergency phone number will be made available to library staff as a backup measure for emergencies. However for the best results, we encourage staff to create tickets online. BiblioCommons staff will be reachable at this number 24/7. The current phone number is **1 (855) 436-6381 x 0**.

SCHEDULE "C" **SERVICE LEVELS**

BiblioCommons will use commercially reasonable measures to make the Core, Web and Events services available with a minimum uptime standard of 99.5%, excluding scheduled maintenance windows or any unavailability resulting from a Subscriber's applications, equipment, facilities, or employees.

Service Unavailability

At the request of the Subscriber, BiblioCommons will calculate Subscriber's Service Unavailability for the previous month. "Service Unavailability" consists of the number of minutes that the Core Service was not available to Subscriber, and includes any unavailability associated with any unscheduled maintenance. Outages will only be counted if Subscriber notifies BiblioCommons within five business days of the outage.

Service Unavailability will not include:

- a) any scheduled maintenance;
- b) any unavailability resulting from a Subscriber's applications, equipment, facilities, or employees;
- c) any acts or omissions of Subscriber, or any use or user of the Service authorized by Subscriber; and
- d) any event outside the commercially reasonable control of BiblioCommons and Force Majeure events as defined in the Agreement.

Remedy

Subscriber's exclusive remedy for a failure of the Service shall be that for any continuous period of 24 hours or more of Service Unavailability, at Subscriber's request, Subscriber's Term shall be extended for one additional week without additional charge.

Scheduled Maintenance

The Subscriber acknowledges that the Service may not be available to Subscriber and Authorized Patrons during scheduled maintenance. For the purposes of this paragraph, "Scheduled Maintenance" only refers to planned, routine maintenance carried out by BiblioCommons that has the effect of significantly limiting the functions of the Service available to Subscriber and Authorized Patrons.

BiblioCommons shall limit Scheduled Maintenance to ten hours per month and shall make reasonable efforts to notify Subscriber of Scheduled Maintenance not less than twenty-four hours in advance.

SCHEDULE “D” TECHNICAL REQUIREMENTS

Subscriber must meet the following requirements in order to take advantage of the Service. These requirements may be amended from time to time by BiblioCommons in accordance with evolving technical standards in the industry.

ILS SERVER AND DATABASE

- The ILS server must be an instance of an ILS system as may be agreed to by BiblioCommons.
- The ILS server must offer or accommodate a reliable programmatic method:
 - to access cataloguing and patron data; and
 - to execute circulation requests on behalf of a User
 - to execute any other ILS-based services stipulated in this Agreement.
- Libraries must be able to provide the version number of the ILS application and its underlying database and operating system. Database version is only required for CARL.X, Evergreen and Horizon ILSs.
- The ILS must perform user authentication via barcode and PIN (personal identification number) or password.

CONNECTOR

The Services will communicate with Subscriber’s ILS via a connector, which will either be locally hosted in Subscriber’s network (the “Local Connector”) or hosted by BiblioCommons (the “Cloud Connector”). Connector type will be determined based on Subscriber’s ILS. The following requirements will apply based on the connector type.

CLOUD CONNECTOR

Access

- Subscriber shall ensure that full access to the ILS API is externally available.
 - BiblioCommons uses technical and logical controls to protect its environment and to ensure that users can only access and act on information for which they have authorization.
 - Any additional security requirements from Subscriber may be accommodated for a supplementary implementation fee by written agreement.

LOCAL CONNECTOR

Tomcat Server

- There must be a new and correct installation of Apache Tomcat on a server (“the Tomcat server”) in the library environment. Tomcat Manager must be installed using BiblioCommons’ pre-configured Tomcat instance, or installed to meet BiblioCommons’ configuration requirements.
- There must be an instance of Java 1.8 on the Tomcat server, and it must be modifiable as BiblioCommons requirements evolve.
- Tomcat must be available through Subscriber’s firewall to the BiblioCommons servers with sufficient privileges and access required to comply with integration requirements.
- As required for monitoring and testing, BiblioCommons must be given unconditional SSH or Remote Desktop access to the server running Tomcat. In the event that such access is not provided by Subscriber, the uptime standard and remedy outlined in Schedule “C” will be void and additional subscription fees will apply (see “If Subscriber Does Not Meet the Required Conditions” below).
 - Access must be provided through a single set of credentials.
- Applicable only for Symphony ILS:
 - The Tomcat Server must be installed on the same server in which any Unicorn/Symphony API server commands are located.
 - For Unicorn/Symphony, the Tomcat Server must be run using the ‘sirsi’ user.

Hardware

- The Tomcat server CPU must have at least 2Ghz in processing speed, or processing speed that provides response time that is acceptable to Subscriber and BiblioCommons
- The Tomcat server must have a minimum of 512 MB of available RAM (for small libraries, under 25,000 population served), 1 GB (for medium libraries, under 100,000 population served) or 1 GB or more (for large libraries).
- The Tomcat server must have a minimum 5 GB of free space on the hard-drive.
- The Tomcat server CPUs must not exceed 50% utilization (with existing, non-BiblioCommons load).

Access

- The standard security configuration provides for access to the ILS connector by opening a port in Subscriber's firewall to BiblioCommons servers.
 - BiblioCommons uses technical and logical controls to protect its environment and to ensure that users can only access and act on information for which they have authorization.
 - Any additional security requirements from Subscriber may be accommodated for a supplementary implementation fee by written agreement.
- During the testing and acceptance phase, if any incompatibilities with API calls arise, BiblioCommons will be granted SSH access to the system in order to verify API calls. Libraries using Symphony will need to grant SSH access to the system with the 'sirsi' user in order to verify API calls.

BANDWIDTH

- The library's communication (all network communication from the connector to the ILS server, the ILS database, and to the external Internet) must be through a high-speed, reliable Internet connection: 5Mbps bi-directional (upload/download) or better for a small or medium-sized library, or 44Mbps bi-directional or better for a large library serving a population over 100,000.

ASSISTANCE

To successfully launch and maintain the BiblioCommons service, Subscriber must be prepared to provide:

- A Project Manager (the "Library Project Manager") to act as a liaison between your library and BiblioCommons;
- A lead technical contact.

USER INTERFACE

Subscriber will be asked to provide graphic elements that meet basic usability criteria and specifications of the application.

IN-LIBRARY TERMINALS

BiblioCommons offers support for in-library terminals for the following browsers:

- Internet Explorer
- Firefox
- Safari
- Chrome

An up-to-date listing of the oldest supported browsers will be posted here: <http://www.bibliocommons.com/how-we-work/supported-browsers>

Other browser support may be provided by written agreement.

DATA QUALITY

In order to facilitate BiblioCommons data transfers and the sharing of information among patrons and libraries, BiblioCommons has deployed the following minimum standards for data, which are preconditions for the Service. BiblioCommons has worked with other libraries to develop these standards based on the demands of both the ILS and the user experience.

MARC and Patron Data

BiblioCommons' requirements for MARC mapping reflect typical cataloguing practice:

- Use of AACR2 or RDA and MARC21 standards for Bibliographic and Authority data;
- Authority and Bibliographic records must be exportable separately with corresponding links between the two.

Subscriber will complete a survey describing a set of rules that can be used across all bib records to isolate key data for mapping into BiblioCommons schemas, including for example and without limitation:

- Format values (e.g., DVD, Braille book)
- Audience values: Adult, Teen, Children
- Fiction/Non-fiction/Other

BiblioCommons will only support character sets and character-set encoding practices typical in library environments.

BiblioCommons reserves the right not to support nonstandard library data practices and practices that require custom parsing of data.

Identifiers and Other Required Fields

- Library records must have persistent identifiers over time. For example, record numbers must persist for any batch delete and re-add process of the same set of records.
- All key elements such as patron identification, bibliographic record identification and item identification must have a unique permanent identifier
 - For example, if a patron loses their library card, their barcode may change, but the new barcode must reference the same unique permanent identifier.
 - Universal identifiers should be in place for all bibliographic records where practically possible.
- Patron records must have a birth date field, though not necessarily birth data.

CATALOGUING WORKFLOWS

Subscriber should be prepared to describe acquisition and cataloguing workflows, explaining how records are added, changed and deleted in various cases (e.g., brief records created during the inter-library loan processes, records created during the acquisitions process, records that are suppressed from the online public access catalogue (OPAC), batch processes). BiblioCommons will support cataloguing practice and workflows that are typical among public libraries in North America.

Subscriber must notify BiblioCommons in advance when a larger than normal number of records is added, edited, or deleted from their ILS.

IF SUBSCRIBER DOES NOT MEET THE REQUIRED CONDITIONS

BiblioCommons will show flexibility in the requirements detailed in this Schedule "D" if mutually agreeable alternatives are found. But in the absence of such alternatives and where Subscriber fails to meet materially any of the requirements, Subscriber will a) use its own resources to perform the work necessary to conform to the requirements or to specifications applied by BiblioCommons in libraries of similar size and with the same or similar ILS deployment, or b) hire

BiblioCommons at a rate of \$1500 per day per technician to develop a reasonable solution that will be specified and estimated in advance by BiblioCommons.

For Local Connector only: In the event that Subscriber does not provide 24-hour, 7 day-a-week remote desktop access to the server running Tomcat, Subscriber will pay to BiblioCommons an additional annual fee of ten thousand dollars (\$10,000).

SCHEDULE “E” PRIVACY STATEMENT

A link to the Privacy Statement will appear to all Authorized Patrons or users registering with BiblioCommons during the registration process, and will appear on all main pages of the Service. The following Privacy Statement was in effect November 2020 and may be amended by BiblioCommons from time to time.

PUBLIC LIBRARY has entered into an agreement with BiblioCommons to provide online services that make it easier to find, discover and use collections, services and programs at the library. In addition, you may also choose to use this service to share ratings and commentary about the titles you find at *PUBLIC LIBRARY*, and to connect with other library users. When you use *PUBLIC LIBRARY* services that say “Powered by BiblioCommons” at the bottom of the page, you are using what is referred to in this document as the “BiblioCommons Service,” and any information that is collected or shared here will be governed by this Privacy Statement.

BiblioCommons believes that effective privacy controls are the cornerstone of open and engaged communities. We have implemented the standards described on this page to protect the privacy of all users, at the same time providing the opportunity to share information about books, movies and music for those who are interested. By using the BiblioCommons Service, you agree to the terms of this BiblioCommons Privacy Statement and the [BiblioCommons Terms of Use](#). The BiblioCommons Privacy Statement and BiblioCommons Terms of Use can be accessed anytime through the links at the bottom of each page that is powered by BiblioCommons; together they are the only documents that govern your relationship with BiblioCommons.

Is this the only policy governing the use of my information on services offered by the library?

No. Information you provide on the BiblioCommons Service may be transmitted to your library and its designated service partners, where it will be handled according to the policies your library has implemented in those environments. Please check the library’s website to view these documents, or speak to a librarian.

What types of information are collected on this service?

Several types of information may be collected and stored on the BiblioCommons Service:

- Personal information
- Borrowing information
- Shared content
- Feedback and Suggestions
- Non-Identifying information

You will find a description of how this information is handled in the sections that follow.

Personal Information

What personal information is gathered?

BiblioCommons gathers personal information that you provide or choose to import from *PUBLIC LIBRARY*. If you register for the BiblioCommons Service, your library barcode, PIN and borrower ID, name, birth month and year, and email address are automatically loaded into your on-line account from your library record. If some of this information is not available in your record you may be asked to provide it.

How is my personal information used?

We use your personal information to create an online account in your name, provide the services that you have requested, monitor and improve the service, keep your library record up to date, and customize content. We may store some of this information in a secure third-party data repository. We do not share your information or activity with ad networks or other entities that are not directly involved in the services you choose to use.

If you choose to share information or opinions about books, movies, music, and other topics, participate in online conversations, or create selections using Lists or My Shelves (“Shared Content”), information such as the username or name you have chosen to display, your library affiliation(s) and age group may accompany your Shared Content and appear on a profile page that summarizes your Shared Content. If you would like to change your username or modify the information that is made publicly available in connection with these features, please visit your [Settings](#).

BiblioCommons may disclose your personal information and any content associated with your account if required to do so by law or in a good faith belief that such disclosure is reasonably necessary to: (a) satisfy any applicable law, regulation, legal process or enforceable governmental request, or (b) enforce the Terms of Use, including investigation of potential violations hereof.

Is my personal information protected?

Information in your BiblioCommons account that personally identifies you is encrypted during transmission and storage. This information will be used by BiblioCommons and *PUBLIC LIBRARY* to deliver the services you request in accordance with this Privacy Statement. BiblioCommons will not share, gift, sell, rent or trade your personal information (e.g. your email address or month and year of birth). But we may display Shared Content (defined below) in the BiblioCommons Service, or make other commercial uses of Shared Content.

Law Enforcement Requests

BiblioCommons does not share information in response to law enforcement requests unless it is presented with a warrant or other legal compulsion.

Can I change or delete my personal information?

You may alter or delete any of the personal information in your BiblioCommons account except for your name, birth information and your library card number(s); please contact your library staff to make changes to these. If your personal information is updated either through the BiblioCommons Service or directly on your *PUBLIC LIBRARY* account with the help of library staff, we will synchronize the new information in both locations.

At any time, you may request to have your BiblioCommons account deleted without impacting your account with *PUBLIC LIBRARY*. To have your BiblioCommons account deleted, please contact your library. Note that while your BiblioCommons account information will not be available after deletion, some of that information may persist on memory discs

Do I have to provide contact information?

No, you do not need to provide contact information to use the BiblioCommons Service. However you may choose to do so in order to receive notices related to your use of the library through the BiblioCommons Service. Your contact information will not be used by BiblioCommons for any other purpose without your consent, or shared with any party other than *PUBLIC LIBRARY* without your direction to do so. We encourage you to check *PUBLIC LIBRARY*'s policies to understand the other ways in which your contact information may be used by *PUBLIC LIBRARY*.

BiblioCommons may send email or display messages on the service that provide you with the choice to take advantage of new features and functionality based on your past activity and stated preferences. To change your preferences for system messaging, please go to [My Settings](#).

What measures are in place to protect children?

Parts of the BiblioCommons Service are open to children under the age of thirteen. However additional measures have been taken to protect their privacy and safety. Patrons under the age of thirteen (13) years (“minors”) will be restricted from using the BiblioCommons Service to enter free text; however provision may be made for a more permissive service for minors with parental consent. While the Terms of Use prohibits the use of the BiblioCommons Service to arrange meetings with minors, children should be advised never to arrange meetings with strangers over the Internet.

User-generated content may not be appropriate for children. The BiblioCommons Service contains functionality that will enable you to collapse user-generated content that has been flagged by Users who feel the content may be offensive to some users. Enabling this functionality will help decrease the likelihood of children encountering objectionable material when using the BiblioCommons Service.

Where can I learn more about internet safety for users under the age of 18?

We recommend that parents and guardians discuss internet privacy and safety with their children. When using the internet, children should be advised:

- never to give out personal information such as their real name, phone number, email address, or school without first consulting their parents or guardians, and
- never to arrange a meeting with someone they met online.

More information about children’s safety online can be found on the following sites.

Safety tips for children:

- <http://kidshealth.org/en/kids/internet-safety.html>
- http://www.safesurfingkids.com/tips_for_kids.htm

Tips for parents:

- <http://www.google.com/familysafety/advice.html>
- <http://www.internetsafety101.org/safety101.htm>

How can parents and guardians oversee the personal information of their children?

Guardians of underage users in the US may make a request to review and alter the personal information collected from their children on this service, or to deactivate their child’s BiblioCommons account. The first step in gaining access to your child’s account is to make your request in person to staff at one of the library’s locations. Be prepared to show proof of your identity and of your relationship with the child. Staff will then have the information retrieved and delivered to you by mail or held for pick-up. Note that guardians cannot be given access to a child’s borrowing record.

Note that the BiblioCommons Service does not require children under the age of 13, as a condition of participation, to provide more information than is reasonably required.

Borrowing Information

Is my borrowing record tracked?

No. Lists of your current loans, due dates, outstanding fines, etc. may be loaded from your library record during your sessions online, but this information is not stored on your BiblioCommons account, and it is never shared with other users. You may choose to create a record of your recently-borrowed titles if this service is supported by your library; information

about recently borrowed items is never made available to the public unless you choose to enter specific titles on your shelves or in other Shared Content. If you do not choose to enable the recently-borrowed feature, no automatic record of your borrowing will be created.

Shared Content

What is Shared Content?

You may use the BiblioCommons Service to record information or opinions about books, movies, music, and other topics, participate in online conversations, or create selections using Lists or My Shelves; all of this content is called “Shared Content”. Shared Content may be useful for your own reference and can help other users find resources and information.

When you contribute content to an individual title, that title is automatically added to My Shelves, a collection that gathers all of the titles to which you have contributed content or chosen to add to your shelves. You may also create Shared Content by interacting with others through messaging, forums, or collaborative guides.

Can Shared Content be viewed by the public?

Shared Content has been designed for sharing, and is usually public. However you may make portions of your Shared Content private by using your [Privacy Settings](#). In addition, messages sent directly to other users through the service are not publically viewable.

If you are uncomfortable with the idea of sharing content with others, you may decide not to use My Shelves or contribute ratings, comments, guides, or other types of Shared Content. You do not need to create Shared Content in order to use the BiblioCommons Service.

Will my name be visible with my Shared Content?

Content and messages that you leave in public view or send to other users will be accompanied by the username that you create, or by whatever display name that you choose at a later date in your account settings. This display name is also linked to your profile page, which includes links to your Shelves, your shared Lists, and any other profile information you choose to display.

Can I change my Shared Content?

Shared Content that is not interactive may be edited or deleted on this service at any time. Deleted content is removed from our data bases and inaccessible to other users, but may remain in our data back-up system and in third-party search indexes like Google. Shared Content that is not deleted may remain available on the BiblioCommons Service indefinitely, even if you have closed your library account.

Messages and chat cannot be deleted or edited once they have been sent. They are logged and archived indefinitely. In the event of complaints regarding violations of the BiblioCommons Terms of Use, this type of information may be used by BiblioCommons to investigate.

Interactive Shared Content that other users may respond or contribute to, such as discussions, may be visible to others indefinitely in association with your display name, and may persist after your BiblioCommons account is terminated.

Other Information

Feedback and Suggestions

When you submit feedback or suggestions they will not be considered confidential and may be stored with your name and email address for analysis and follow-up.

Non-Identifying Information

BiblioCommons also records anonymous information and activity in order to improve the quality and scope of the features and content you access through the BiblioCommons Service. For example:

Information such as your browser type or anonymized IP address may be used to help us understand how visitors use the service over time and how it might be improved.

Data from your account may also be aggregated in an anonymous way.

Anonymous search logs are analyzed to improve the search algorithms.

Activity such as borrowing and reading may be aggregated anonymously to guide the development of the library's collections or to allow publishers to understand how their titles are being used.

Non-identifying information may be stored in a secure online service such as Google Analytics for use by BiblioCommons or your library. You can opt out of recording your non-identifying site-activity data on Google Analytics by installing the [Google Analytics opt-out browser add-on](#). The add-on prevents the Google Analytics JavaScript (gtag.js, ga.js, analytics.js, and dc.js) that is running on websites from sharing information with Google Analytics about visit activity.

Cookies

Cookies are small files used to enhance the functionality of websites.

BiblioCommons may set and access temporary session cookies on your computer in order to make our system easier for you to use. In addition, a more persistent cookie is used to store your user preferences. These files do not contain or transfer any personally-identifiable information. You may also choose on the log-in page to save your username in a cookie by checking "remember me." If you wish to be notified when you receive a cookie, you may set your browser to do so.

External Sites

The Internet is a big place: take care to guard your personally identifying information. This website may link to other websites that collect personal information. We recommend that you review the privacy policies of these sites before providing them with any personal data.

Changes to this Privacy Statement

This privacy statement may change from time to time in response to new laws, or to an evolution in BiblioCommons policies or practices. We encourage you to check this privacy statement from time to time for changes. Your continued use of BiblioCommons after a change will signify your acceptance of the new terms.

Change of Service

In the event that *PUBLIC LIBRARY* discontinues its participation in the BiblioCommons Service, the *PUBLIC LIBRARY* may transfer your information to a new service of a similar nature. In addition, *PUBLIC LIBRARY* may agree to have your information transferred to a successor entity of BiblioCommons or to any entity, which purchases substantially all of the assets related to BiblioCommons or a division of BiblioCommons.

Comments? Questions? Contact us: privacy@bibliocommons.com

Privacy Officer
BiblioCommons
119 Spadina Avenue, suite 1000
Toronto, ON M5V 2L1, Canada
tel. 1 (647) 436 6381

PUBLIC LIBRARY may have additional policies that govern other aspects of the services we offer. Please check the library's homepage to view these documents, or speak to a librarian.

SCHEDULE “F” TERMS OF USE

Acceptance of the Terms of Use is a condition of any use of the Service. In addition upon registration, which is required before an Authorized Patron may access circulation functions or contribute content, he or she must signal his or her agreement to the Terms of Use by clicking a checkbox. The following Terms of Use were in effect September 2018 and may be amended by BiblioCommons from time to time.

PUBLIC LIBRARY has entered into an agreement with BiblioCommons to provide an online service that will make it easier to track your holds and renewals and find the titles you are looking for. In addition, you may also choose to use this service to share ratings and commentary about the titles you find at *PUBLIC LIBRARY*, and to connect with other BiblioCommons users. When you use the pages in *PUBLIC LIBRARY*'s catalog that say “Powered by BiblioCommons” in the lower left-hand corner of the screen, you are using what is referred to here as the “BiblioCommons Service,” and these BiblioCommons Terms of Use apply. Your use of the BiblioCommons Service is subject to the BiblioCommons Terms of Use, and indicates that you accept these Terms of Use, which includes the [BiblioCommons Privacy Statement](#); together they are the only documents that govern your relationship with BiblioCommons. You may not use the BiblioCommons Service if you do not accept the Terms of Use; please read them carefully.

Is this the only policy governing my use of the library’s services?

No. *PUBLIC LIBRARY* may have additional policies that govern other aspects of the services we offer. Please check the library’s website to view these documents, or speak to a librarian.

REGISTRATION

Is Registration Necessary?

It is not necessary to register with the BiblioCommons Service in order to search the *PUBLIC LIBRARY* catalog. However, registration is required to use BiblioCommons for personalized services, such as managing your renewals and holds, contributing ratings and reviews, personalized recommendations, and communicating electronically with other users.

Who is Eligible to Register?

Registration for use of the BiblioCommons Service is open to all patrons of *PUBLIC LIBRARY* and other libraries affiliated with BiblioCommons (*PUBLIC LIBRARY* and other affiliated libraries are referred to herein as "Participating Libraries").

Can children use this service?

Children are welcome to register for the Service. However, we recommend that parents and guardians discuss internet privacy and safety with their children regularly. Please read the [BiblioCommons Privacy Statement](#) to find out more about the measures that have been put in place on the BiblioCommons Service to protect the privacy and security of children, and for information on protecting your child’s privacy and safety online.

Where can I find out more about the privacy policy of the BiblioCommons Service?

The privacy of your personal information is important to BiblioCommons. We have established security measures and controls to ensure that your information is only used as you wish. We encourage you to review the BiblioCommons [Privacy Statement](#), which forms a part of these Terms of Use, as well as the *PUBLIC LIBRARY* Privacy Policy.

SHARED CONTENT

What is Shared Content?

You may use the BiblioCommons Service to create “Shared Content,” which is any information, content or opinion that you post on the Service; it includes online conversations on the Service and selections you create using Lists or My Shelves. Shared Content may be useful for your own reference and can help other users find resources and information. Shared Content may include for example collections, ratings, reviews, video, or conversations with other users.

You may make portions of your Shared Content private, or you may leave it publicly available (as “Public Content”) for the benefit of yourself and other users in your library and on the World Wide Web. To learn more about the controls BiblioCommons has put in place to protect your privacy, please refer to the BiblioCommons [Privacy Statement](#), or visit your [privacy settings](#).

Who owns Shared Content?

Registered Users retain any ownership rights they have in content that they post on the BiblioCommons Service. However as described below, other users of the service, *PUBLIC LIBRARY* and BiblioCommons are granted an irrevocable, perpetual, non-exclusive license to use Shared Content.

Can other users use my Shared Content?

The sharing of content is an important objective of the BiblioCommons Service. When you contribute Shared Content that can be viewed by others, you grant a license to other users to make use of that material under an [Attribution-Noncommercial-Share Alike Creative Commons License](#). This is a license that grants others the non-commercial right to copy, distribute, display, perform the work or create derivative works on the condition that the original author is credited, and that any derivative distribution is licensed in the same way. Unless otherwise indicated, you have the right to use Shared Content contributed by others according to the same Creative Commons license.

What rights do *PUBLIC LIBRARY* and BiblioCommons have to use Shared Content?

By contributing content such as reviews and comments to the BiblioCommons Service, you are granting BiblioCommons and *PUBLIC LIBRARY* the right to use this content broadly. BiblioCommons may display Shared Content in the services that we sell to libraries or other third parties. Unless otherwise indicated, when you post Public Content, you grant, represent and warrant that you have the right to grant BiblioCommons and *PUBLIC LIBRARY* an irrevocable, perpetual, non-exclusive, transferable, royalty-free, worldwide license, with the right to sublicense, to use, copy, publicly display, reformat, translate, excerpt, perform, adapt, create derivative works from, and distribute such content with the name or username you have chosen to display.

If you do not want to give BiblioCommons and *PUBLIC LIBRARY* these rights, please do not contribute Shared Content on the BiblioCommons Service.

What are my responsibilities when I choose to post Shared Content?

You are solely responsible for the Shared Content that you post to the BiblioCommons Service, or transmit to or share with other users. Please read carefully the section in these Terms of Use entitled "Appropriate Use" to ensure that you understand the responsibilities that you incur when you post Shared Content.

BiblioCommons respects the intellectual property of others, and we ask our users to do the same. You represent and warrant that you own or otherwise control all of the rights to the content that you post; that use of the content you supply does not violate these Terms of Use and will not cause injury to any person or entity; and that you will indemnify us for all claims resulting from content you supply. BiblioCommons may, at our discretion, disable and/or terminate the BiblioCommons accounts of users who violate these Terms of Use.

What can I do if I see content that infringes on my intellectual property rights?

If you believe that your work has been copied in a way that constitutes copyright infringement, please provide BiblioCommons' copyright agent the written information specified below. Please note that this procedure is exclusively for notifying us that your copyrighted material has been infringed. BiblioCommons' copyright agent can be reached via email at copyright@bibliocommons.com, or at the above mailing address. Please provide:

- An electronic or physical signature of the person authorized to act on behalf of the owner of the copyright interest;
- A description of the copyrighted work that you claim has been infringed upon;
- A description of where the material that you claim is infringing is located on the site;
- Your address, telephone number, and e-mail address;
- A statement by you that you have a good-faith belief that the disputed use is not authorized by the copyright owner, its agent, or the law;
- A statement by you, made under penalty of perjury, that the above information in your notice is accurate and that you are the copyright owner or authorized to act on the copyright owner's behalf.

Our Address:

BiblioCommons
119 Spadina Avenue, suite 1000
Toronto, ON M5V 2L1, Canada
tel. 647 436 6381

Is Shared Content ever removed from the BiblioCommons Service for other reasons?

Some users may not wish to view all user generated content. BiblioCommons users who are logged-in have the option of blocking, "ignoring" or collapsing content from specified users on an individual basis. Ignoring a user can be reversed. The BiblioCommons Service also offers the ability to collapse user-generated content that other users have flagged as containing content that they consider offensive or otherwise inappropriate.

BiblioCommons will allow all Users to collapse user-generated content based on their individual viewing preferences. But an individual User's viewing preferences shall not affect the viewing preferences of other Users.

All posted content is subject to the Appropriate Use standards of these Terms of Use. If you see content that violates the Appropriate Use standards, you may flag the content by using the 'Report This' tool that is adjacent to all Shared Content when you are logged in.

If content is flagged by a number of different users – three at this time – it is reviewed for compliance with the Terms of Use. If such content is found to violate the Terms of Use, it may be removed from public view and an email will be sent to the User who authored the content, notifying the User of the right to appeal the initial determination. The email will notify the User that BiblioCommons has removed the flagged content, indicate the specific Terms of Use that were violated, and state the process for appealing BiblioCommons' initial determination. A User's failure to submit a written appeal in the manner described in the email notice within thirty (30) days of the date of the notice will render the decision to remove the content final.

BiblioCommons will give Users who appeal the initial determination within 30 days as provided above an opportunity to explain why the flagged content complies with the Terms of Use. BiblioCommons will review the information provided by the User in support of the appeal and shall decide, after considering that information, whether the content complies with or violates the Terms of Use. BiblioCommons shall decide an appeal within 30 days of receiving it.

If BiblioCommons determines that the flagged content does not violate the Terms of Use, it shall restore the flagged comment. If BiblioCommons determines that the flagged content violates the Terms of Use, it shall promptly notify the User of its decision not to restore the flagged content and the reason for the decision.

The BiblioCommons Service is not intended for the storage of valuable or irreplaceable data.

Appropriate Use Standards

All visitors to the BiblioCommons Service agree not to:

- access or attempt to access areas of the BiblioCommons Service in which they are not authorized;
- use or attempt to use another person's account without our authorization, or falsely state or otherwise misrepresent yourself, your age or your affiliation with any person or entity;
- solicit personal information from anyone under the age of 18, use the BiblioCommons Service to arrange a meeting with anyone under the age of 18 or solicit passwords or personally identifying information for commercial or unlawful purposes;
- disable, overburden, impair the proper performance or functionality of the BiblioCommons Service or otherwise use or attempt to use the BiblioCommons Service to organize a meeting with any individual who is under 18 years of age;
- use or access the BiblioCommons Service or related systems in a way that adversely affects the performance or function of the service;
- use any automated system to harvest or capture any BiblioCommons Content (as defined below) from the BiblioCommons Service, except as may be specifically permitted using RSS/XML feeds;
- co-brand the BiblioCommons Service or portion thereof ("co-branding" means to display a name, logo, trademark, or other means of attribution or identification of any party in a manner reasonably likely to give a user the impression that such other party has the right to display, publish, or distribute the BiblioCommons Service or BiblioCommons Content);

- "frame" the BiblioCommons Service or portion thereof so that the BiblioCommons Service or BiblioCommons Content appears in the same window with a portion of another website.

If you choose to register, you agree to:

- provide and maintain accurate, current and complete information;
- ensure that your account is used in keeping with all terms governing the use of the BiblioCommons Service, including these Terms of Use;
- maintain the security of your password and username;
- not register for more than one account.

Appropriate Use When Posting Content

Remember that the Service is used by visitors with a broad range of ages and sensibilities. You agree not to use the Service to upload, post, transmit, share, store or otherwise make available any content that:

- violates the Appropriate User Standards;
- is unrelated to the specific book, movie, music or other library material that is the subject of the post or displayed page;
- is unlawful, threatens or incites violence, physical intimidation or other unlawful action or otherwise creates a genuine risk of imminent harm or direct threat to safety;
- consists of or depicts obscene material as defined by applicable state, provincial or national law;
- constitutes unlawful multi-level marketing, such as a pyramid scheme;
- constitutes unsolicited or unauthorized advertising, solicitations, promotional materials, junk mail, spam and/or chain letters for commercial or personal gain;
- is private information about or belonging to any third party, including, without limitation, home addresses, home phone numbers, personal email addresses, personal identification numbers and credit card numbers, the disclosure of which would constitute an invasion of privacy or otherwise be prohibited under applicable law;
- contains software viruses, worms, or any other computer code, files or programs designed to interrupt, gain illegal access, destroy or limit the functionality of any data, software, hardware, or telecommunications equipment;
- infringes upon or violates the rights of any individual or entity under applicable state, provincial or national law including without limitation, intellectual property rights;
- constitutes, encourages or provides instructions for a criminal offense or that would otherwise create liability or violate any local, state, national or international law.

Warning About Content

You understand that by using the BiblioCommons Service, you may encounter content that may be considered indecent or otherwise objectionable. Consequently, you agree to use the BiblioCommons Service at your sole risk and you agree that neither BiblioCommons nor any Participating Library shall have any liability to you for any such content that may be found to be indecent or otherwise objectionable.

Neither BiblioCommons nor *PUBLIC LIBRARY* verify the accuracy, truthfulness or reliability of any information posted by users, endorse any opinions, or confirm the credentials of any users who may post information. You should always

exercise caution and not rely or act upon any information available on the BiblioCommons Service, particularly information that relates to your legal rights, financial arrangements or health.

BiblioCommons may at any time use automated translation tools to make the BiblioCommons Service or portions of it available in languages other than English. Such tools have significant limitations and only the English version of any translated content is considered the definitive version.

The BiblioCommons Service contains functionality that will enable you to collapse user-generated content that has been flagged by Users who feel the content does not conform to the Terms of Use or is otherwise inappropriate for all users. Enabling this functionality will help decrease the likelihood of encountering objectionable material when using the BiblioCommons Service.

How are feedback and suggestions managed?

BiblioCommons accepts feedback, questions, comments, ideas, concepts, or techniques for new services or products through the Service ("Suggestions"). When you submit Suggestions you agree that they will not be considered confidential, and that they may be stored with your name and email address in a database that may be located outside of your country. By submitting any Suggestions, you grant BiblioCommons an unrestricted, irrevocable, world-wide, royalty-free right to use, communicate, reproduce, publish, display, distribute and exploit such Suggestions in any manner, and you agree that we may contact you via email for clarification or additional feedback.

BIBLIOCOMMONS CONTENT

The services and content provided on BiblioCommons ("BiblioCommons Content") are comprised of 1) services and content provided by Participating Libraries, BiblioCommons and third-party providers ("Service Content"); and 2) Shared Content contributed by users. All BiblioCommons Content is protected by law, and its use is governed by the rights described below.

Can I display BiblioCommons Content on other websites?

The Service makes it possible for you to feature public BiblioCommons Content on external third party websites or applications. This is encouraged under the terms described here. Pages on any external third-party websites and applications that display BiblioCommons Content must provide a link from each extract to an original presentation of that material on a BiblioCommons webpage. We reserve the right, at any time and without notice, to object to or require the removal of any link that is misleading, or interrupts or interferes with the Service provided by BiblioCommons.

Are there any restrictions on my use of the Service Content in other environments?

BiblioCommons and *PUBLIC LIBRARY* grant our authorized users a limited, personal, non-transferable, revocable license to access and use the Service and Service Content for personal, non-commercial use. All other rights are reserved. Except as arranged by separate agreement, you may not copy, reproduce, republish, download, post, broadcast, transmit, make available to the public, or otherwise use the Service Content in any way except for your own personal, non-commercial use; nor may you disassemble, decompile, or reverse engineer the Service. The Service Content is the intellectual property of Participating Libraries, BiblioCommons, or their affiliates or their licensors, and is protected by US and international copyright law. Some elements of the Service Content are also protected by trademark law and laws related to trade dress, trade secrets, and unfair competition.

OTHER NOTICES

Overdue Notification Service

Reminder notifications are not a replacement for keeping track of your borrowing. Neither BiblioCommons nor *PUBLIC LIBRARY* take responsibility for fines that result from missed reminders. You can check your account status by visiting [My Borrowing](#).

Warning About Links to Other Sites

The BiblioCommons Service may contain links to other websites and resources that are not a part of the Service ("Linked Sites"). We provide links to Linked Sites as a convenience to the Users of the Service and such links do not imply any endorsement of the Linked Sites by us. We have no control over the content of Linked Sites. Users must be aware that the Linked Sites may also have terms of use or privacy policies that differ significantly from those of the Service. All use of Linked Sites is at your own risk.

General

You may not assign these Terms of Use or any of your interests, rights or obligations under these Terms of Use. If any provision of these Terms of Use is found to be invalid by any tribunal having competent jurisdiction, the invalidity of such provision shall not affect the validity of the remaining provisions of these Terms of Use, which shall remain in full force and effect. Any waiver of any portion of these Terms of Use or of any right or remedy of BiblioCommons must be in writing in order to be effective.

Limitation of Liability

To the extent permitted by law and to the extent that BiblioCommons or Participating Libraries are otherwise found responsible for any damages, BiblioCommons or Participating Libraries are responsible for actual damages only. To the extent permitted by law, in no event shall BiblioCommons, its affiliates, its licensors, its suppliers, participating libraries, or any third parties mentioned at the Service be liable for any incidental, indirect, exemplary, punitive or consequential damages, lost profits, or damages resulting from lost data or business interruption resulting from the use of or inability to use the Service or the Content, regardless of the theory of law upon which such claim may be based, including warranty, contract, tort, and whether or not BiblioCommons or Participating Libraries are advised of the possibility of such damages. To the extent permitted by law, the remedies stated in these Terms of Use are exclusive and are limited to those expressly provided for in these Terms of Use.

Any action or claim related to these Terms of Use or arising from your use of the Service must be brought within twelve (12) months of the existence of the alleged facts giving rise to the action or claim.

Disclaimer of Warranties

Neither BiblioCommons nor Participating Libraries make any representations with respect to the BiblioCommons Service, including any representations related to results that may be obtained by using the BiblioCommons Service. All use of the Service is at the sole risk of the user.

The BiblioCommons Service and the BiblioCommons Content are provided on an "as is" basis and BiblioCommons and Participating Libraries disclaim any and all warranties to the fullest extent permissible by law, including implied and/or statutory warranties, including but not limited to implied warranties of merchantability, non-infringement of third parties' rights, and fitness for a particular purpose. Neither BiblioCommons nor the Participating Libraries make any representations or warranties about (and specifically disclaim any responsibility for) the accuracy, completeness, security or timeliness of the BiblioCommons Service and its content. No warranties may be made in relation to the website or its contents except as contained in these Terms of Use.

You agree and acknowledge that the limitations and exclusions of liability and warranty provided in these terms of use are fair and reasonable.

Indemnity

You agree to defend, indemnify, and hold harmless BiblioCommons and the Participating Libraries (as well as their officers, directors, employees, agents, successors and assigns) from and against any third party claims, actions or demands (including, without limitation, costs, damages and reasonable legal and accounting fees) alleging or resulting from, or in connection with your use of this Service or your breach of these Terms of Use.

Your First Amendment and Other Rights

BiblioCommons has worked extensively with libraries across the United States to ensure that these Terms of Use protect your First Amendment and other rights as a library patron. These Terms of Use (including the mechanics around removing Shared Content as described above) have been created and are revisited from time to time, to ensure that they are reflective of, and otherwise protect, your First Amendment and other library patron rights. These Terms of Use should not be interpreted in any matter to lessen or remove your First Amendment rights or any other statutory rights you may have as a library patron.

Jurisdiction and Forum

Your use of the Service and these Terms of Use shall be governed by and construed in accordance with the laws of the Province of Ontario, Canada, excluding (a) its conflicts of law rules and (b) the United Nations Convention on Contracts for the International Sale of Goods (including all related protocols). Any dispute, claim or action related to your use of the Service or under these Terms of Use shall be resolved by arbitration under the Arbitration Act (Ontario) by a single arbitrator sitting in Toronto, Ontario, in the English language, and you further agree and submit to the exercise of personal jurisdiction of such arbitrator(s) for the purpose of litigating any such claim or action.

Notwithstanding any provision of this section of the Terms of Use, BiblioCommons shall be free to seek interim or injunctive relief before any court of competent jurisdiction for a breach or a threatened breach of any provision of these Terms of Use that may, in our absolute discretion, require an urgent remedy. For the purposes of the foregoing, you expressly attorn to the jurisdiction of the courts of the Province of Ontario and the Federal Court of Canada sitting in Toronto, Ontario and waive any claim or defense that such forum is not appropriate. You agree that the limitations on liability, disclaimer of warranties and indemnity provisions of this Terms of Use are for the benefit of BiblioCommons, our Participating Libraries and their successors.

Compliance with Law

You agree to use the BiblioCommons Service in strict compliance with all applicable laws and regulations. You shall take no actions which would cause BiblioCommons or Participating Libraries to be in violation of any laws, rulings or regulations applicable to BiblioCommons or Participating Libraries.

Complete Agreement

Except as expressly provided in a separate written agreement between you and BiblioCommons, these Terms of Use constitute the entire agreement between you and BiblioCommons with respect to your use of the BiblioCommons Service.

Updating these Terms of Use and the Service

The BiblioCommons service is constantly evolving in order to provide the best possible experience for our users, and our terms may change accordingly. However we will not reduce your rights under these Terms of Use without your explicit consent. We will post any changes to the Terms on this page and, if the changes are significant, we will provide a more prominent notice on the Service. Your continued use of the BiblioCommons Service signifies your acceptance of any revised Terms of Use.

Without specific notice to you, BiblioCommons may change, supplement, delete or update any portion of the Service; or establish or change, at any time, general practices and limits concerning our products and services.

Termination

You agree that BiblioCommons, in its sole discretion, may terminate or suspend your use of the BiblioCommons Service and BiblioCommons Content at any time regardless of whether the BiblioCommons Service remains accessible by others. BiblioCommons may discontinue the BiblioCommons Service at any time without liability to you. Upon termination of the license, you shall cease all use of the BiblioCommons Service.

**SCHEDULE “G”
ADDITIONAL FEES**

Additional fees may apply in certain circumstances as referenced in the Agreement. The following fees are in effect on the date hereof. Data exports will be completed after payment from Subscriber has been received and provided that Subscriber is not in material breach of any of its material obligations under this Agreement.

G.1 - Patron-Contributed Data Export Upon Termination – BiblioCore and BiblioWeb

Fee: \$2,000.00

Format: .csv format or such other format that the Parties may agree upon

Scope: Shared Content that has been submitted by Users via the BiblioCore and BiblioWeb products

G.2 - Staff-Contributed Data Export Upon Termination – BiblioWeb

Fee: \$500.00

Format: XML format (text only)

Scope: Content (text only) that is in production that has been created by Subscriber’s staff in the BiblioWeb product



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.