

**LAKE FOREST LIBRARY BOARD OF TRUSTEES**  
**Lake Forest Library, 360 East Deerpath Road, Lake Forest, IL 60045**  
**Kasian Room, Lower Level**  
**Tuesday, August 20, 2024, 6:30 pm**  
**Regular Meeting**

The Lake Forest Library provides members of the public present at the meetings with an opportunity to participate in the meeting. No prior registration is necessary. The meeting agenda and materials are available on the Library website. The meeting's minutes are available on the Library website after they are approved by the Library Board of Trustees. Current and past meeting information, including recordings, is available at: [Board Meetings & Minutes | Lake Forest Library](#)

**Agenda**

1. Welcome and Call to Order
2. Roll Call
3. President's Remarks
4. Call for Additions to the Agenda
5. Opportunity for the Public to Address the Board
6. Correspondence Report and Patron Comments
7. Consent Agenda (omnibus vote on matters 7(a) - 7(e)):
  - a. Approve August 20, 2024 Agenda
  - b. Approve July 16, 2024 Regular Meeting Minutes
  - c. Approve July 2024 Financial Report
  - d. Approve July 2024 Finance Committee Meeting Minutes
  - e. Approve July 29, 2024 Building Committee Meeting Minutes
8. Finance Committee: Investments – **Update**
9. Building Committee:
  - a. Elevator Upgrade/Modernization Request for Proposal – **ACTION**
  - b. Return Pump and Condensate Pump Replacement – **Update**
  - c. HVAC controls/building automation system – **Update**
  - d. Fence/Landscaping Matters with Neighbors – **Update**
  - e. Exterior Courtyards - **Update**
10. Library Operations Report
11. Unfinished Business
12. New Business
13. Adjournment.

**Next Meeting:**

Regular Board: Tuesday, September 17, 2024, 6.30 pm – Kasian Room

Special meetings may be called at any time with proper notice pursuant to the Library's bylaws. Individuals with disabilities who require certain accommodations in order to allow them to observe and/or participate in this meeting, or who have questions regarding the accessibility of the meetings or the facilities are requested to contact the Library Director at 847.810.4602 promptly to allow the Library to make reasonable accommodations.

## **PUBLIC COMMENT AT BOARD MEETINGS POLICY**

The Illinois Open Meetings Act provides in Section 2.06 that at meetings of public bodies, “any person shall be permitted an opportunity to address public officials under the rules established and recorded by the public body.” 5 ILCS 120/2.06(g).

The Board of Trustees welcomes public participation. This policy provides the following rules and guidelines for public participation at its meetings.

Individuals attending board meetings must conduct themselves with respect and civility toward others. Abusive, profane, threatening, or harassing language and/or personal attacks will not be permitted. The Board President or presiding officer may prohibit further comment at the meeting by a speaker whose remarks violate this rule.

Public comments are permitted during the time designated on the Board of Trustees meeting agenda, unless otherwise directed by the Board President.

The Board President determines the order in which speakers will be recognized.

When recognized by the Board President, the speaker should begin by stating his or her name and address.

Public comments will ordinarily be limited to three (3) minutes per speaker. The Board President shall have discretion to modify this time limit, as well as to limit repetitive comments.

Members of the public will not be allowed to speak a second time until all members of the public who wish to speak have been allowed to do so. The Board President will determine whether second public comments will be permitted, and if so, the appropriate amount of time for public discussion, and will end public comment at his/her discretion.

Board members are not obligated to respond to comments from the public. Issues requiring possible action by the board may be added to a future meeting agenda, and issues that can be addressed by library administration will be noted.

A copy of these guidelines will be placed next to the sign-in sheet made available to members of the public at the entrance to board meetings.

Petitions or written correspondence directed to the board shall be presented to the board by the Board President or Secretary at the next regularly scheduled board meeting.

Minutes are a summary of the board’s discussion and actions. Speaker requests to append written statements or correspondence to the minutes are not favored. Generally, written materials presented to the board will be included in the library’s files rather than in the minutes. The Board President shall have the authority to determine procedural matters regarding public participation not otherwise defined in these guidelines. *(Approved by the Library Board of Trustees January 9, 2018.)*

BELL & ANDERSON LLC

410 HUNT CLUB WAY  
LAKE GENEVA, WISCONSIN 53147-5618

LINDA L. LANDRETH  
(262) 384-3705  
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July 11, 2024

Ishwar Laxminarayan  
Executive Director  
Lake Forest Library  
360 E. Deerpath Road  
Lake Forest, IL 60045

Re: Grant from the Reed Family Foundation, Inc.

Dear Mr. Laxminarayan:

Please find enclosed a check in the amount of \$10,000 from the Reed Family Foundation, Inc. Lake Forest Library was recommended to the Reed Family Foundation, Inc. for consideration as a possible grantee by Peter S. Reed.

For tax purposes, it is important that the Reed Family Foundation, Inc. receives an acknowledgment of this grant which you should direct to my office at the above address. Please contact me if you have any questions.

Very truly yours,

BELL & ANDERSON LLC



Linda L. Landreth  
Chief Operating Officer

LLL:cjw  
Enclosure

BELL & ANDERSON LLC

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July 12, 2024

Ishwar Laxminarayan  
Executive Director  
Lake Forest Library  
360 E. Deerpath Road  
Lake Forest, IL 60045

Re: Grant from the Reed Family Foundation, Inc.

Dear Mr. Laxminarayan:

Please find enclosed a check in the amount of \$500 from the Reed Family Foundation, Inc. Lake Forest Library was recommended to the Reed Family Foundation, Inc. for consideration as a possible grantee by Helen S. Reed.

Ms. Reed does not wish to receive any personal gifts or benefits.

For tax purposes, it is important that the Reed Family Foundation, Inc. receives an acknowledgment of this grant which you should direct to my office at the above address. Please contact me if you have any questions.

Very truly yours,

BELL & ANDERSON LLC



Linda L. Landreth  
Chief Operating Officer

LLL:cjw  
Enclosure



## SELECTED PATRON COMMENTS

JULY 2024

- The summer reading program is great! My daughter who just finished Kindergarten had no interest in reading this summer until I suggested we do the program. Now she cannot stop reading!
- The Wonderbooks have been such a help to us as they learn to read.
- Patron complemented the "Around the Grounds" pamphlet. She was admiring a plant out front and the pamphlet helped her identify it!
- Patron was very thankful to John for his help in the Media Lab. She said she would never have figured out her project on her own.
- We absolutely loved the Firefly Family Theater show! We have been to each show and have loved them all!
- A visiting parent (from Argentina) of one of Lake Forest College's students came over to the library at her daughter's suggestion. She said her daughter comes here all the time to study and wanted her mom to check it out. I gave her a brief tour of the library highlighting the murals, some artwork, and the fine arts room since that was her area of interest.
- This program is so cool. I love the theme--the passport is so cool and the prizes are so good. I am very excited for this! (Program)
- That was REALLY fun--really fun. She had just the best time. (Little and Messy program)
- Kate gave a tour to the staff of the Lake Forest College Library. Comment from the Director of the Lake Forest College Library, Kim Hazlett: Hi Kate! I was literally just in the process of writing my email thank you! I'll add it on here. Thank you so much for taking the time to give us such a great tour of your lovely library! You all should be really proud of the many, many things you do and provide for the community. It was really impressive. I'm so thankful for all you do for the Lake Forest College students and I know they really appreciate it, too. If there's ever the opportunity to collaborate on anything, please let me know! Thank you for looking into the demo card, but if it's any trouble at all, please don't worry about it. Thanks again for everything! Kim
- The cartoonist was great! He kept all the children engaged. Thank you!
- Two back-to-back requests for a catalog computer terminal (OPAC) on the main level Ironically, one patron had their title wrong, so would have hit a dead end searching on their own, but we figured it out.

- My child had the most fun at the 3D printing event, she can't stop talking about it. We can't wait for the next one.
- Several positive chat comments received from attendees at the end of the virtual program "Shipwrecks: Treasures of the Great Lakes" presented on 7/23. Patrons commented that the program was really interesting and enjoyable, and the presentation was "super cool." One patron said, "Thank you so much! Our family loved your presentation!"
- When is the next storytime? We love it! This is a magical place.
- At 3 years old she LOVES the Library!
- We like the direction the Library is going! Much more of a community-welcoming feeling.
- I feel like the Lake Forest Children's Library is way better than the libraries in England (the patron is originally from Manchester, England). She was attending the Arty Party.
- Thank you so much for coming to our school. We had so much fun! Please come back soon! - Montessori School of Lake Forest
- Thank you for all the storytimes! Several parents were passing by the classrooms and loved how much fun everyone was having! - Dearhaven Child Care and Learning Center
- "Our library is just such a pleasure to come in. The people are nice and always willing to help. It's just so wonderful. I really appreciate what you people do."
- Patron smiled when coming into the Library and hearing the music (Justin Robert's Concert that was relocated to the Friend's Reading Room). Said it was so uplifting!
- My daughter volunteered at the Harry Potter Party and it was so much fun for her. She loved the activities and getting to work with the kids, I'm so grateful you asked for help! She's loved volunteering this summer and looks forward to coming back.
- This was a really wonderful (Harry Potter birthday) program. All the activities felt very thoughtful, the decorations were so fun, and your teen volunteers did a wonderful job with my kids! This is our first program at this library—we're from Highland Park—but we're definitely signing up for the newsletter to come to more. Thank you so much for doing this!
- Thank you so much for this (Harry Potter birthday) program—I know my youngest kiddo was really too young to get it, but everyone did a great job of including her and really made it feel like a whole family program, I'm so grateful. We had such a fun time, I hope you do it again.

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**LAKE FOREST LIBRARY BOARD OF TRUSTEES**

**360 East Deerpath Road, Lake Forest, IL 60045**

**Tuesday, July 16, 2024**

**Regular Meeting**

CALL TO ORDER

President Jim Clifton welcomed all and called the meeting to order on July at 6:33p.m. in the Kasian Room, Lake Forest Library.

ROLL CALL

Trustees present: Jim Clifton, JoAnn Desmond, Josh Jackson, John F. Johnson, Bob Shaw, Garth Pearson, Vince Sparrow, Heather Strong. A quorum was present.

Trustee absent: Emily Van Bel

Library Staff present: Ishwar Laxminarayan, Executive Director, Jim Lee, Facilities Manager, Heidi Krueger, Director of Patron Services, Joy Schmoll, Head of Communications, Lorie Rohrer, Head of Youth Services and Kate Buckardt, Head of Adult Services.

PRESIDENT'S REMARKS

President Clifton welcomed new trustee Garth Pearson and commented on the trustees who had be re-approved for new terms.

CALL FOR ADDITIONS TO THE AGENDA

Director Laxminarayan corrected a typographical error in the agenda.

OPPORTUNITY FOR THE PUBLIC TO ADDRESS THE BOARD

None.

CORRESPONDENCE REPORT AND PATRON COMMENTS

Director commented on some of the patron comments in the materials. He also commented on creating opportunities for public use of spaces in the library. shared that the recent plant brochure was well-received. Ms. Krueger also commented on the subject.

PRESENTATION BY TRUSTEE JOHNSON

Trustee Johnson provided information regarding the Northern Suburbs "Meet and Greet" for library directors and board members with State Senator Julie Morrison and State Representative Bob Morgan. He commented about trends and issues regarding infrastructure challenges, security, patron attendance / participation trends, and legislation. Trustee Strong asked if we needed to take steps to address any security issues, including communicating with other organizations regarding how to manage related issues. Director Laxminarayan and Mr. Lee spoke about some of their experiences in managing difficult or disruptive patrons.

APPROVAL OF THE CONSENT AGENDA

Trustee Jackson made a motion, seconded by Trustee Johnson, to approve the Consent

Agenda (omnibus vote of matters 10(a)-10(e)):

- a. Approve July 16, 2024 Agenda
- b. Approve June 18, 2024 Regular Meeting Minutes
- c. Approve June 2024 Financial Report
- d. Approve June 24, 2024 Building Committee Meeting Minutes.
- e. Approve July 1, 2024 Building Committee Meeting Minutes

The omnibus vote was approved unanimously by all Trustees in attendance.

**FINANCE COMMITTEE**

Trustee Sparrow commented that City Council approved the MOU contained in the board packet, advised that he would be meeting with Elizabeth Holleb, the Finance Director and Treasurer for the City of Lake Forest to discuss financial investments.

**BUILDING COMMITTEE**

**ELEVATOR**

Mr. Lee provided an update regarding the bid process for the elevator repairs and upgrades, and anticipates that the board will be in a position to vote on which vendor to use at the upcoming August board meeting. The project is expected to be completed by January 30, 2025.

**RETURN PUMP AND CONDENSATE PUMP REPLACEMENT**

Mr. Lee announced provided an update on the pump replacement, and noted that the project was ahead of schedule.

**HVAC CONTROLS AND BUILDING AUTOMATION**

Mr. Lee advised that the vendor has been out to the library to begin their work, including installation of sensors; he believes that the work will be completed in 4 – 6 weeks. Trustee Strong indicated that the new controls should not be tested in extreme weather conditions.

**FENCE PROJECT**

Trustee Strong commented regarding the fence project. She has met with the neighboring property owners about matters such as fence location, and placement of a walkway between the condominium buildings and the library. The next step in the process is to verify the property line. Trustee Shaw and Mr. Lee discussed issues related to the placement of the walkway between properties and related issues such as grading (raised by Trustee Shaw). Trustee Johnson asked if there has been agreement regarding where the walkway will be placed, and Trustee Strong indicated that is being discussed and they have asked an engineer to provide advice on the issue. Trustees reviewed a proposed blueprint of the issue and discussed issues related to pedestrian safety and visibility.

**EXTERIOR COURTYARDS RESTORATION PROJECT**

Trustees Strong discussed a meeting today with Wiss Janney Elstner (WJE) to start on the courtyard restoration project. She discussed how WJE would probe / assess various areas for age and/or water damage. WJE is hoping to have its report prepared by September, through which WJE will advise the Board as to a course of action and options related to the project.

### ILLINOIS PUBLIC LIBRARY ANNUAL REPORT

Director Laxminarayan discussed the IPLAR annual report and highlighted various features. He commented that one item caught his attention – safeguarding Library funds. He indicated that the Library would be seeking bids for a surety bond for \$2.5 million. Trustee Clifton and Director Laxminarayan discussed matters related to insurance.

Trustee Strong asked about who was customarily the custodian of the library's funds. Trustees Clifton, Desmond, and Sparrow discussed with Director Laxminarayan the need for insurance and/or surety bond with respect to the library's funds, including the need for the city to have insurance related to library funds the city is holding. The matter will be discussed further at the Finance Committee meeting tomorrow.

Director Laxminarayan indicated that the library is seeing increased usage, and the website traffic was reduced. Head of Communications Joy Schmoll discussed reasons why website sessions may be decreased, including Google changing algorithms and patrons using the library app, which would not necessitate a website session. She also indicated that more individuals are using artificial intelligence search results in lieu of visiting websites. Ms. Schmoll answered questions from trustees including Trustee Desmond regarding use of the website and the library app.

### OPERATIONS REPORT

Director Laxminarayan discussed highlights of the operation report materials provided in the board packet, including discussion of use of services by children and a 300% increase in use of certain services by teens. Ms. Schmoll discussed consolidation of non-book materials including Nintendo Switch consoles, headphones, and digital magnifiers. Director Laxminarayan spoke about upcoming events including lunch with the Mayors; he also reviewed the usage numbers and noted that the library is tracking well in relation to last year's numbers.

### UNFINISHED BUSINESS

Trustee Desmond indicated that the Friends of Lake Forest Library have retained Keri Walker as a consultant to help enhance and streamline their processes, and indicated that suggestions could be provided to Ms. Walker.

### NEW BUSINESS

Director Laxminarayan provided updated materials and a survey for the City's Strategic Plan and encouraged all to complete the survey provided.

Trustee Desmond made a motion, seconded by Trustee Shaw, to adjourn the meeting at 7:47pm. The motion passed unanimously.

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Joshua Jackson, Secretary *Pro Tem*  
Submitted for approval by the Board on August 20, 2024

Next Meeting August 20, 2024



## FY2025 Revenue & Expenditure Statement

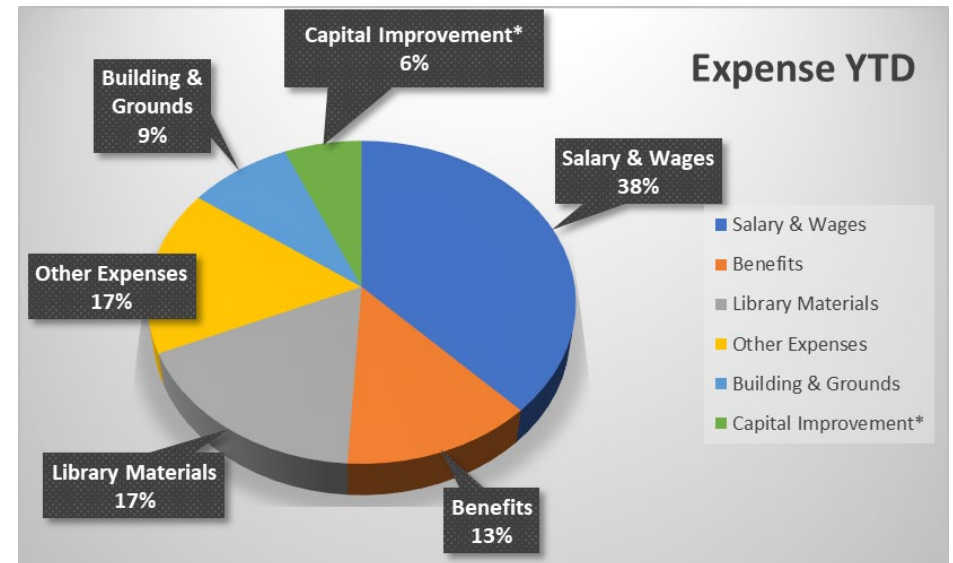
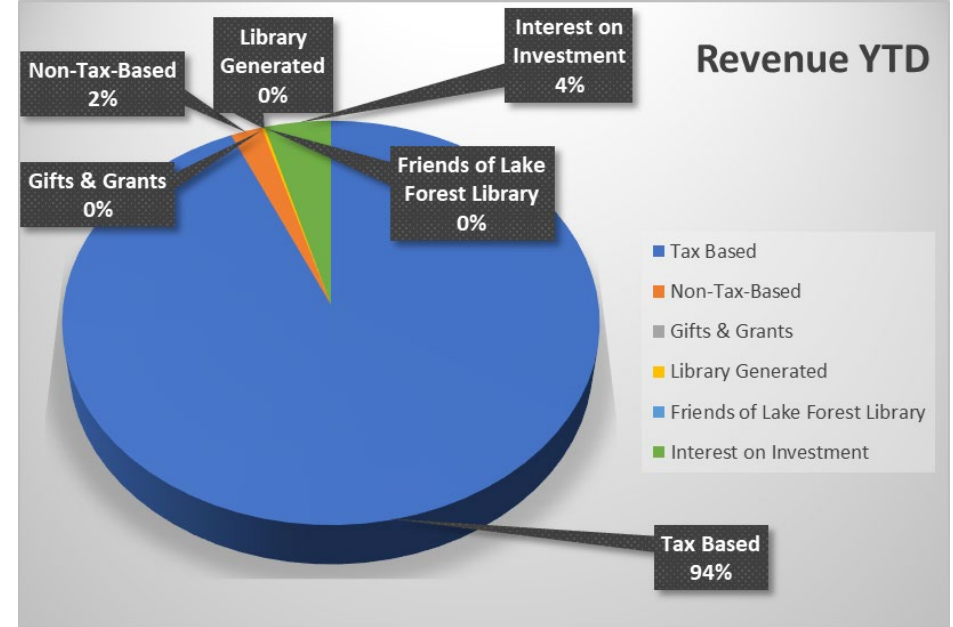
For the YTD July - 2024

Revenues	YTD	Budget	Budget Realized
Tax Based	2,605,027	4,982,581	52%
Non-Tax-Based	57,536	73,000	79%
Gifts & Grants	13	10,000	0%
Library Generated	5,662	24,000	24%
Friends of Lake Forest Library	-	79,750	0%
Interest on Investment	121,058	160,000	76%
<b>Total Revenues</b>	<b>2,789,296</b>	<b>5,329,331</b>	<b>52%</b>

Expenses	YTD	Budget	Budget Utilized
Salary & Wages	384,955	2,244,113	17%
Benefits	134,467	888,814	15%
Library Materials	178,136	722,700	25%
Other Expenses	168,853	894,580	19%
Contractual Services Library*	98,737	409,400	24%
Other*	70,117	485,180	14%
Building & Grounds	87,573	393,950	22%
Contractual Services Building*	6,568	25,000	26%
Capital Improvement*	65,397	2,100,000	3%
<b>Total Expenses</b>	<b>1,019,382</b>	<b>7,244,157</b>	<b>14%</b>

Reserves	
Reserve - Capital Improvements	3,050,000
Reserve - Technology Improvements	300,000
Capital Equipment	300,000
Fund Balance - Unassigned	3,953,524
<b>Total Reserve Amount</b>	<b>\$ 7,603,524</b>

\*Detail on Last page of the Report



# FY2025 Revenue & Expenditure Statement

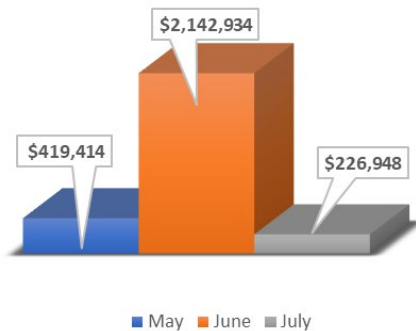
For the YTD July - 2024

	May	June	July	YTD	Budget
Tax Based	362,954	2,141,798	100,275	2,605,027	4,982,581
Non-Tax-Based	15,187	-	42,349	57,536	73,000
Gifts & Grants	13	-	-	13	10,000
Library Generated	3,696	1,136	831	5,662	24,000
Friends of Lake Forest Library	-	-	-	-	79,750
Interest on Investment	37,564	-	83,494	121,058	160,000
	\$419,414	\$2,142,934	\$226,948	\$2,789,296	\$5,329,331

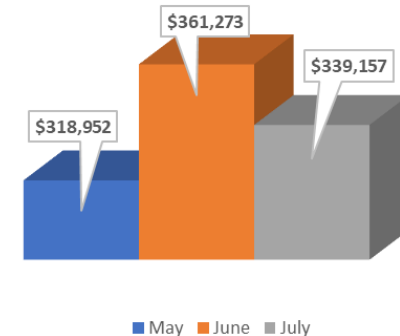
	May	June	July	YTD	Budget
Salary & Wages	94,577	144,383	145,995	384,955	2,244,113
Benefits	43,937	44,379	46,151	134,467	888,814
Library Materials	34,053	85,593	58,491	178,136	722,700
Other Expenses	69,335	37,089	62,429	168,853	894,580
Contractual Services Library	48,098	16,012	34,627	98,737	409,400
Other	21,238	21,077	27,802	70,117	485,180
Building & Grounds	55,885	8,449	23,240	87,573	393,950
Contractual Services Building	2,693	1,379	2,495	6,568	25,000
Capital Improvement	21,165	41,380	2,852	65,397	2,100,000
	\$318,952	\$361,273	\$339,157	1,019,382	7,244,157

	\$100,462	\$1,781,661	(\$112,209)	1,769,914	(\$1,914,826)
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Revenue By Month



Expense By Month



**Lake Forest Library  
Financial Notes and Variance Report  
For the Month of July 2024 (Month 03) FY2025**

**Funds on Hand:** \$3,953,524 (unrestricted/unaudited). The budget deficit of \$1,914,826 will be adjusted at the end of the fiscal year from funds on hand

**General Operations - Revenues**

**Property Tax:** As of July 31, the Library received \$2,605,027 in property tax distributions which is 52% of annual budget.

**Non-Tax-Based:** As of July 31, the Library received \$57,536 in property tax distributions which reflects personal property tax \$28,776 and per capita grant \$28,760 payment which is 79% of annual budget.

**Gifts:** As of July 31, the Library received \$13 as gifts and grants.

**Library-Generated:** As of July 31, the Library received \$5,662 in Library generated income. This income is from copiers, other revenue such as CCS and miscellaneous fees which is 24% of the annual budget.

**Interest on Investment:** As of July 31, the Library received \$121,058 on interest on investment which is 76% of the annual budget.

**General Operations - Expenditures**

**Salaries, wages, and benefits:** As of July 31, \$384,955 for salaries and wages: 17% of FY budget; \$134,467 for benefits: 15% of FY budget. \$83,873 for medical insurance 17% of FY budget; \$28,701 for SSN: 15% of FY budget; \$18,682 for IMRF: 10% of FY budget and \$3,211 for Worker's Compensation: 37% of FY budget.

**Materials: Books, AV, and Electronic Services:** As of July 31, \$178,136: 25% of FY budget, this includes payments for periodical and database subscriptions.

**Other Operating Expenditures:** As of July 31, \$168,853: 19% of FY budget. Includes \$98,737 in library contractual services, including third payment of RFID lease of \$24,041 to Bibliotheca and \$70,117 on other expense such as programs, administrative fees, office supplies, membership and miscellaneous expenses.

**Building and Grounds:** As of July 31, \$87,573 which is 22% of the FY budget. Reflects the building insurance, contracts and service calls for building maintenance, the cleaning service, elevator, repairs for HVAC, and other systems.

**Capital Improvement:** As of July 31, \$65,397: 3% of FY budget has been spent on the purchase of new servers and art pieces restored - Jackleen Leary sponsored by Friends of Lake Forest. Also includes advance payment \$34,700 to International Library Service for kiosk machine.

**Reserves**

\$3,953,524 - Operating cash reserve (fund balance-unassigned). The Library's restricted reserves are currently \$3,050,000: capital equipment (\$300,000), capital improvements (\$4,000,000 out of which \$950,000 will be transfer to the revenue), and technology (\$300,000). An estimated amount of \$774,237 reflecting excess of revenues over expenditures for FY2024 will be reflected in the operating cash reserve in upcoming months after the audit.

Year to Date FY2024: 14% of budget expenses; 52 % budget revenues.



## Account Details

### Contractual Services Library

Description	May	June	July	YTD	Budget
CCS & OCLC (Integrated Library System)	12,248	-	17,505	29,753	\$ 92,400
HR Consulting	-	-		-	\$ 50,000
LAN, WAV, and Support (MSP)	9,548	9,908	9,936	29,392	\$132,000
EZ Proxy & Collection HQ	732	-	1,375	2,107	\$ 10,000
Bibliotheca	24,041	-		24,041	\$ 25,000
Online/Internet (fiber)	-	1,322	1,439	2,762	\$ 25,000
Other: Web Calendar Subscription	-	3,094	2,685	5,779	\$ 40,000
Technology Leased & Warranty Renewals	1,528	1,687	1,687	4,903	\$ 35,000
<b>Total</b>	<b>\$ 48,098</b>	<b>\$ 16,012</b>	<b>\$ 34,627</b>	<b>\$ 98,737</b>	<b>\$409,400</b>

### Contractual Service Building

Description	May	June	July	YTD	Budget
Water Treatment	250	250	250	\$ 750	
Alarm System	2,340	-		\$ 2,340	
Inner Security System	104	-		\$ 104	
Rose Pest	-	97	204	\$ 301	
AED (CINTAS)	-	1,032	2,041	\$ 3,074	
<b>Total</b>	<b>\$ 2,693</b>	<b>\$1,379</b>	<b>\$2,495</b>	<b>\$ 6,568</b>	<b>\$ 25,000</b>

**Others**

Description	May	June	July	YTD	Budget
NEW STRATEGIC INITIATIVES	-	-	-	-	\$ 100,000
ADMINISTRATIVE SERVICES	2,312	-	4,625	6,937	\$ 30,385
PERSONNEL RECRUITMENT	-	-	59	59	\$ 1,000
TRAINING & DEVELOPMENT	777	1,041	2,475	4,293	\$ 23,000
EMPLOYEE TUITION	-	-	-	-	\$ 10,000
MEMBERSHIP DUES	1,410	154	162	1,726	\$ 11,000
MEETINGS & EXPENSE REIMB	-	-	46	46	\$ 2,500
LEGAL	-	2,385	4,380	6,765	\$ 100,000
AUDITING SERVICES	-	-	-	-	\$ 9,000
PROGRAMS & SERVICES	15,371	8,674	12,917	36,962	\$ 152,400
ONLINE BANKING FEES	150	187	184	521	\$ 1,815
INSURANCE - LIABILITY	-	6,798	-	6,798	\$ 9,680
TELEPHONE	41	738	553	1,333	\$ 8,750
OFFICE SUPPLIES	68	229	2,075	2,371	\$ 15,000
POSTAGE	973	5	18	997	\$ 7,150
VENDING BEVERAGES	135	866	308	1,309	\$ 3,500
<b>Total</b>	<b>\$ 21,238</b>	<b>\$ 21,077</b>	<b>\$ 27,802</b>	<b>\$ 70,117</b>	<b>\$ 485,180</b>

**Capital Improvement**

Description	May	June	July	YTD	Budget
Capital Equipment	-	676		\$ 676	\$ 350,000
Technology Upgrade	18,815	6,005	1,782	\$26,602	\$ 250,000
Capital Improvement	2,350	34,700	1,070	\$38,120	\$1,500,000
<b>Total</b>	<b>\$21,165</b>	<b>\$41,380</b>	<b>\$2,852</b>	<b>\$65,398</b>	<b>\$2,100,000</b>

## **LAKE FOREST LIBRARY BOARD OF TRUSTEES**

### **Finance Committee Meeting July 17, 2024**

#### **Minutes**

Attendees: Trustees Vince Sparrow (Chair), Trustee John Johnson, Trustee Garth Pearson

City and Library staff: Elizabeth Holleb, Director of Finance, City of Lake Forest, Ishwar Laxminarayan, Executive Director, Library

Finance Committee Chair Vince Sparrow called the meeting to order at 5.00 pm in the Reed Room. There was no public comment. Attendees commended the City for receiving the Government Finance Officers Association's award for outstanding financial reporting for the 45<sup>th</sup> straight year.

Chair Sparrow provided background information on the Memorandum of Understanding that was recently approved by the Library's Board of Trustees and Lake Forest City Council. Given the anticipated reduction of interest rates by the Federal Reserve, the City and the Library plan to work collaboratively to strategically invest reserve funds to optimize the rate of return, while emphasizing liquidity and safety. Trustee Pearson asked why a Memorandum of Understanding was needed with the City. Director Holleb explained that the Library is a distinct legal entity with its own governing board of trustees appointed by the City Council. She noted that the library did not have the authority to levy taxes or assume debt which the City did. Director Holleb also highlighted the excellent working relationship between the City and the Library that has promoted efficiencies and optimized use of tax payer dollars.

Currently, all the Library's cash balances are held at the Wintrust Bank which are collateralized at 110%. Over the past two years, the Library and the City have benefited from higher rates of return on these investments that are currently earning 5.3%. The City has enjoyed an excellent working relationship with Wintrust Bank and these investments are completely safe and liquid. There is also \$293,512 in the Illinois Funds, a government investment pool where all deposits from the state to local entities are deposited. That is currently earning an interest rate of 5.4%. There is a wider range of investment options with the Illinois Funds government pool. However, investments are not FDIC insured or collateralized. It historically has trailed the wider market in adjusting to lower rates of interest on investments.

With the widely anticipated reduction of interest rates by the Federal Reserve, both the City and the Library are likely to see declines in investment income in the coming years. The City has already begun the process of moving some of its investments from Wintrust to Certificates of Deposits and U.S. Treasuries. Director Holleb noted that the Library receives nearly 95% of its tax revenue by September of each year. Barring any unforeseen circumstances, the Library is expected to have about \$6 million in its cash balances by the end of the current fiscal year 2025. While the Library has budgeted to draw down \$2 million in FY 2025 to pay for capital improvements, it is likely that these funds may not be needed until late in the fiscal year. Attendees also discussed working with the Library Foundation to raise additional funds to enhance the Library's capital reserves for major projects.

Several options were explored to invest the reserve funds. These included Certificates of Deposit, U.S. Treasury Bills, the Illinois Funds and retaining some assets with Wintrust. Director Holleb provided a demonstration of the EConnect Direct platform and highlighted the various options available that could change from day to day. Participants acknowledged that the Federal Reserve is likely to reduce rates gradually over a period of time and that there is a possibility that the library might earn a lower rate of return if it decides to move some of its investments in the short term. Attendees were unanimous that the Library should proactively and strategically invest its reserve funds in a manner that emphasizes safety (FDIC insured), liquidity and return on investment.

Under the terms of the Memorandum of Understanding, the Library's Board of Trustees has adopted the City of Lake Forest's investment policy and has designated the Library's Executive Director to work with the City's Finance Director to recommend investments up to a maximum cap of \$4 million under the overall direction of the Library's Finance Committee. The Library has the option to invest assets beyond this cap in the existing Wintrust or Illinois Funds accounts. After reviewing the pros and cons of different investment vehicles and investment periods, the Committee agreed on the following decisions for the first round of investments.

- \$1 million to be invested in varying maturities and amounts up to 5 years
- \$3 million to be invested in varying maturities and amounts between 6 months – 3 years.

Directors Holleb and Laxminarayan will meet shortly to identify specific investments for approval by the Finance Committee.

Ishwar provided an update on the hiring of the new Business Manager Leotrim Hamza who will start at the Library on Monday, July 29.

There was discussion about the requirement for a surety bond or certificate of insurance to be attached to the Library's annual report to the State. Director Holleb confirmed that, in her role as the City's Finance Director, her bond was covered by the Intergovernmental Risk Management Agency (IRMA) which extended to the Library since the city collects and manages all the library's finances. She will follow up with IRMA to provide the necessary documentation to the Library to forward to the state. There would be no additional cost to add the library.

Director Holleb offered to research the possibility of setting up an investment trust as is done by the Cemetery Board and the Police and Fire Pensions boards that allows them to use an investment manager to pursue more investment opportunities.

Ishwar expressed his appreciation for the cooperation and partnership that the City's Finance department has always provided to the Library.

The Finance Committee will meet next on Wednesday, August 21 at 5 pm. Topics include an update on the initial investments made and identifying investment possibilities in the Wintrust account and the Illinois Funds pool.

Trustee Johnson moved to adjourn the meeting at 6.40 pm.

## **LAKE FOREST LIBRARY BOARD OF TRUSTEES**

### **Facilities Committee Meeting July 29, 2024**

#### **Minutes**

Attendees: Trustees Heather Strong and Robert Shaw

City and Library staff: Cathy Czerniak, Director of Community Development, Ishwar Laxminarayan, Executive Director, Library, Jim Lee, Facilities Manager, Library

Others: Todd Altounian (developer), and Eric from Superior Fencing

Parties met to review the plans for the fence between the Library and the condominium development to the north and the proposed public pedestrian walkway connecting the two properties. Meeting started in the affected corner of the library's parking lot. Rain started and we went and stood on the library's loading dock.

The City said the sidewalk needs to be where drawn. That would mean the library would lose a parking space. Trustee Strong stated it is impossible for the library to comment at this time until we've consulted with a civil engineer.

An agreement was made so as not to hold up the construction of the fence. Bleck engineering is going to come stake the property line. The City will issue a fence permit to the developer after Bleck stakes the property line and the City inspector has approved it. Trustee Strong suggested the library also hire a surveyor to locate the pins. But after the pins are in and the library has verified, the developer can install the fence with a permanent (but could be removed at a future date) matching panel at the spot where the sidewalk might be after the library feels comfortable with pedestrians in that zone.

Trustee Strong said there is a possibility that the library might not want to open our site to the north ever for whatever reason and that the City and developer's team would have to accept all future liability because the library never approved and was never consulted about the opening. Ms. Czerniak responded that representatives of the library were present during the public hearings when the proposed public pedestrian walkway between the two properties was discussed.

The walk around portion of the meeting ended and Mr. Altounian, Ms. Czerniak and Eric left the meeting at 12 pm.

Trustees and staff then discussed the merits of hiring an independent surveyor and engineer to review traffic flow and pedestrian concerns. They noted how the Bleck drawing package is difficult at best to understand the whole picture of what is happening on the condo site and what if any impact to the library's site it has or can have. Trustee Strong also requested that the building committee meet with City Manager Jason Wicha.

Meeting concluded at 12.30 pm.



**Lake Forest Library  
Investment Report  
as of July 31, 2024**

**CASH AND INVESTMENTS**

<u>Account</u>	<u>Description</u>	<u>Balance</u>	<u>Rate</u>	<u>% of Total</u>
101.01-00	OPERATING CASH	8,125,960.67	5.56%	79.93%
101.02-00	PETTY CASH	350.00	N/A	0.00%
101.05-00	ILLINOIS FUNDS	810,460.95	5.38%	7.97%
151.02-00	INVESTMENTS - MULTIBANK SECURITIES	1,230,000.00	See Below	12.10%
		<u>10,166,771.62</u>		<u>100.00%</u>

**INVESTMENTS - MULTIBANK SECURITIES**

<u>Type</u>	<u>Purchase</u>	<u>Maturity</u>	<u>Principal</u>	<u>Rate</u>	<u>Accrued Int.</u>
CD	7/26/24	1/26/26	249,000.00	4.75%	\$194.42
CD	7/30/24	1/30/26	244,000.00	4.85%	\$64.84
CD	7/30/24	7/30/26	249,000.00	4.55%	\$62.08
CD	7/30/24	7/30/26	244,000.00	4.55%	\$60.83
CD	7/24/24	7/24/29	244,000.00	4.30%	\$229.96
			<u>\$1,230,000.00</u>		<u>\$612.13</u>

**BENCHMARKS**

		<u>Rate</u>	<u>As of:</u>
Liquidity	IMET Convenience Fund Rate 30 day Yield	5.11%	7/31/2024
Liquidity	90-day Treasury Bill Rate (US Treasury)	5.41%	7/31/2024
Liquidity	S&P Government Investment Pool - 30-day net yield	5.29%	7/26/2024
Core	IMET 1-3 Year Fund One Year Net Total Return	7.01%	8/15/2024
Core	3-Year Treasury Rate (US Treasury)	4.10%	7/31/2024

**From:** [Holleb,Elizabeth](#)  
**To:** [Ishwar Laxminarayan](#)  
**Subject:** RE: Investments  
**Date:** Wednesday, August 14, 2024 7:49:01 AM  
**Attachments:** [image001.png](#)

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**CAUTION: Think Security!** This email is not from someone at Lake Forest Library. **Do not click any links or open any attachments you are not expecting.**

No, I'm not. Rates are down, anticipating a more likely fed rate reduction. Checking in this morning, rates are roughly:

	US Treasury	CDs
6-month	4.945%	4.6%
1 year	4.420%	4.54%
2 year	3.960%	4.068%
3 year	3.775%	4.035%

July 31 interest rates were 5.56% for LFBT and 5.382% for IL Funds, still close but LFBT slightly higher for July.

I should have a July 31 investment report to you by the end of the week.

Thanks, Elizabeth

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**From:** Ishwar Laxminarayan <[ishwar@lakeforestlibrary.org](mailto:ishwar@lakeforestlibrary.org)>  
**Sent:** Tuesday, August 13, 2024 4:52 PM  
**To:** Holleb,Elizabeth <[HollebE@cityoflakeforest.com](mailto:HollebE@cityoflakeforest.com)>  
**Subject:** Investments

**CAUTION:** This email originated from outside the organization. Verify the legitimacy of the email with the sender before clicking links or opening attachments from unexpected sources.

Hi Elizabeth. Are you seeing anything interesting in your dashboard?

*Ishwar*

Ishwar Laxminarayan  
Executive Director  
Lake Forest Library  
360 E Deerpath Road  
Lake Forest, IL 60045  
(847) 810 4602  
[www.lakeforestlibrary.org](http://www.lakeforestlibrary.org)

[Lake Forest Library](#): *inspiration, ideas, community*





# Schindler Modernization Proposal

Lake Forest Library



**Schindler**

Modernization

8/2/2024

Lake Forest Library  
360 E Deerpath Rd

Lake Forest, IL 60045-2252

RE: Elevator Modernization Proposal  
Lake Forest Library  
Lake Forest, IL 60045-2252  
Proposal KHIL-D27H22

Dear Customer

Schindler Elevator Corporation is very grateful for the opportunity to provide you with our proposal to modernize the elevator system at Lake Forest Library. Schindler is an industry leader in vertical transportation systems with 140 years of experience and over 60,000 employees globally. As our customer, you can be certain the new elevator system will incorporate state of the art technology with the support and expertise to ensure reliable and safe operation for the life of your elevator equipment.

Schindler is proud to be the worldwide leader in escalators and the second largest installer of elevators globally. We move over one billion people per day on Schindler elevators and escalators. We are proposing Schindler's Elevator system for your property. This system's benefits are detailed in the following proposal.

Safety is the top priority for Schindler in everything we do. You can be assured Schindler provides products that meet the most stringent safety requirements in the industry. Our employee and public safety programs are of utmost importance and are non-negotiable items for each and every Schindler employee.

Our sustainability over the past 140 years is a result of our commitment to customer service, innovation and service excellence. Schindler Ahead, our predictive analytics platform, which is now available with each Schindler controller, is our continued commitment to leadership in innovation and customer service.

We thank you, again, for this opportunity and we look forward to discussing our proposal with you at your earliest convenience. You can reach me on my phone at .

Best regards,

Mary Vitt  
Schindler Elevator Corporation  
500 Park Boulevard  
Suite 750  
Itasca, IL 60143



**Schindler**

**Project Scope – Bank A**

Number of Units	1	Capacity	2500
Type	HX	Speed	150
Unit Numbers	01	# of stops	4
Jack Type	Borehole	# of openings	3 Front 1 Rear

	Description of Work	Type	Option
	<b>Machine Room</b>		
1	Control and Power Unit (Control, Power Unit, HX Controller + Power Unit Valve, Pump, Pump Motor, Muffler, HFI, CFI, Hush Kit)		New
5	Schindler Ahead		New
	<b>Governor</b>		
18	Building Emergency Power Interface		NA
19	Battery Lowering		New
20	Code Blue		NA
21	Oil Cooling Unit		NA
22	Oil Feed Line		Reuse
24	Tank Heater		Reuse
26	Rupture Valve		Reuse
28	Machine Room Wiring		New
	<b>Door Operator</b>		
31	Door Operator: Front	GAL MOVFE - 1SSO	New
32	Door Operator: Rear	GAL MOVFE - 1SSO	New
33	Clutch: Front		NA
34	Clutch: Rear		NA
35	Door Restrictors		NA
36	Door Gibs		New
37	Door Fire Tabs		New
38	Electronic Door Detector: Front	3D Door Detector (2019 Code)	New
39	Electronic Door Detector: Rear	3D Door Detector (2019 Code)	New
	<b>Hoistway Door Equipment</b>		
41	Door Tracks		Reuse
42	Door Hangers		Reuse
43	Pickup Assemblies	GAL - 1SSO / 2SSO	New
44	Spirators		NA
45	Sill Closers		Reuse
46	Door Interlocks	GAL - 1SSO / 2SSO	New
	<b>Car and Hall Fixtures</b>		
61	Code Compliant Main COP	Other - Swing	New
62	Code Compliant Aux COP		NA
63	Car PI	Other - In COP	New
64	Car Lantern	Other	New
65	Hall Lantern		NA
66	Hall Position Indication		NA
67	Access Switch	Other - Top & Bottom	New
69	Hall Pushbutton Station	Other - Surface	New
71	Fixture Finish	#4 Stainless Steel	New

Car and Hoistway			
90	Hoistway Wiring	Traveling Cable + Hoistway Wiring	New
92	Car Top Inspection Station and Work Light	HX	New
93	Car top railing	Front & Rear Opening	New
94	Cab fan		New
96	Car Door: Front	1SSO - #4SS	New
97	Car Door: Rear	1SSO - #4SS	New
103	Car roller guides		Reuse
108	Spring Buffers		Reuse
110	Car Rails		Reuse
114	Car top sheave		NA
118	Cab Interior		Reuse
120	Cab Allowance	\$0 PER CAB	NA
130	Jack Assembly		Reuse
136	Packing		Reuse

All other systems and components not noted above will be reused and integrated into the new elevator system.

### Cab Interiors Scope – Bank: A

Description of Work	Included in Proposal
Cab Interior	
New Cab Complete (installed by SEC)	NA
Cab Shell	Reuse
Ceiling / Lighting	Reuse
Emergency Light (Canopy Type)	
Cab Interior Package (installed by SEC)	Reuse
Cab Returns	Reuse
Wall Panels	Reuse
Front Car Door	New
Rear Car Door	New
Handrails	Reuse
Front Car Sill	Reuse
Rear Car Sill	Reuse
Fan	New
Emergency Exit Switch	New

## **SCHINDLER AHEAD**

**Your Schindler Modernization package comes enabled with Schindler Ahead.** The **Schindler Ahead Hardware** provides remote connectivity to your equipment and will automatically notify us if any connected component or function is operating outside established parameters. When appropriate, we will communicate with you to schedule service calls.

Monitoring will be performed 24/7 and will automatically communicate with our Customer Service Network using dedicated wireless cellular technology. Schindler will make every reasonable effort to maintain wireless connectivity.

**Schindler Ahead** has three service tiers to fit your individual needs. The tiers are Connect, Enhanced, and Premium. As part of your service agreement, Schindler includes the Enhanced Package upon completion and turnover of the last unit with details as noted herein. This cost is broken out as part of the total monthly maintenance cost of your service agreement.

**Connect** – Schindler's Connect package provides wireless cellular communication from your equipment's controller to Schindler's data network. This allows the Schindler Cube to be connected to your equipment 24/7. Connect also provides access to the basic features of ActionBoard and ActionBoard Mobile, giving you real time information on your equipment.

**Enhanced** – The Enhanced Package includes the features of Connect, plus access to Schindler's Elevated Support Professional (ESP) Team. This team analyzes information gathered by Schindler Ahead, which improves the reliability of your equipment and improves the response time. The ESP Team can alert you when a shutdown is detected, helps confirm issues remotely, and provides real-time ETAs for technicians en route. With these enhanced diagnostics, we can guarantee that you will not be charged for Running on Arrival calls. Under the "No Running on Arrival Guarantee," Schindler will fully cover the cost of any callback related to the following situations: Elevator or Escalator Running in normal operation, or running under any of the following special services modes: Independent service, Fireman's service (Phase I or Phase II), or Inspection operation. All other callbacks will be billed as outlined in the service agreement.

**Premium** – The premium package is our top tier and was created for customers requiring the most comprehensive level of service. Our premium package offers the highest level of functionality and support. The Premium tier also includes concierge level assistance for all of your service needs.

The Enhanced Package and Premium include access to **Schindler ActionBoard and ActionBoard Mobile**, which are communication technologies that provide access to real-time information about your equipment. Some of the available information includes: performance history, reports, push notifications, service call records, unit profiles and more.

Additionally, Schindler Ahead enables the option to add **Digital Alarm**, a cellular emergency phone monitoring service, to any tier. This service includes a reliable cellular connection that allows incoming and outgoing emergency calls from the elevator cab and eliminates the need for a traditional analog phoneline.

## Work by Others

The owner will provide the following requirements based on ANSI A17.1 Code, the governing code, except when applicable codes conflict with ANSI A17.1 Code. Rules referenced are ANSI A17.1 Rules.

### Hoistway

1. Provide 75-degree bevel guards on all projections, recesses or setbacks over two inches, except for the loading or unloading side. Rule 100.6.
2. Provide pit light and GFI outlet. Light switch to be located adjacent to each pit entrance.
3. Provide a legal hoistway inclusive of ventilation and shaftway bevel guards, as required.
4. Cutting and patching walls and floors.
5. Provide a pit access ladder for each elevator, where required.
6. Provide a lockable, self-closing, fire-rated pit door, where required.
7. Hoistway venting or pressurization to prevent accumulation of smoke and gas, as required by Local Building Code.

### Machine Room

1. Enclose/relocate all non-elevator oriented conduit, ducts and drains from elevator machine room, where required in the machine hoistway and/or pit. Enclosures, when used, need to be two-hour rated.
2. Provide means to regulate control room temperature and humidity between 55° F and 90° F with relative humidity no more than 85% non-condensing. Peak equipment heat release is a minimum of 6,000 BTU/Hour/Unit (maximum = 9,000 BTU/Hour/Unit) for a Hydraulic unit.
3. Provide machine room smoke/heat detector as required by regulation. In the event sprinklers are anticipated within the machine room area, means to remove primary power prior to the application of water must be provided as required by code.
4. Provide new electric wiring from the present disconnect switches to the terminals of the new elevator controllers in the new locations, inclusive of a normal/standby 120 VAC, 15 AMP supply at each controller.
5. Provide connection at the first elevator controller for fire recall operation, where auto-recall is needed to respond to a life safety/fire alarm system.
6. Provide proper lighting in the elevator machine rooms within the vicinity of every controller and mainline disconnect per code requirements.
7. Provide a fused disconnect switch or circuit breaker and a light switch adjacent to the lock jamb-side of the machine room door for each elevator location, per the National Electric Code. Rule 210.5 and NFPA No. 70 Rule 620-51. Provide auxiliary disconnects, as required, based on the elevator contractor's drawings.
8. Provide copper wire feeder and branch wiring circuits to the controller, including a main line switch and convenience outlets.
9. Provide a telephone outlet near an elevator controller in each machine room.
10. Provide a self-closing and locking access machine room door.
11. Provide an "ABC" fire extinguisher.
12. Interfacing to and updating the existing fire life safety systems to meet current code requirements.

13. A separate 20 amp circuit will be provided if tank heater is provided with the elevator.
14. Hxpress oil coolers / heaters need to be on a dedicated circuit.

### **General Requirements**

1. Provide sufficient space for storage of materials on site throughout the duration of the modernization.
2. Provide clear floor space to be used as a work area.
3. If not presently outfitted, each elevator lobby should be equipped with smoke detectors, which can be used to initiate automatic fire recall. Actuation from water flow sensing or the general building alarm may require special approval.
4. Paint new or modified hoistway equipment to match building aesthetics, as required.
5. Provide building signage and floor designations related to other building systems, as required.
6. Provide building corridor lighting sufficient for illumination of elevator landing sills, as required by code.

### **Electrical Requirements**

1. The permissible voltage drop for elevator feeders shall not exceed 3% between the service delivered to the building and our supply terminal.
2. All three legs of the three-phase feeder must be hot with respect to ground and balanced to each other with no more than a 5% variation between individual legs.
3. The maximum permissible voltage variation measured in the machine room under all operating conditions shall not exceed plus or minus 10% of the nominal building supply power source voltage.
4. A 20-amp, single phase, 110VAC, dedicated circuit with a duplex receptacle for the oil heater unit.
5. FOR EMERGENCY POWER OPERATION OF ELEVATOR(S): (when required)
  - A. Provide an emergency generator that has the same voltage characteristics as the normal power supply. It should also have the capacity to deliver sufficient power to the main line disconnect switches in the elevator machine room for operating the specified number of elevators used during an emergency at full speed and full load.
  - B. Provide an automatic transfer switch, or switches, for transferring power from normal to emergency power and back again.
6. EMERGENCY POWER OPERATION SIGNAL - The following separate indicating signals will be required from the automatic transfer switch to the machine room communication unit for each group of elevators.
  - A. One dry contact to close on emergency power and open on normal power. Provide two #12 AWG wires.



- B. Provide one normally open dry contact (pre-transfer) to close 30 to 60 seconds prior to transfer to emergency power or back to normal power. This contact should reopen immediately after actual transfer of power. This is to prevent transfer of power while an elevator is moving, which can occur during the return to normal power or on an operating test. Provide two #12 AWG wires.

Note: When operating elevators on emergency power, a means of absorbing the regenerative energy may be necessary and shall be provide by others.

It is required that the car light, the fan circuits, ascending car protection circuit and the intercom circuit (if supplied), be set to operate from the emergency power supply in accordance with the building code.

7. The SCCR rating of elevator equipment is 5000 Amps, contractor to ensure that the available fault current of the building supply at the service switch does not exceed this value (Per NEC 110.10). Contractor to include a label (please see figure 2- Available Fault Current Label Example) that identifies the Max Available Fault Current onto Disconnect.

- A. See Note 1 of Figure 2, Available Fault Current Labelling Diagram. In addition, we require a hard copy of the manufacturers Fuse Chart and rating verifying the available fault current meets requirements.
- B. Per NEC 110.24, the service switch should be legibly marked with Apparent RMS Symmetrical fault current supplying the Elevator Equipment. \*\*See note 3 of AVAILABLE FAULT CURRENT RATING LABELLING DIAGRAM.

8. NETWORK CONNECTION REQUIREMENT FOR TWO-WAY VISUAL COMMUNICATION DEVICE (A17.1-2019 / B44-19 or IBC 2018)

- A. Where the elevator rise is 18m (60 ft) or more, or seismic operation is provided according to A17.1-2016 or later requirements, a single RJ45 wired Ethernet communications circuit shall be provided by the building. This Ethernet connection shall be located in the machine room associated with the Elevator Control Visual Alarm Box for the master elevator group.
- B. Where the elevator rise is below 18m (60ft), and seismic operation is not provided according to A17.1-2016 or later requirements, separately wired RJ45 Ethernet communications circuits, one per elevator group, shall be provided by the building. This Ethernet connection shall be located in the machine room associated with each Elevator Control Visual Alarm Box.
- C. The network must have enough bandwidth for connecting to multiple elevators and displaying a series of images with adequate resolution to identify the presence and general condition of passengers in the elevator. The recommended minimum upload speed is 0.5Mb/s per elevator connected to the communication system. Note that networks are commonly rated by their download speed with a lower upload speed.
- D. The communications circuit shall originate at the Elevator Control Visual Alarm Box, part of the two-way visual communication device designed by Schindler and terminate at the building WAN internet equipment routed via a 1" conduit.
- E. This internet connection is required to have an un-interruptible power supply for a duration of 4 hours to allow for the Visual Communication Device to function if building power is lost.



From Building Electrical Distribution Panel

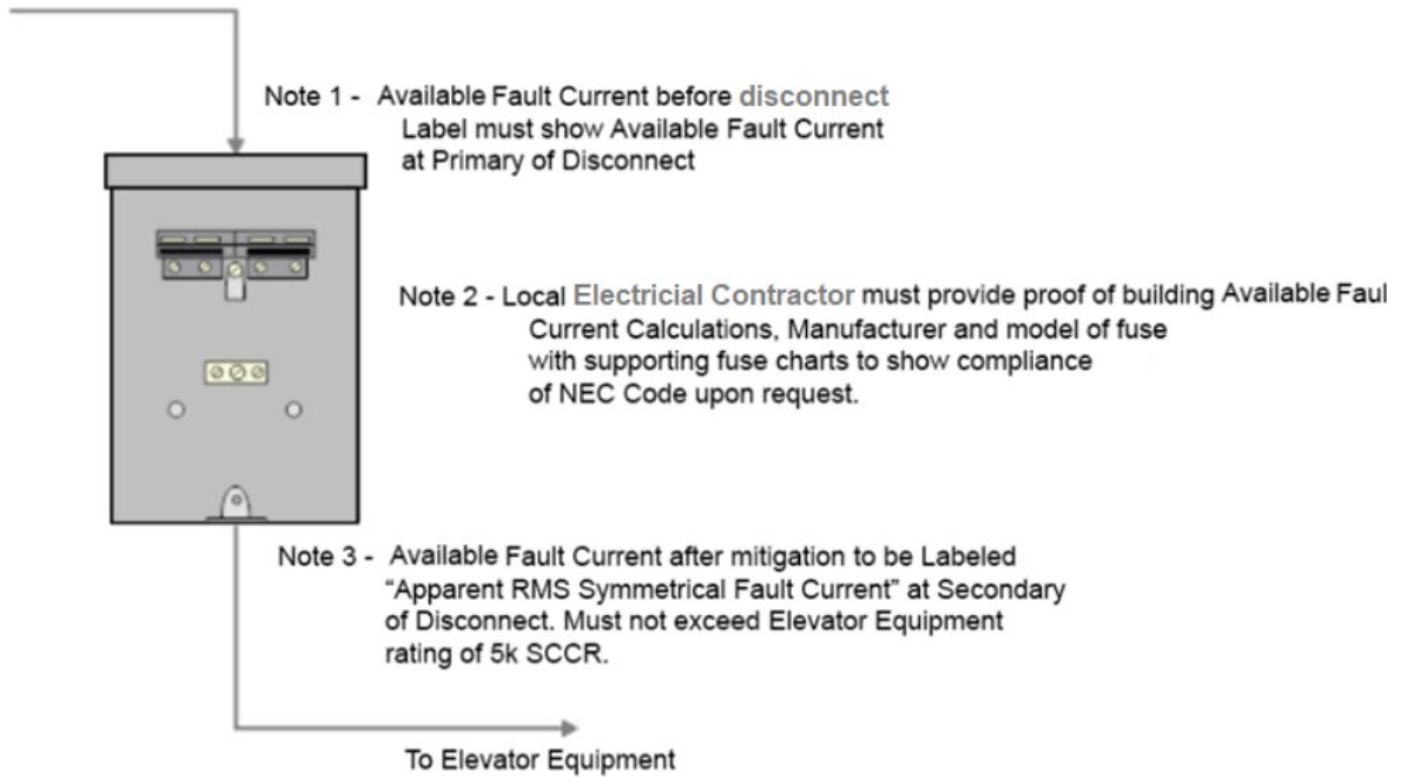


FIGURE 1: AVAILABLE FAULT CURRENT RATING LABELLING DIAGRAM

## Price and Payment Terms

1. Our price for the work proposed is as noted below including appropriate tax and will be added to the invoice/billings. This price is firm for 30 days, and thereafter subject to change without notice.

**Total Price including applicable taxes: \$164,433.00 or,  
Payment over 60 equal monthly payments: \$4,538.35\***

You agree to the following payment schedule for the lump sum option:

- Initial Invoice: 50% of the price quoted above upon execution of this Contract;
- Progress Invoice: 95% of the remaining balance to be paid in one installment upon fabrication of material;
- Final Invoice: Final payment within 30 days of completion of the work.

All invoices, including final invoice are payable within 30 days of application.

Any late or overdue payments will bear interest at the rate of 1 ½% per month. Attorneys' fees and other costs of collection will be included in the event that we must pursue legal action for payment or in the event that you are otherwise in breach of this contract.

We will not release to manufacture until the above initial invoice is paid. We will not schedule on-site work until the above progress invoice is paid. We will not turn over equipment prior to receipt of 95% of the price for the work inclusive of change notices.

- \*2. Schindler understands the costs for capital improvement can put a strain on a property's budget. Schindler has partnered with leading Finance organizations in an effort to help our clients sort through the best options to fund these capital improvements. We have simplified the process so all private financial information as well as future payments are handled between the Finance organization's representative and our client. Schindler facilitates the transaction and only requires a new 5-year maintenance contract as part of the agreement. Financing option is subject to credit check and approval.

Often times there are other building components which require upgrade due to the upgrade of the elevator system. These costs can be rolled into the total finance package with the lender.

If for some reason our contract is cancelled prior to the 60-month term all remaining balances become due immediately. \*Monthly finance payment is an approximation and will be finalized following the credit check and contract.

Your sales representative, Mary Vitt, will be happy to facilitate the process moving forward if you are interested in our financing option. The finance credit approval form can be found attached to this document.

3. Our price for the cab interiors which is included in the above price is \$0 (total for the job).

**Related Contractor Work Triggered by Modernization:  
\$86,432.00**

## General Terms and Conditions

1. The price quoted in Article 1 above is based upon all the work being performed during our regular working hours of regular working days. If overtime is required, the additional price usually charged by us shall be added to the contract price. Your advance approval in writing is required before we will schedule or perform any overtime work.
2. The equipment furnished hereunder remains personal property and we retain title thereto until final payment is made, with the right to retake possession of the same at the cost of the Purchaser if default is made in any of the payments, irrespective of the manner of attachment to the realty, the acceptance of notes, or the sale, mortgage or lease of the premises.
3. The completion of the work as covered by this Agreement or acceptance thereof shall constitute a waiver by you of all claims for loss or damage due to delay. It is also understood and agreed that we shall not be liable for the condition, design, application or compliance with acceptable codes of any equipment not furnished under this Agreement or for the omission of any work or equipment not covered by this Agreement. We reserve the right to remove and retain all equipment that has been replaced or new materials not used in construction.
4. Schindler reserves the right to furnish its most modern of equipment and no statements contained in this contract are to make it obligatory for us to furnish equipment, the design of which has been discontinued or supplanted by new standards or codes.
5. All previous communication between us, whether written or verbal, with reference to the subject matter of this Agreement, is hereby abrogated, and this contract when duly accepted and approved constitutes the agreement between us, and no modification of this agreement shall be binding upon the Purchaser or Schindler, or either of us, unless such modification shall be in writing, duly accepted by the Purchaser and approved by Schindler. The contract date shall be the date of approval by Schindler.
6. The Purchaser is to provide suitable connections from the power mains to the controller, together with any cutouts, line switches, phase reversal or lightning arresters, and any other such components as that may be necessary to meet purchaser and/ or local code requirements.
7. Any changes in the building required to meet any local or state building or electrical codes are to be made by the Purchaser. Any cutting or patching necessary for the installation of equipment furnished under this contract shall be done by the Purchaser. Schindler shall not under any circumstances be liable for any redecorating that may be necessary upon the completion of its work. No work or service other than that specifically mentioned herein is included or intended. Such work by others must be coordinated by Purchase with Schindler in order to avoid delays to Schindler's work.

- 8A. It is expressly understood, in consideration of the performance of the service enumerated herein at the price stated, that nothing in this agreement shall be construed to mean that Schindler assumes any liability on account of injury or damage to persons or property, except to the extent directly and solely due to the negligent acts or omissions of Schindler or its employees; and that the Purchaser's responsibility for injury or damage to persons or property while riding on or being in or about the equipment referred to is in no way affected by this Agreement.

Schindler shall not be responsible or liable for any loss, damage, detention or delay caused by labor trouble, strikes, lockouts, fire, explosion, theft, lightning, windstorm, earthquake, floods, storms, epidemics, pandemics, riot, civil commotion, malicious mischief, embargoes, shortages or materials or workmen, unavailability of material from usual sources, Government priorities or requests or demands of the National Defense Program, civil or military authority, war, insurrection, failure to act on the part of the Purchaser's or Schindler's suppliers, orders or instructions of any federal, state or municipal government or any department or agency thereof, Act of God, or by any cause whatsoever beyond its reasonable control. Dates for the performance or completion of work shall be extended to the extent of such delays.

- 8B. Purchaser agrees to defend, indemnify and hold Schindler harmless from and against any claims, lawsuits, demands, judgments, damages, costs and expenses arising out of this Agreement except to the extent caused by or resulting from the established sole and direct fault of Schindler.
- 8C. We reserve the right to modify price and schedule without penalty due to material or component shortages.
- 8D. We will not be liable for damages of any kind, whether in contract or in tort, or otherwise, in excess of the price of this Agreement. We will not be liable in any event for special, indirect, liquidated or consequential damages, which include but are not limited to loss of rents, revenues, profit, good will, or use of equipment or property, or business interruption.
9. Schindler guarantees that the equipment furnished hereunder will comply with the foregoing specifications and if promptly notified in writing will, at our expense, correct any defects in such equipment occurring within one year from the date of completion or acceptance whichever occurs first, which are not due to ordinary wear and tear or improper use, care or maintenance. The correction of such defects constitutes the limit of our responsibility. THERE ARE NO OTHER WARRANTIES OR GUARANTEES, EXPRESS OR IMPLIED, OTHER THAN OF TITLE. The equipment installed under this agreement requires maintenance service, such as periodic examinations, lubrication and adjustment by competent elevator mechanics. Our guarantee is not intended to supplant this normal servicing of the equipment and it is not to be construed that we will provide free maintenance service of this type, except as may be provided under other provisions of the contract, or that we will correct, without charge, breakage, maladjustment or other troubles occurring as a result of improper or inadequate maintenance.
10. We will defend any suit or proceeding brought against you so far as based on a claim that any equipment, or any part thereof, furnished under this contract constitutes an infringement of any patent of the United States, provided that such equipment or part is not supplied according to your design, and it is used as sold by us, if notified promptly in writing and given authority, information and assistance (at our expense) for the defense of same, and we shall pay all damages and costs awarded therein against you. In case said equipment or any part thereof is in such suit held to constitute infringement and the use of said equipment or part is enjoined, we shall at our own expense either: procure for you the right to continue using said equipment or part; or replace same with non-infringing equipment; or modify it so it becomes non-infringing; or remove said equipment and refund the purchase price and the transportation and installation costs thereof. The foregoing states our entire liability for patent infringement by said equipment or any part thereof.

11. Purchaser will have the hoistways and machine room in safe and proper condition and the proper electrical current available as indicated on our attached schedule. Purchaser will also provide adequate access for delivery and a dry protected place for storage of equipment. Storage requirement of a minimum of 150 sq ft will be required for this project. If storage constraints force double handling of equipment, we will be compensated by you for all additional costs for labor and materials to overcome such obstacles at our standard billing rate. If the locations where the work is to be performed are not ready or are unsafe, we reserve the right not to begin or to discontinue the work. If adequate storage is not available, we will be compensated for all storage costs, as well as costs for demobilization and remobilization if necessary.

If completion of our work is delayed beyond our control and the following date: \_\_\_\_\_, our price will be increased in proportion to any additional costs to complete, including but not limited to labor rate increases, component material price increases, storage costs, demobilization and remobilization expenses and the like.

12. Should latent or concealed conditions be encountered in the performance of the work below the surface of the ground or should concealed or unknown conditions in an existing structure be at variance with the conditions indicated by the Contract Documents, or should unknown physical conditions below the surface of the ground or should concealed or unknown conditions in an existing structure of an unusual nature differing materially from those ordinarily encountered and generally recognized as inherent in the work of the character provided for in this contract be encountered, the contract price and time shall be equitably adjusted by change order upon claim by either party made within 20 days and after the first observance of the conditions.
13. Any proprietary material, information, data or devices contained in the equipment or work provided hereunder, or any component or feature thereof, remains our property. This includes, but is not limited to, any tools, devices, manuals, software (which is subject to a limited license for use in this building/premises/equipment only), modems, source/access/object codes, passwords and the Schindler Remote Monitoring feature ("SRM") (if applicable) which will deactivate and remove if the Agreement is terminated.
14. Our bid is based on reusing existing components as is in regard to seismic conditions except as herein noted. Any required changes to existing components resulting from seismic requirements will need to be bid separately.

15. You agree to pay, as an addition to the price stated herein, the amount of any federal excise tax, state and local sales, use or transaction tax, or increase of any tax, or similar charges based upon the sale, use, ownership or possession of materials and/or equipment imposed by any law enacted after the date of this proposal, or imposed upon you by any existing law. In the event of legislative change to the applicable tax rates, including but not limited sales tax, use tax, excise tax, privilege tax, transaction tax and similar charges, Supplier reserves the right to adjust the contract price accordingly.

In the event the customer claims an exemption from sales and/or use tax the customer shall provide a valid executed exemption certificate

In the event you claim an exemption which Supplier accepts in good faith and it is later determined by a taxing authority that such exemption does not apply, Schindler reserves the right to adjust the contract price to reflect the change.

Customer shall pay any penalty, interest, additional tax, or other charge that may be levied or assessed as a result of the delay or failure, caused by the Customer, to pay any tax or file any return or information required by law, rule or regulation or by this Agreement to be paid or filed by Supplier.

If either Party is audited by a taxing authority or other governmental entity in connection with taxes under this Taxes Section, the other Party shall reasonably cooperate with the Party being audited in order to respond to any audit inquiries in an appropriate and timely manner, so that the audit and any resulting controversy may be resolved expeditiously.

In the event of governmental changes to applicable tariffs, Schindler reserves the rights to adjust the contract price accordingly to account for all additional cost impacts.

We reserve the right to modify price and schedule without penalty due to material or component shortages, increases in inflation and/or material price increases based upon the S&P Material Price Index (MPI).

16. We are not responsible for the removal of any hazardous materials. We will take possession, remove, and dispose any elevator equipment not being reused.
17. Schindler reserves the right to make technical modifications - in conformity with technological progress and/or safety regulations - to the products and/or to replace the components with components of equal or superior quality at any time until delivery and without further notice.
18. In the event of any change to the applicable code, after the date of this proposal that may affect this installation, you agree to pay Schindler any additional costs and provide the necessary extension of time to comply with the code change.

Subject Schindler Elevator Modernization Proposal - KHIL-D27H22

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Date 2/12/2024

## Schindler Elevator Corporation

By: **Mary Vitt**

\_\_\_\_\_  
(Signature)

Accepted: \_\_\_\_\_  
(Full legal name of Purchaser)

By: \_\_\_\_\_  
(Signature) (Title)

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

∇ Principal or Owner

∇ Agent for Principal or Owner: \_\_\_\_\_  
(Name of Principal or Owner)

\_\_\_\_\_  
Approved: **Schindler Elevator Corporation**

By:

\_\_\_\_\_  
(Signature)

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

## Financing Credit Application

### APPLICANT INFORMATION:

Business Name			Contact	
Street Address		City	State	Zip
Phone	Years in Business	Nature of Business		
___ Own Business Property		___ Rent Business Property (Landlord, Phone #)		
___ Proprietorship    ___ Partnership    ___ Corporation    ___ Limited Liability Corp.				

### INFORMATION ON PRINCIPAL(S):

Name		Title	SS#	
Street Address		City	State	Zip
Name		Title	SS#	
Street Address		City	State	Zip

### BANK REFERENCE:

Name of Bank	Contact & Phone #	Acct #
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### TRADE REFERENCE(S):

Supplier	City/State	Phone #	Contact / Acct #
Supplier	City/State	Phone #	Contact / Acct #

**AUTHORIZATION:** By submitting or signing and faxing the above application, you certify that the information provided in this credit application is accurate and complete and you authorize Schindler Elevator Corp, its successors and/or assigns to obtain information from the references listed and obtain a consumer credit report that will be ongoing and relate not only to the evaluation and/or extension of the business credit requested, but also for purposes of reviewing the account, increasing the credit line on the account (if applicable), taking collection action on the account, and for any other legitimate purpose associated with the account as may be needed from time to time. The individual signing or submitting this application further waives any right or claim, which such individual would otherwise have under Fair Credit Reporting Act in the absence of this continuing consent.

**SIGNATURE OF APPLICANT:** \_\_\_\_\_ **DATE** \_\_\_\_\_

**ECOA NOTICE (TO BE RETAINED BY APPLICANT):** Your business credit application will be reviewed carefully and a decision will be rendered promptly. If your business credit application is denied, you have the right to a written Statement of the specific reasons for denial. To obtain a statement, please contact us within 60 days from the date that you are notified of our decision. We will send you a written statement of the reasons for denial within 30 days of your request. **NOTICE:** The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, gender, marital status, age (provided applicant has the capacity to enter into a binding contract), because all or part of the applicant's income derives from any public assistance program; or because the applicant has, in good faith, exercised any right under the Consumer Credit Protection Act. The federal agency that administers our compliance with this law is the Federal Trade Commission, Equal Credit Opportunity, Washington, DC 20580.



Subject Schindler Elevator Modernization Proposal - KHIL-D27H22

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Date 2/12/2024

### Modernization Invoice Application No. 1

Bill to:		Ship to:		
Company	Lake Forest Library	Lake Forest Library 360 E Deerpath Rd Lake Forest, IL 60045-2252	Invoice Date:	2/12/2024
Address	360 E Deerpath Rd		Invoice Number:	KHIL-D27H22
City	Lake Forest		<u>Billing Terms</u> Progress Bill Terms: Net Due 30 Days Final Bill Terms: Net Due 30 Days	
State	IL			
Zip	60045-2252			
Contact Name				
Agent for				

#### Progress Billing – Elevator / Escalator Installation

Contract Amount 164,433.00

	Work Value	Retention	Net Due
Total Work Completed	86,544.00	4,327.00	82,217.00*
Less Previously Billed	0	0	0.00
Current Application	86,544.00	4,327.00	82,217.00

\*THIS INVOICE IS SUBJECT TO REVISION BASED ON FINAL CONTRACT PRICE

All Invoice / Payment / Contact Questions to:	
Sales Rep Name	Mary Vitt
Office Name	1510
Phone Number	

Remittance
Schindler Elevator Corporation PO Box 70433 Chicago, IL 60673-0433

**Please return this portion with your payment**  
**If paying electronically, please provide the invoice number with your remittance**

Payer: Lake Forest Library  
360 E Deerpath Rd  
Lake Forest, IL 60045-2252  
Invoice Number: KHIL-D27H22  
Invoice Date: 2/12/2024  
Invoice Amount: 82,217.00

Remit To: Schindler Elevator Corporation  
PO Box 70433  
Chicago, IL 60673-0433

8/2/2024

Lake Forest Library  
360 E Deerpath Rd

Lake Forest, IL 60045-2252

RE: Elevator Modernization Proposal  
Lake Forest Library  
Lake Forest, IL 60045-2252  
Proposal KHIL-D27H22

Dear Customer

Schindler Elevator Corporation is very grateful for the opportunity to provide you with our proposal to modernize the elevator system at Lake Forest Library. Schindler is an industry leader in vertical transportation systems with 140 years of experience and over 60,000 employees globally. As our customer, you can be certain the new elevator system will incorporate state of the art technology with the support and expertise to ensure reliable and safe operation for the life of your elevator equipment.

Schindler is proud to be the worldwide leader in escalators and the second largest installer of elevators globally. We move over one billion people per day on Schindler elevators and escalators. We are proposing Schindler's Elevator system for your property. This system's benefits are detailed in the following proposal.

Safety is the top priority for Schindler in everything we do. You can be assured Schindler provides products that meet the most stringent safety requirements in the industry. Our employee and public safety programs are of utmost importance and are non-negotiable items for each and every Schindler employee.

Our sustainability over the past 140 years is a result of our commitment to customer service, innovation and service excellence. Schindler Ahead, our predictive analytics platform, which is now available with each Schindler controller, is our continued commitment to leadership in innovation and customer service.

We thank you, again, for this opportunity and we look forward to discussing our proposal with you at your earliest convenience. You can reach me on my phone at .

Best regards,

Mary Vitt  
Schindler Elevator Corporation  
500 Park Boulevard  
Suite 750  
Itasca, IL 60143



**Schindler**

**Project Scope – Bank A**

Number of Units	1	Capacity	2500
Type	HX	Speed	150
Unit Numbers	01	# of stops	4
Jack Type	Borehole	# of openings	3 Front 1 Rear

	Description of Work	Type	Option
	<b>Machine Room</b>		
1	Control and Power Unit (Control, Power Unit, HX Controller + Power Unit Valve, Pump, Pump Motor, Muffler, HFI, CFI, Hush Kit)		New
5	Schindler Ahead		New
	<b>Governor</b>		
18	Building Emergency Power Interface		NA
19	Battery Lowering		New
20	Code Blue		NA
21	Oil Cooling Unit		NA
22	Oil Feed Line		Reuse
24	Tank Heater		Reuse
26	Rupture Valve		Reuse
28	Machine Room Wiring		New
	<b>Door Operator</b>		
31	Door Operator: Front	GAL MOVFE - 1SSO	New
32	Door Operator: Rear	GAL MOVFE - 1SSO	New
33	Clutch: Front		NA
34	Clutch: Rear		NA
35	Door Restrictors		NA
36	Door Gibs		New
37	Door Fire Tabs		New
38	Electronic Door Detector: Front	3D Door Detector (2019 Code)	New
39	Electronic Door Detector: Rear	3D Door Detector (2019 Code)	New
	<b>Hoistway Door Equipment</b>		
41	Door Tracks		Reuse
42	Door Hangers		Reuse
43	Pickup Assemblies	GAL - 1SSO / 2SSO	New
44	Spirators		NA
45	Sill Closers		Reuse
46	Door Interlocks	GAL - 1SSO / 2SSO	New
	<b>Car and Hall Fixtures</b>		
61	Code Compliant Main COP	Other - Swing	New
62	Code Compliant Aux COP		NA
63	Car PI	Other - In COP	New
64	Car Lantern	Other	New
65	Hall Lantern		NA
66	Hall Position Indication		NA
67	Access Switch	Other - Top & Bottom	New
69	Hall Pushbutton Station	Other - Surface	New
71	Fixture Finish	#4 Stainless Steel	New

Car and Hoistway			
90	Hoistway Wiring	Traveling Cable + Hoistway Wiring	New
92	Car Top Inspection Station and Work Light	HX	New
93	Car top railing	Front & Rear Opening	New
94	Cab fan		New
96	Car Door: Front	1SSO - #4SS	New
97	Car Door: Rear	1SSO - #4SS	New
103	Car roller guides		Reuse
108	Spring Buffers		Reuse
110	Car Rails		Reuse
114	Car top sheave		NA
118	Cab Interior		Reuse
120	Cab Allowance	\$20,000 Allowance	NA
130	Jack Assembly		Reuse
136	Packing		Reuse

All other systems and components not noted above will be reused and integrated into the new elevator system.

### **Cab Interiors Scope – Bank: A**

SEC has included a \$20,000.00 allowance for new plastic laminate cab interior finishes, drop ceiling and installation labor.

## **SCHINDLER AHEAD**

**Your Schindler Modernization package comes enabled with Schindler Ahead.** The **Schindler Ahead Hardware** provides remote connectivity to your equipment and will automatically notify us if any connected component or function is operating outside established parameters. When appropriate, we will communicate with you to schedule service calls.

Monitoring will be performed 24/7 and will automatically communicate with our Customer Service Network using dedicated wireless cellular technology. Schindler will make every reasonable effort to maintain wireless connectivity.

**Schindler Ahead** has three service tiers to fit your individual needs. The tiers are Connect, Enhanced, and Premium. As part of your service agreement, Schindler includes the Enhanced Package upon completion and turnover of the last unit with details as noted herein. This cost is broken out as part of the total monthly maintenance cost of your service agreement.

**Connect** – Schindler's Connect package provides wireless cellular communication from your equipment's controller to Schindler's data network. This allows the Schindler Cube to be connected to your equipment 24/7. Connect also provides access to the basic features of ActionBoard and ActionBoard Mobile, giving you real time information on your equipment.

**Enhanced** – The Enhanced Package includes the features of Connect, plus access to Schindler's Elevated Support Professional (ESP) Team. This team analyzes information gathered by Schindler Ahead, which improves the reliability of your equipment and improves the response time. The ESP Team can alert you when a shutdown is detected, helps confirm issues remotely, and provides real-time ETAs for technicians en route. With these enhanced diagnostics, we can guarantee that you will not be charged for Running on Arrival calls. Under the "No Running on Arrival Guarantee," Schindler will fully cover the cost of any callback related to the following situations: Elevator or Escalator Running in normal operation, or running under any of the following special services modes: Independent service, Fireman's service (Phase I or Phase II), or Inspection operation. All other callbacks will be billed as outlined in the service agreement.

**Premium** – The premium package is our top tier and was created for customers requiring the most comprehensive level of service. Our premium package offers the highest level of functionality and support. The Premium tier also includes concierge level assistance for all of your service needs.

The Enhanced Package and Premium include access to **Schindler ActionBoard and ActionBoard Mobile**, which are communication technologies that provide access to real-time information about your equipment. Some of the available information includes: performance history, reports, push notifications, service call records, unit profiles and more.

Additionally, Schindler Ahead enables the option to add **Digital Alarm**, a cellular emergency phone monitoring service, to any tier. This service includes a reliable cellular connection that allows incoming and outgoing emergency calls from the elevator cab and eliminates the need for a traditional analog phoneline.

## Work by Others

The owner will provide the following requirements based on ANSI A17.1 Code, the governing code, except when applicable codes conflict with ANSI A17.1 Code. Rules referenced are ANSI A17.1 Rules.

### Hoistway

1. Provide 75-degree bevel guards on all projections, recesses or setbacks over two inches, except for the loading or unloading side. Rule 100.6.
2. Provide pit light and GFI outlet. Light switch to be located adjacent to each pit entrance.
3. Provide a legal hoistway inclusive of ventilation and shaftway bevel guards, as required.
4. Cutting and patching walls and floors.
5. Provide a pit access ladder for each elevator, where required.
6. Provide a lockable, self-closing, fire-rated pit door, where required.
7. Hoistway venting or pressurization to prevent accumulation of smoke and gas, as required by Local Building Code.

### Machine Room

1. Enclose/relocate all non-elevator oriented conduit, ducts and drains from elevator machine room, where required in the machine hoistway and/or pit. Enclosures, when used, need to be two-hour rated.
2. Provide means to regulate control room temperature and humidity between 55° F and 90° F with relative humidity no more than 85% non-condensing. Peak equipment heat release is a minimum of 6,000 BTU/Hour/Unit (maximum = 9,000 BTU/Hour/Unit) for a Hydraulic unit.
3. Provide machine room smoke/heat detector as required by regulation. In the event sprinklers are anticipated within the machine room area, means to remove primary power prior to the application of water must be provided as required by code.
4. Provide new electric wiring from the present disconnect switches to the terminals of the new elevator controllers in the new locations, inclusive of a normal/standby 120 VAC, 15 AMP supply at each controller.
5. Provide connection at the first elevator controller for fire recall operation, where auto-recall is needed to respond to a life safety/fire alarm system.
6. Provide proper lighting in the elevator machine rooms within the vicinity of every controller and mainline disconnect per code requirements.
7. Provide a fused disconnect switch or circuit breaker and a light switch adjacent to the lock jamb-side of the machine room door for each elevator location, per the National Electric Code. Rule 210.5 and NFPA No. 70 Rule 620-51. Provide auxiliary disconnects, as required, based on the elevator contractor's drawings.
8. Provide copper wire feeder and branch wiring circuits to the controller, including a main line switch and convenience outlets.
9. Provide a telephone outlet near an elevator controller in each machine room.
10. Provide a self-closing and locking access machine room door.
11. Provide an "ABC" fire extinguisher.
12. Interfacing to and updating the existing fire life safety systems to meet current code requirements.

13. A separate 20 amp circuit will be provided if tank heater is provided with the elevator.
14. Hxpress oil coolers / heaters need to be on a dedicated circuit.

### **General Requirements**

1. Provide sufficient space for storage of materials on site throughout the duration of the modernization.
2. Provide clear floor space to be used as a work area.
3. If not presently outfitted, each elevator lobby should be equipped with smoke detectors, which can be used to initiate automatic fire recall. Actuation from water flow sensing or the general building alarm may require special approval.
4. Paint new or modified hoistway equipment to match building aesthetics, as required.
5. Provide building signage and floor designations related to other building systems, as required.
6. Provide building corridor lighting sufficient for illumination of elevator landing sills, as required by code.

### **Electrical Requirements**

1. The permissible voltage drop for elevator feeders shall not exceed 3% between the service delivered to the building and our supply terminal.
2. All three legs of the three-phase feeder must be hot with respect to ground and balanced to each other with no more than a 5% variation between individual legs.
3. The maximum permissible voltage variation measured in the machine room under all operating conditions shall not exceed plus or minus 10% of the nominal building supply power source voltage.
4. A 20-amp, single phase, 110VAC, dedicated circuit with a duplex receptacle for the oil heater unit.
5. FOR EMERGENCY POWER OPERATION OF ELEVATOR(S): (when required)
  - A. Provide an emergency generator that has the same voltage characteristics as the normal power supply. It should also have the capacity to deliver sufficient power to the main line disconnect switches in the elevator machine room for operating the specified number of elevators used during an emergency at full speed and full load.
  - B. Provide an automatic transfer switch, or switches, for transferring power from normal to emergency power and back again.
6. EMERGENCY POWER OPERATION SIGNAL - The following separate indicating signals will be required from the automatic transfer switch to the machine room communication unit for each group of elevators.
  - A. One dry contact to close on emergency power and open on normal power. Provide two #12 AWG wires.

- B. Provide one normally open dry contact (pre-transfer) to close 30 to 60 seconds prior to transfer to emergency power or back to normal power. This contact should reopen immediately after actual transfer of power. This is to prevent transfer of power while an elevator is moving, which can occur during the return to normal power or on an operating test. Provide two #12 AWG wires.

Note: When operating elevators on emergency power, a means of absorbing the regenerative energy may be necessary and shall be provide by others.

It is required that the car light, the fan circuits, ascending car protection circuit and the intercom circuit (if supplied), be set to operate from the emergency power supply in accordance with the building code.

7. The SCCR rating of elevator equipment is 5000 Amps, contractor to ensure that the available fault current of the building supply at the service switch does not exceed this value (Per NEC 110.10). Contractor to include a label (please see figure 2- Available Fault Current Label Example) that identifies the Max Available Fault Current onto Disconnect.

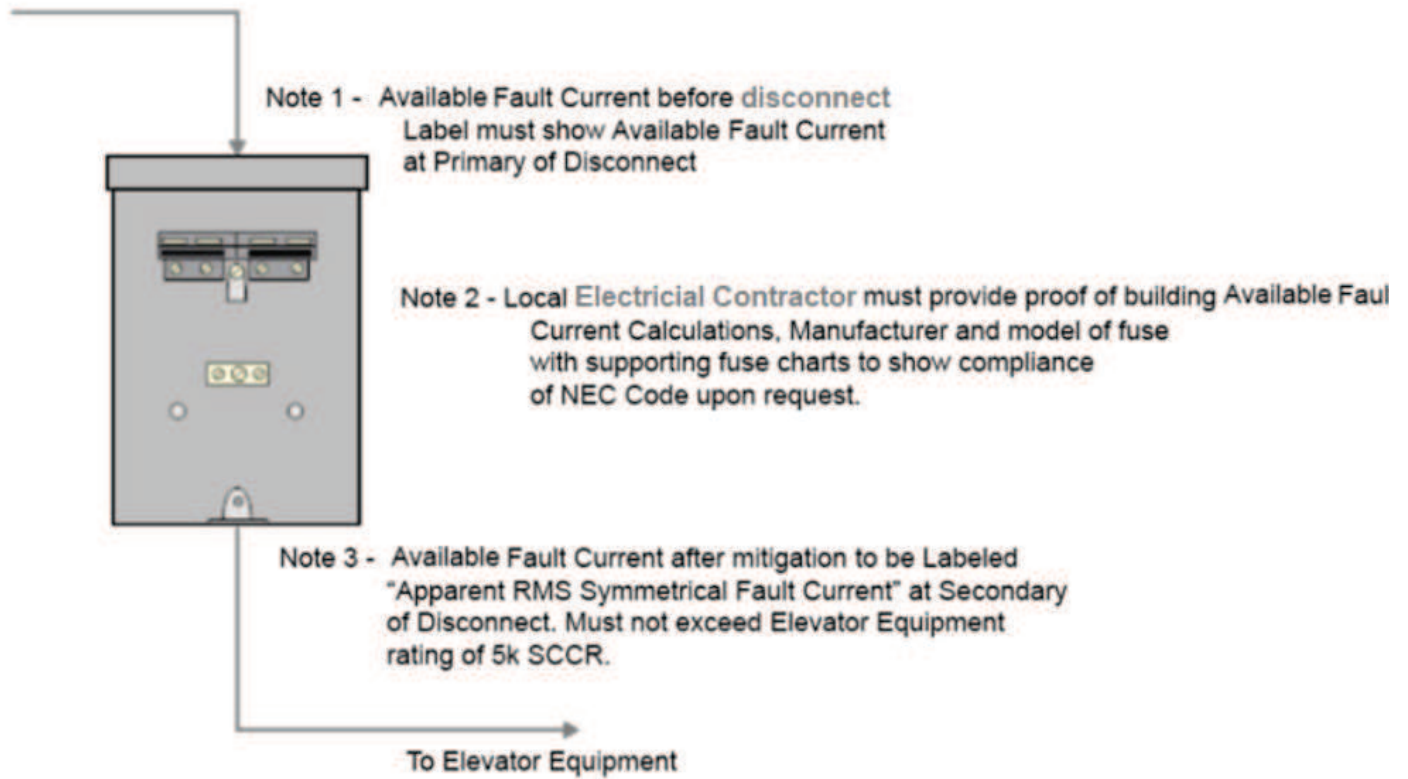
- A. See Note 1 of Figure 2, Available Fault Current Labelling Diagram. In addition, we require a hard copy of the manufacturers Fuse Chart and rating verifying the available fault current meets requirements.
- B. Per NEC 110.24, the service switch should be legibly marked with Apparent RMS Symmetrical fault current supplying the Elevator Equipment. \*\*See note 3 of AVAILABLE FAULT CURRENT RATING LABELLING DIAGRAM.

8. NETWORK CONNECTION REQUIREMENT FOR TWO-WAY VISUAL COMMUNICATION DEVICE (A17.1-2019 / B44-19 or IBC 2018)

- A. Where the elevator rise is 18m (60 ft) or more, or seismic operation is provided according to A17.1-2016 or later requirements, a single RJ45 wired Ethernet communications circuit shall be provided by the building. This Ethernet connection shall be located in the machine room associated with the Elevator Control Visual Alarm Box for the master elevator group.
- B. Where the elevator rise is below 18m (60ft), and seismic operation is not provided according to A17.1-2016 or later requirements, separately wired RJ45 Ethernet communications circuits, one per elevator group, shall be provided by the building. This Ethernet connection shall be located in the machine room associated with each Elevator Control Visual Alarm Box.
- C. The network must have enough bandwidth for connecting to multiple elevators and displaying a series of images with adequate resolution to identify the presence and general condition of passengers in the elevator. The recommended minimum upload speed is 0.5Mb/s per elevator connected to the communication system. Note that networks are commonly rated by their download speed with a lower upload speed.
- D. The communications circuit shall originate at the Elevator Control Visual Alarm Box, part of the two-way visual communication device designed by Schindler and terminate at the building WAN internet equipment routed via a 1" conduit.
- E. This internet connection is required to have an un-interruptible power supply for a duration of 4 hours to allow for the Visual Communication Device to function if building power is lost.



From Building Electrical Distribution Panel



**FIGURE 1:** AVAILABLE FAULT CURRENT RATING LABELLING DIAGRAM

## Price and Payment Terms

1. Our price for the work proposed is as noted below including appropriate tax and will be added to the invoice/billings. This price is firm for 30 days, and thereafter subject to change without notice.

**1. Base Modernization Price: \$164,433.00**

**2. Price for Related Work: \$86,432.00**

**3. Cab Interior Allowance: \$20,000.00**

**4. Total Price for Modernization: \$270,865.00**

You agree to the following payment schedule for the lump sum option:

- Initial Invoice: 50% of the price quoted above upon execution of this Contract;
- Progress Invoice: 95% of the remaining balance to be paid in one installment upon fabrication of material;
- Final Invoice: Final payment within 30 days of completion of the work.

All invoices, including final invoice are payable within 30 days of application.

Any late or overdue payments will bear interest at the rate of 1 ½% per month. Attorneys' fees and other costs of collection will be included in the event that we must pursue legal action for payment or in the event that you are otherwise in breach of this contract.

We will not release to manufacture until the above initial invoice is paid. We will not schedule on-site work until the above progress invoice is paid. We will not turn over equipment prior to receipt of 95% of the price for the work inclusive of change notices.

- \*2. Schindler understands the costs for capital improvement can put a strain on a property's budget. Schindler has partnered with leading Finance organizations in an effort to help our clients sort through the best options to fund these capital improvements. We have simplified the process so all private financial information as well as future payments are handled between the Finance organization's representative and our client. Schindler facilitates the transaction and only requires a new 5-year maintenance contract as part of the agreement. Financing option is subject to credit check and approval.

Often times there are other building components which require upgrade due to the upgrade of the elevator system. These costs can be rolled into the total finance package with the lender.

If for some reason our contract is cancelled prior to the 60-month term all remaining balances become due immediately. \*Monthly finance payment is an approximation and will be finalized following the credit check and contract.

Your sales representative, Mary Vitt, will be happy to facilitate the process moving forward if you are interested in our financing option. The finance credit approval form can be found attached to this document.

3. Our price for the cab interiors which is included in the above price is \$0 (total for the job).

## General Terms and Conditions

1. The price quoted in Article 1 above is based upon all the work being performed during our regular working hours of regular working days. If overtime is required, the additional price usually charged by us shall be added to the contract price. Your advance approval in writing is required before we will schedule or perform any overtime work.
2. The equipment furnished hereunder remains personal property and we retain title thereto until final payment is made, with the right to retake possession of the same at the cost of the Purchaser if default is made in any of the payments, irrespective of the manner of attachment to the realty, the acceptance of notes, or the sale, mortgage or lease of the premises.
3. The completion of the work as covered by this Agreement or acceptance thereof shall constitute a waiver by you of all claims for loss or damage due to delay. It is also understood and agreed that we shall not be liable for the condition, design, application or compliance with acceptable codes of any equipment not furnished under this Agreement or for the omission of any work or equipment not covered by this Agreement. We reserve the right to remove and retain all equipment that has been replaced or new materials not used in construction.
4. Schindler reserves the right to furnish its most modern of equipment and no statements contained in this contract are to make it obligatory for us to furnish equipment, the design of which has been discontinued or supplanted by new standards or codes.
5. All previous communication between us, whether written or verbal, with reference to the subject matter of this Agreement, is hereby abrogated, and this contract when duly accepted and approved constitutes the agreement between us, and no modification of this agreement shall be binding upon the Purchaser or Schindler, or either of us, unless such modification shall be in writing, duly accepted by the Purchaser and approved by Schindler. The contract date shall be the date of approval by Schindler.
6. The Purchaser is to provide suitable connections from the power mains to the controller, together with any cutouts, line switches, phase reversal or lightning arresters, and any other such components as that may be necessary to meet purchaser and/ or local code requirements.
7. Any changes in the building required to meet any local or state building or electrical codes are to be made by the Purchaser. Any cutting or patching necessary for the installation of equipment furnished under this contract shall be done by the Purchaser. Schindler shall not under any circumstances be liable for any redecorating that may be necessary upon the completion of its work. No work or service other than that specifically mentioned herein is included or intended. Such work by others must be coordinated by Purchase with Schindler in order to avoid delays to Schindler's work.

- 8A. It is expressly understood, in consideration of the performance of the service enumerated herein at the price stated, that nothing in this agreement shall be construed to mean that Schindler assumes any liability on account of injury or damage to persons or property, except to the extent directly and solely due to the negligent acts or omissions of Schindler or its employees; and that the Purchaser's responsibility for injury or damage to persons or property while riding on or being in or about the equipment referred to is in no way affected by this Agreement.

Schindler shall not be responsible or liable for any loss, damage, detention or delay caused by labor trouble, strikes, lockouts, fire, explosion, theft, lightning, windstorm, earthquake, floods, storms, epidemics, pandemics, riot, civil commotion, malicious mischief, embargoes, shortages or materials or workmen, unavailability of material from usual sources, Government priorities or requests or demands of the National Defense Program, civil or military authority, war, insurrection, failure to act on the part of the Purchaser's or Schindler's suppliers, orders or instructions of any federal, state or municipal government or any department or agency thereof, Act of God, or by any cause whatsoever beyond its reasonable control. Dates for the performance or completion of work shall be extended to the extent of such delays.

- 8B. Purchaser agrees to defend, indemnify and hold Schindler harmless from and against any claims, lawsuits, demands, judgments, damages, costs and expenses arising out of this Agreement except to the extent caused by or resulting from the established sole and direct fault of Schindler.
- 8C. We reserve the right to modify price and schedule without penalty due to material or component shortages.
- 8D. We will not be liable for damages of any kind, whether in contract or in tort, or otherwise, in excess of the price of this Agreement. We will not be liable in any event for special, indirect, liquidated or consequential damages, which include but are not limited to loss of rents, revenues, profit, good will, or use of equipment or property, or business interruption.
9. Schindler guarantees that the equipment furnished hereunder will comply with the foregoing specifications and if promptly notified in writing will, at our expense, correct any defects in such equipment occurring within one year from the date of completion or acceptance whichever occurs first, which are not due to ordinary wear and tear or improper use, care or maintenance. The correction of such defects constitutes the limit of our responsibility. THERE ARE NO OTHER WARRANTIES OR GUARANTEES, EXPRESS OR IMPLIED, OTHER THAN OF TITLE. The equipment installed under this agreement requires maintenance service, such as periodic examinations, lubrication and adjustment by competent elevator mechanics. Our guarantee is not intended to supplant this normal servicing of the equipment and it is not to be construed that we will provide free maintenance service of this type, except as may be provided under other provisions of the contract, or that we will correct, without charge, breakage, maladjustment or other troubles occurring as a result of improper or inadequate maintenance.
10. We will defend any suit or proceeding brought against you so far as based on a claim that any equipment, or any part thereof, furnished under this contract constitutes an infringement of any patent of the United States, provided that such equipment or part is not supplied according to your design, and it is used as sold by us, if notified promptly in writing and given authority, information and assistance (at our expense) for the defense of same, and we shall pay all damages and costs awarded therein against you. In case said equipment or any part thereof is in such suit held to constitute infringement and the use of said equipment or part is enjoined, we shall at our own expense either: procure for you the right to continue using said equipment or part; or replace same with non-infringing equipment; or modify it so it becomes non-infringing; or remove said equipment and refund the purchase price and the transportation and installation costs thereof. The foregoing states our entire liability for patent infringement by said equipment or any part thereof.

11. Purchaser will have the hoistways and machine room in safe and proper condition and the proper electrical current available as indicated on our attached schedule. Purchaser will also provide adequate access for delivery and a dry protected place for storage of equipment. Storage requirement of a minimum of 150 sq ft will be required for this project. If storage constraints force double handling of equipment, we will be compensated by you for all additional costs for labor and materials to overcome such obstacles at our standard billing rate. If the locations where the work is to be performed are not ready or are unsafe, we reserve the right not to begin or to discontinue the work. If adequate storage is not available, we will be compensated for all storage costs, as well as costs for demobilization and remobilization if necessary.

If completion of our work is delayed beyond our control and the following date: \_\_\_\_\_, our price will be increased in proportion to any additional costs to complete, including but not limited to labor rate increases, component material price increases, storage costs, demobilization and remobilization expenses and the like.

12. Should latent or concealed conditions be encountered in the performance of the work below the surface of the ground or should concealed or unknown conditions in an existing structure be at variance with the conditions indicated by the Contract Documents, or should unknown physical conditions below the surface of the ground or should concealed or unknown conditions in an existing structure of an unusual nature differing materially from those ordinarily encountered and generally recognized as inherent in the work of the character provided for in this contract be encountered, the contract price and time shall be equitably adjusted by change order upon claim by either party made within 20 days and after the first observance of the conditions.
13. Any proprietary material, information, data or devices contained in the equipment or work provided hereunder, or any component or feature thereof, remains our property. This includes, but is not limited to, any tools, devices, manuals, software (which is subject to a limited license for use in this building/premises/equipment only), modems, source/access/object codes, passwords and the Schindler Remote Monitoring feature ("SRM") (if applicable) which will deactivate and remove if the Agreement is terminated.
14. Our bid is based on reusing existing components as is in regard to seismic conditions except as herein noted. Any required changes to existing components resulting from seismic requirements will need to be bid separately.

15. You agree to pay, as an addition to the price stated herein, the amount of any federal excise tax, state and local sales, use or transaction tax, or increase of any tax, or similar charges based upon the sale, use, ownership or possession of materials and/or equipment imposed by any law enacted after the date of this proposal, or imposed upon you by any existing law. In the event of legislative change to the applicable tax rates, including but not limited sales tax, use tax, excise tax, privilege tax, transaction tax and similar charges, Supplier reserves the right to adjust the contract price accordingly.

In the event the customer claims an exemption from sales and/or use tax the customer shall provide a valid executed exemption certificate

In the event you claim an exemption which Supplier accepts in good faith and it is later determined by a taxing authority that such exemption does not apply, Schindler reserves the right to adjust the contract price to reflect the change.

Customer shall pay any penalty, interest, additional tax, or other charge that may be levied or assessed as a result of the delay or failure, caused by the Customer, to pay any tax or file any return or information required by law, rule or regulation or by this Agreement to be paid or filed by Supplier.

If either Party is audited by a taxing authority or other governmental entity in connection with taxes under this Taxes Section, the other Party shall reasonably cooperate with the Party being audited in order to respond to any audit inquiries in an appropriate and timely manner, so that the audit and any resulting controversy may be resolved expeditiously.

In the event of governmental changes to applicable tariffs, Schindler reserves the rights to adjust the contract price accordingly to account for all additional cost impacts.

We reserve the right to modify price and schedule without penalty due to material or component shortages, increases in inflation and/or material price increases based upon the S&P Material Price Index (MPI).

16. We are not responsible for the removal of any hazardous materials. We will take possession, remove, and dispose any elevator equipment not being reused.
17. Schindler reserves the right to make technical modifications - in conformity with technological progress and/or safety regulations - to the products and/or to replace the components with components of equal or superior quality at any time until delivery and without further notice.
18. In the event of any change to the applicable code, after the date of this proposal that may affect this installation, you agree to pay Schindler any additional costs and provide the necessary extension of time to comply with the code change.



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Proposal #24291  
7/17/2024

**Attn:** Dave Alexander  
SCHINDLER Elevator  
200 E Randolph #5400  
Chicago, IL

Job Location:  
Lake Forest Public Library  
360 E Deerpath Rd.  
Lake Forest, IL

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Vertical Contracting Services proposes to provide necessary labor and material to perform the following services **Modernization of One Hydraulic Passenger Elevator** for **SCHINDLER Elevator**:

***Elevator Machine Room Work***

1. Provide and install new 60A 240V shunt trip breaker with auxiliary contacts for elevator mainline power. Connect to new elevator controller.
2. Provide and install new 30A 240V heavy duty fused disconnect for elevator cab lighting. Connect to new elevator controller.
3. Provide and install new 30A 240V heavy duty fused disconnect for in car communications / camera system. Provide new circuit for system. Provide cord and plug connection to UPS for system power.
4. Existing machine room lighting to remain. Provide GFCI receptacle in the elevator machine room.
5. Install conduit for elevator phone line in the elevator machine room. Connect to new elevator controller.

***Elevator Pit Work***

1. Provide and install new 4' LED fixture, wall switch, GFCI receptacle, and sump pump receptacle in the elevator pit.

***Elevator Recall Work***

1. Install new riser in the elevator hoistway for the addressable fire alarm circuit. Install all free air fire alarm cable in conduit. *Elevator contractor to provide up to 12 hours cartop time for riser installation.*
2. Provide and install new addressable smoke detector in each of 4 elevator lobbies. *Elevator contractor to provide up to 4 hours cartop time for smoke detector install.*



3. Provide and install new addressable smoke detector and addressable heat detector at the top of the elevator hoistway. *Elevator contractor to provide up to 4 hours cartop time for smoke detector install*
4. Provide and install new addressable smoke detector, heat detector, and relays for elevator recall in the elevator machine room. Connect new relays to the new elevator controller.
5. Provide tech for programming, pretest with the elevator contractor, and final test with the local elevator inspector.

#### ***Other Required Work***

1. Provide patching as needed in the elevator hoistway. *Elevator contractor to provide up to 4 hours cartop runtime*
  
2. Provide and install new oil minder type sump pump in the elevator pit.





### ***Other Recommended Work***

1. Provide and install new 2-ton split type AC unit for the elevator machine room. Provide new circuit for AC unit.

Payment Terms:

**50 % Down Payment/Progress Payments/Final Payment**

Terms and Conditions pertaining to this Proposal and the Work are attached hereto as Schedule A.

Thank you for the opportunity to provide a proposal for this project. We value your business and therefore should you have any questions, please feel free to contact me. [dan@vcselectric.com](mailto:dan@vcselectric.com)

Sincerely,

Dan Moersfelder  
Foreman/Supervising Electrician

Accepted by  
(Signature): \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Print  
Name: \_\_\_\_\_ Title: \_\_\_\_\_

Purchase Order# \_\_\_\_\_



## **SCHEDULE A**

### **Terms and Conditions**

#### **1. Safety Rules; Precautions; Performance**

- a. Client shall be responsible for compliance with all applicable statutes, ordinances, Codes, and other governmental requirements and shall notify VCS in writing before starting the Work if any conditions at the property where the Work will be performed are not in compliance therewith. Client specifically agrees to abide by and observe all safety orders, rules, regulations or requirements of all federal, state and local government agencies exercising safety jurisdiction over the Work, including, but not limited to, all standards or regulations of the Occupational Safety & Health Administration which are applicable to the Work being performed. The parties agree that Client is solely responsible for providing a safe work area.
- b. Client shall take all precautions necessary to protect persons or property against risk of death, bodily harm, injury or damage, including, but not limited to providing for the safety of and prevention of accident or injury to VCS and its employees, agents and invitees while in, on or about the Property or while completing the Work and by giving said persons such notice of dangerous conditions and activities, by installing and maintaining at all times such safety devices, guards, barricades and danger signs and by adopting such other measures as shall be necessary to safeguard said persons against all such dangerous conditions and activities however arising. Client shall maintain pits and machine rooms in a clean, temperature-controlled, dry condition. Client shall remove and/or remediate all waste or hazardous materials in line with applicable laws and regulations, and will provide both proper lighting and a grounded, 3-prong electrical system where needed. Client shall furnish a complete, accurate and up-to-date set of 'as built' wiring diagrams reflecting all previous changes to the equipment.
- c. It is understood between the Parties that VCS retains its mechanics lien and legal and equitable title to all equipment installed in the subject building until VCS receives full payment of its outstanding invoices.

#### **2. Insurance**

- a. Client shall always procure and maintain in effect during the term of this Proposal, at its sole cost and expense, insurance covering the obligations and liabilities relating to the Work under this Proposal. All such policies relating to the Work shall name VCS as an "additional insured" and shall be subject to review by VCS to ensure that the policies and coverages are, in VCS's reasonable judgment, adequate to cover Client's obligations and liabilities relating to the Work. Additional insurance or bond coverage beyond that which is required to comply with all terms and conditions set forth herein may be procured by Client, at its sole cost and expense.

#### **3. Payment**

- a. All payments are due within thirty (30) days upon receipt of invoice unless otherwise specified on the invoice. VCS reserves the right to postpone or cancel scheduled work upon Client's failure to make timely payment. Such postponement or cancellation shall not be deemed a default by VCS hereunder.
- b. In the event of a cancellation of a work order, the Client will be charged for all materials and labor expenses incurred prior to such cancellation, plus an additional fee equal to fifteen percent (15%) of the Total Price of the Proposal.
- c. The Client shall pay all re-stocking fees associated with a change in the scope of the Work or cancellation of the Work.
- d. The Proposal does not include fees or estimated costs for overtime, patching or operator time unless specified.

#### **4. Taxes**

- a. Client shall pay all sales, use and other taxes of every kind on labor, equipment and materials used in connection with the Work and, unless otherwise provided in this Proposal, Client at its cost shall secure such permits, licenses, and/or inspections necessary for the proper execution and completion of the Work.



**5. Confidentiality**

- a. During the term of this engagement and for three (3) years thereafter, the Client shall not disclose or make use of VCS's confidential information, including all non-public information or documentation obtained in connection with the services performed under this Proposal, except for purposes of performing such services. The Client agrees and acknowledges that any breach of the confidentiality provision contained herein may cause VCS irreparable harm for which monetary damages may be inadequate. Accordingly, VCS will be entitled to seek injunctive or other equitable relief, in addition to all other remedies available at law and in equity, to remedy any threatened or actual breach of the confidentiality provision of this Proposal by the Client.

**6. Indemnification; Limitations on Liability**

- a. Client agrees to indemnify, defend and hold VCS harmless from all losses, claims, liabilities, damages, expenses, including attorneys' fees, that arise out of (a) any breach of this Proposal by Client, its affiliates or representatives, (b) failure to make timely payment of all cost and charges under this Proposal, and (c) any damages caused by the negligence, recklessness, willful misconduct, fraud or criminal acts of the Client, its affiliates or representatives.
- b. VCS agrees to indemnify, defend and hold Client harmless from all losses, claims, liabilities, damages, expenses, including attorneys' fees, that arise out of VCS's gross negligence in the performance of the Work.
- c. Under no circumstances shall VCS be liable for any indirect, special, liquidated or consequential damages, punitive damages or damages caused by the negligence or wrongful misconduct of others, of any kind, whether arising under contract, tort or otherwise. VCS will not be liable for direct damages of any kind, whether in contract, tort, or otherwise, in excess of the price of this Proposal. Client shall have six months from the time of an alleged breach of contract or other cause for which liability is asserted against VCS to initiate legal action against VCS.

**7. Governing Law**

- a. This Proposal shall be governed by the laws of the State of Illinois.

**8. Term and Termination**

- a. This Proposal is valid for thirty (30) days from the date hereof. If not accepted within such 30-day period, this Proposal shall be deemed withdrawn and of no force or effect.

**9. Attorneys' Fees**

- a. In any litigation, arbitration or other proceeding by which one party either seeks to enforce its rights under this Proposal (whether in contract or in tort, or both) or seeks a declaration of any rights or obligations under this Proposal, the prevailing party (as determined by the trier of fact) shall be awarded reasonable attorney fees, together with any costs and expenses, to resolve the dispute and to enforce the final judgment.

**10. Force Majeure**













- a. In the event that VCS shall be delayed or hindered in or prevented from the performance of any portion of the Work by reason of acts or omissions of the Client, strikes, lock-outs, labor troubles, inability to procure labor, inability to procure materials or equipment or reasonable substitutes therefor, failure of power, fire or other casualty, restrictive government laws or regulations, judicial orders, enemy or hostile government actions, riots, insurrection or other civil commotions, war or other reason of a like nature not at the fault of VCS ("Force Majeure"), then performance of such portion of the Work shall be excused for the period of delay and the period for the performance of any such act shall be extended for a period equivalent to the period of such delay.












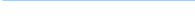







**11. Other**

- a. Client signature binds financial responsibility for payment of VCS invoices in accordance with the payment terms set forth above.
- b. The signing party certifies that all information contained in this document is correct and agreeable.



- c. Acceptance of this Proposal is an acknowledgement that only the Work will be performed by VCS. Any additional services must be addressed through a separate and distinct proposal.
- d. The provisions contained herein shall survive termination or expiration of this Proposal and shall not be limited in any way by the amount or type of insurance obtained by Owner or Contractor or any other party.

ID		Task Mode	Task Name	Duration	Start	Finish	3rd C Jul
1			<b>Lake Forest Library Elevator Modernization</b>	<b>114.5 days</b>	<b>Wed 8/21/24</b>	<b>Tue 1/28/25</b>	
2			Selection & notification/ Site surveys & engineering/ submittals & approvals	1 day	Wed 8/21/24	Wed 8/21/24	
3			Complete negotiations & approval of contract/ downpayment received	5.5 wks	Thu 8/22/24	Mon 9/30/24	
4			Equipment lead time	12 wks	Mon 9/30/24	Mon 12/23/24	
5			Mod Week 1: Mobilize, unload & stage material, machine room, start up (Includes time for Christmas & NYE Holidays)	1 wk	Mon 12/23/24	Mon 12/30/24	
6			Mod Week 2: Demo hoistway, cartop equipment, hall & car fixtures	1 wk	Mon 12/30/24	Mon 1/6/25	
7			Mod Week 3: Install new fixtures, install new car door operators	1 wk	Mon 1/6/25	Mon 1/13/25	
8			Mod Week 4: Install door locks, landing vanes complete mechanical equip install	1 wk	Mon 1/13/25	Mon 1/20/25	
9			Mod Week 5: Final wiring & system adjustment, AHJ & SAIS inspection with fire alarm	1 wk	Mon 1/20/25	Mon 1/27/25	
10			Final cleaning/ Painting & demobilize from site	1 day	Mon 1/27/25	Tue 1/28/25	

Project: Lake Forest Library_MO Date: Mon 8/12/24	Task		Inactive Summary		External Tasks	
	Split		Manual Task		External Milestone	
	Milestone		Duration-only		Deadline	
	Summary		Manual Summary Rollup		Progress	
	Project Summary		Manual Summary		Manual Progress	
	Inactive Task		Start-only			
	Inactive Milestone		Finish-only			



# Schindler Modernization Proposal

Lake Forest Library



**Schindler**

Modernization



**Schindler Elevator Corporation (SEC)**  
**150 S Wacker Dr. Suite 3010**  
**Chicago, IL 60606**  
**Main Office Phone: 312-319-3200**  
**Main Office Fax: 312-896-9222**

**Modernization Contact:**  
**David Alexander**  
**Email: [david.alexander@schindler.com](mailto:david.alexander@schindler.com)**  
**Phone: 917-217-6254**  
**Fax: 312-896-9222**

**Corporate Philosophy:**

Schindler is an industry leader in vertical transportation systems with 150 years of experience and over 60,000 employees globally. Schindler is proud to be the worldwide leader in escalators and the second largest installer of elevators globally. Safety is the top priority for Schindler in everything we do. You can be assured Schindler provides products that meet the most stringent safety requirements in the industry. Our employee and public safety programs are of utmost importance and are non-negotiable items for each Schindler employee. Our sustainability over the past 140 years is a result of our commitment to customer service, innovation, and service excellence.

**Scope Statement:**

Schindler intends to upgrade key components on this unit – inclusive primarily of a new Schindler HX Hydraulic power unit, GAL front & rear door operators, car doors & tracks for more reliable and code compliant door operation. We also include required “related” work required to be brought up to current code as a result of the elevator modernization.

**Project Approach & Implementation:**

If SEC is fortunate enough to be awarded this project, we will quickly schedule a thorough site engineering survey to field verify dimensions, clearances, capacities of all components to be replaced with the elevator modernization. After our vendors and engineers have had a few weeks to review this information, we will submit our fixtures, finishes & power data sheets for your review & approval.

For this we like to sit down with key personnel from the Library to review these documents in a project kick-off meeting – where can answer any pertinent questions regarding the modernization. Upon receipt of referenced approvals, an executed contract, and down payment for engineering, drawings, and material fabrication – we can schedule the job for production. Material lead times are approximately 12 weeks. Approximately 1 month prior to our start date, we will schedule a confirmation meeting to ensure all parties agree about items discussed in the kick-off meeting.

The modernization begins with tool & material delivery & staging, followed by landing the elevator on rated pipe stands and machine room demo and install of new controller & hydraulic tank, and start up in week 1. Once the car is running off the new controller and tank, work shifts to the hoistway, corridor and cartop for approximately 2-3 weeks. Once the mechanical portion of the installation is complete- we transition into wiring and adjustment of the elevator to ensure it is ready for inspection with the authority having jurisdiction (AHJ) as well as the Schindler Acceptance & Inspection Standard (SAIS) inspection by inspectors independent of our local field office. When all items are signed off, the car can be returned to normal operation.

We understand that a modernization is a great imposition to a building, particularly one which serves the public, but it is also an essential means to update equipment that may be, or soon become obsolete, and increase the safety, reliability & maintainability of the device for years to come. The library will primarily be impacted by the lack of an operational elevator for public use during the MOD. Periodic cutting, grinding noise and smell will also occur during the demo phase early in the modernization. Noises associated with drilling and impacts can also be expected as well. Fire alarm devices will need to be taken offline during working hours. In the final week of the modernization, the fire alarm system will need to be tested for proper operation in concert with the elevator inspection. During this time frame, you can expect loud noises from fire alarm device actuation and repeated recall of the elevator.

**Warranty/ Guarantees for Completed Work:**

Our proposal includes our basic warranty wherein we guarantee that the equipment will comply with the contractual specifications and certifications therein, and if promptly notified in writing will, at our expense, correct any defects in workmanship or materials occurring 1 year from the above date which are not due to ordinary wear and tear, to improper use, care, or maintenance, or to vandalism. This warranty is applicable only to those items which were included in the items newly installed and/or replaced with new in accordance with our contractual scope. Items which were retained or refurbished under this contract are not included in this warranty. The equipment furnished and installed under this agreement requires maintenance service, such as periodic examinations, lubrication, and adjustment by competent mechanics, specially trained to service said equipment. Our guarantee is not intended to supplant this normal servicing of the equipment and it is not to be construed that we will provide maintenance service of this type, without charge, except as may be provided under our contract, or that we will correct, without charge, breakage, maladjustment, or other troubles arising out of or occurring because of the lack of maintenance or improper/inadequate maintenance provided by others.

It is Schindler's hope to be able to win the maintenance contract for this unit upon completion of the modernization. Maintenance contract and pricing for this location is provided in a separate document submitted concurrently with this proposal. In the event that the Library opts for a year of Warranty Maintenance/ New Product Service (NPS), prior to the award of a longer term maintenance agreement, that price would be \$245.00/ per month for a 12 month period commencing at the turnover of the elevator.

**Organization History/ Experience:**

Please find included SEC Fact sheet for review.

**Personnel:**

Please find included SEC's US Org chart for higher echelon leadership. I will focus this section on our local modernization & service team.

- a. Existing Installations Maintenance Team for suburban Chicago-land:
  - 1. General Manager: Brandon Buettner
  - 2. Sales Account Rep: Mary Vitt
  - 3. Superintendent: Nick Bryll
  - 4. Route Technician: Jason Navarro
- b. Modernization Sales & Operations Team for the Chicago-land area:
  - 1. General Manager: Justin Wenthold
  - 2. Regional MOD Manager: James Vinci
  - 3. MOD Sales Rep: David Alexander
  - 4. MOD Project Manager: Sharon Bonfitto
  - 5. MOD Superintendent: Mark Bertola

**Experience & References:**

- a. Our local modernization team has extensive experience in the modernization of elevator & escalators in libraries, retail spaces & commercial office buildings, on applications ranging from 1200 foot per minute gearless high rise elevators to 2 stop low rise hydraulic units.
- b. 5 Completed Comparable Projects;
  - 1. Glen Ellyn Public Library
    - i. 400 Duane Street, Glen Ellyn, IL 60137
    - ii. Dawn Bussey – Director: email: [dawnbussey@gepl.org](mailto:dawnbussey@gepl.org), Phone: 630-469-0879
    - iii. Modernized 2 x 4 stop hydraulic elevators. Contract was executed in Q1 2022 and installation of both units began in Sept. 2022 and concluded in Jan. 2024.
  - 2. Vernon Area Public Library
    - i. 300 Olde Half Day Road, Lincolnshire, IL 60069
    - ii. Stephen Territo – Head of Operations: email: [sterrito@vapld.info](mailto:sterrito@vapld.info), Phone: 847-898-0080
    - iii. Modernized 1 x 2 stop hydraulic elevator. Contract was executed in June 2022, and installation ran from Feb – March 2023.
  - 3. Evanston Public Library
    - i. 1703 Orrington Ave, Evanston, IL 60201
    - ii. John Devaney – Manager: email: [jdevaney@cityofevanston.org](mailto:jdevaney@cityofevanston.org), Phone: 847-448-8622
    - iii. Modernized 1 x 4 stop & 1 x 6 stop hydraulic elevators. Contract was executed in Jan. 2021, and installation ran from Jan – April 2022.
  - 4. Northbrook Junior High
    - i. 1475 Maple Ave, Northbrook, IL 60062



- ii. Joel Gallegos – Facilities Manager: email: [jgallegos@northbrook28.net](mailto:jgallegos@northbrook28.net), Phone: 847-770-8848
- iii. Modernized 1 x 3 stop hydraulic elevator. Contract was executed in Feb. 2023, and installation ran from July-August 2023.
- 5. Plainfield Central High School – Freshman Center Elevator
  - i. 24120 W Fort Beggs Dr, Plainfield, IL 60544
  - ii. Regina Kleckausk – Manager: Phone: 815-439-5483
  - iii. Modernized 1 x 3 stop hydraulic elevator. Contract was executed in July 2021, and installation ran from June – July 2022.

**Fee Structure:**

- 1. Modernization Price: \$164,433.00
- 2. Price for Related Work: \$86,432.00
- 3. Cab Interior Allowance: \$20,000.00
- 4. Total Price for Modernization: \$270,865.00
- 5. Labor Rate for Additional Work Outside of Scope: \$300/hr for Straight time, \$600/hr for overtime

## **ACKNOWLEDGEMENT OF ADDENDUM**

### **Addendum 2 to Request for Proposal for Elevator Upgrade/Modernization July 26, 2024**

This Addendum 2 to the Request for Proposal (RFP) for the Elevator Upgrade/Modernization is issued by Lake Forest Library through the Library's website.

All prospective bidders shall acknowledge receipt of this addendum by signing and submitting this addendum acknowledgement form. Failure to acknowledge receipt of the addendum may be cause for rejection of the RFP submission.

When submitting all Proposals, this Addendum Acknowledgment Form must be included in the Proposal submittal. The page will not be considered part of the 20 single-spaced page limit for Submissions.

This Addendum No. 2 consists of two (2) pages and has the following information to be incorporated into the Proposal submittal. The following are responses to the questions the Lake Forest Library received from prospective bidders:

**Question #1.** Is the total proposal limited to 20 single-spaced pages?

Answer: The base bid document should not exceed 20 single-spaced pages. Additional information such as brochures, product specifications, etc. can be added as a supplementary document.

**Question #2.** How might bidders mitigate the impact on daily library operations?

Answer: Parties discussed different options for working hours such as between 6 am – 2.30 pm; 7 am – 3.30 pm and 8 am – 4.30 pm. Bidders are encouraged to review the schedule of upcoming library events and programs available at [Upcoming Events | Lake Forest Library](https://www.lakeforestlibrary.org/upcoming-events)

Bidders should provide two proposals – one for a 5-day work week, and an alternate for working an additional day in the week to expedite the project.

**Question #3.** What is a good staging area to store equipment and supplies?

Answer: The expansion area in the Youth Services area (southeast part of the lower level).

**Question #4.** How can we make the existing elevator more ADA accessible?

Answer: Parties noted that the current elevator is ADA accessible. While we might potentially gain about 6 inches in width, it is likely that we would lose about 8 inches in length. Consensus was that it would be not cost effective to modify the current elevator's size. Bidders are not required to provide an alternate bid for this purpose.

**Question #5.** How should bidders quote for the interior finishes in the upgraded/modernized elevator?

Answer: Bidders should provide the interior finish package as an allowance cost which assumes mid-level materials. Please provide examples of materials that would/could be within that allowance.

The full RFP is at: [Elevator Upgrade Modernization RFP June 19 2024.pdf](#)  
([lakeforestlibrary.org](#))

I hereby acknowledge receipt of this Addendum 2 to the above-referenced Request for Proposals.

Firm Name: Schindler Elevator Corporation

Contact Person: David Alexander

Address: 150 S Wacker Dr. Suite 3010

City: Chicago State: IL Zip 60606

Phone: (917) 217-6254 Email: david.alexander@schindler.com

Signature: David Alexander Date: 7/29/2024

# We Elevate... Knowledge

Schindler Backgrounder And  
Fact Sheet 2024



**Schindler**



## Existing Installations

24-hour Schindler Service programs are designed to provide expert maintenance of all brands of elevator and escalator equipment



## Modernizations

Schindler offers expert modernization on all brands of elevators and escalators



## New Installations

Schindler stocks approximately 50,000 parts of all manufacturers for immediate repairs and replacement





## Partnerships

We keep your building, your equipment, and your people moving—through all of life's experiences.



## Schindler Plan

Schindler Plan allows architects and specifiers to create customized drawings and specifications as well as three-dimensional BIM models for Schindler products at [www.schindlerplan.com](http://www.schindlerplan.com)



## Schindler Ahead

Digitally connected, smart solutions

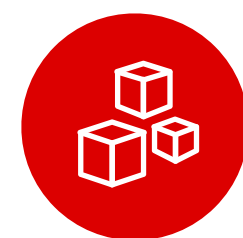




# Schindler Group



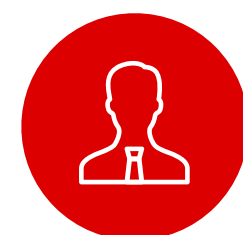
Founded in 1874 in Lucerne, Switzerland, by precision engineer Robert Schindler



A closely held company and is listed on the Swiss stock exchange



In 2022, Silvio Napoli was appointed Schindler Group's CEO in addition to his role as Chairman of the Board



Alfred N. Schindler stepped down as Chairman after 40 years on the Board of Directors, 26 of them as CEO and 22 as Chairman of the Board of Directors in March 2017



Employs over 69,000 people worldwide in 160 locations in more than 100 countries throughout Europe, North America, Asia-Pacific, Africa and South America



The company's world headquarters is located just outside of Lucerne, Switzerland





# Schindler Products

Marketed in the U.S.



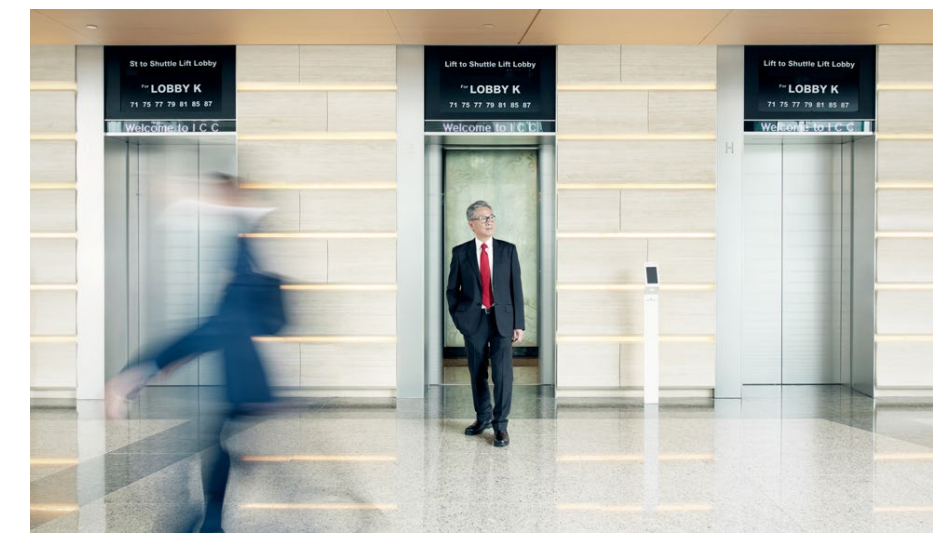
Schindler 330A

Schindler 330A hydraulic elevators for low-rise buildings



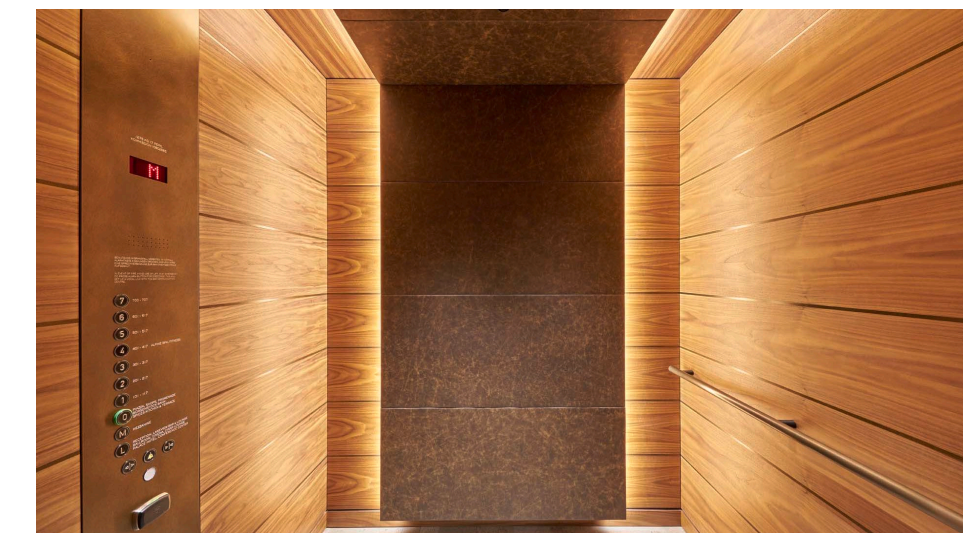
Schindler 3100

Schindler 3100 machine room-less traction elevators for low-rise buildings



Schindler 3300

Schindler 3300 machine room-less traction elevators for low- to mid-rise buildings



Schindler 3300XL

Schindler 3300XL machine room-less traction elevators with expanded options for low- to mid-rise buildings



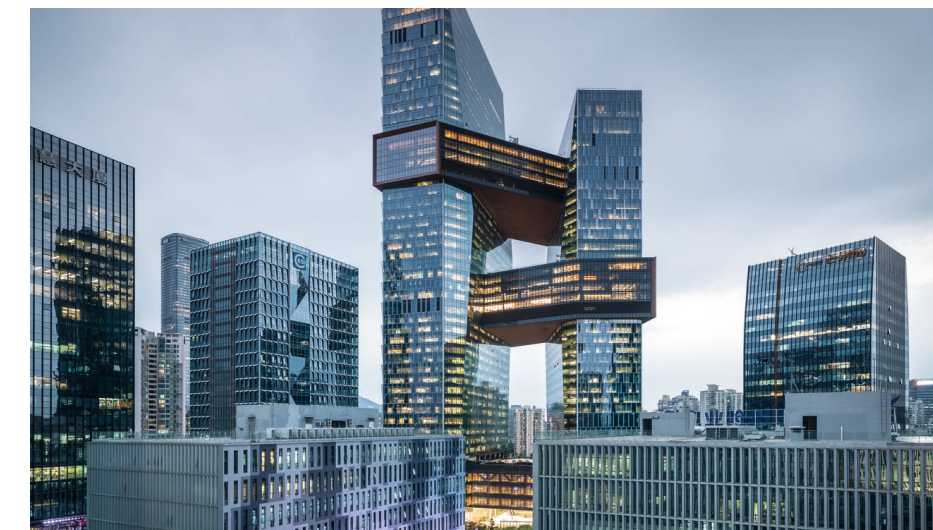
Schindler 5500

Schindler 5500 modular machine room-less traction elevator for mid-rise buildings



Schindler 6400

Schindler 6400 modernization solution for mid-rise buildings



Schindler 7000

Schindler 7000 top-of-the-range elevators for high-rise buildings



Schindler 9300

Schindler 9300 escalators for commercial and transit applications



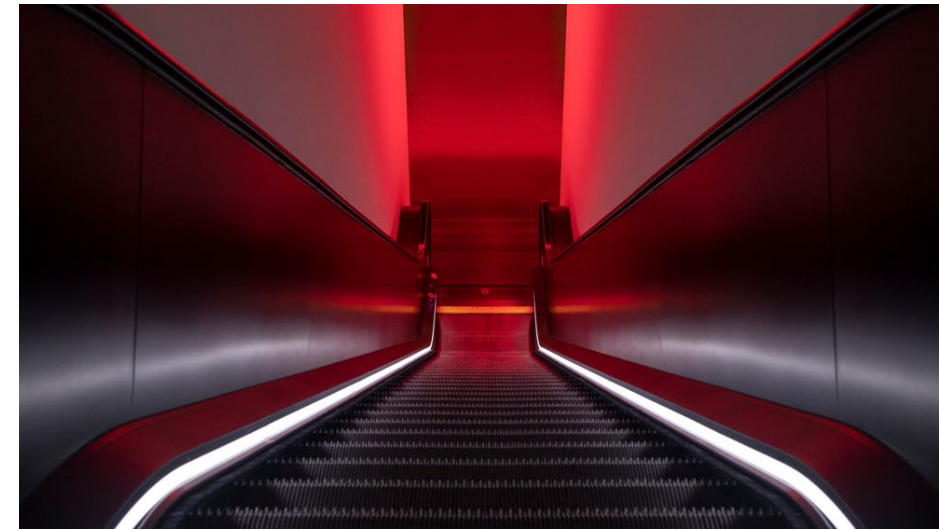
# Schindler Products

Marketed in the U.S.



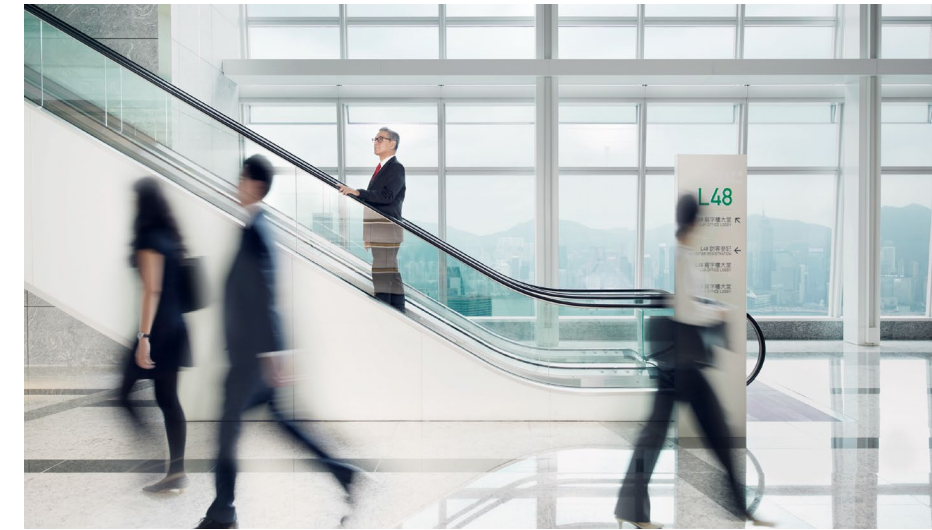
9500 Moving Walks

Schindler 9500 moving walks



InTruss

Schindler InTruss escalator modernization solution



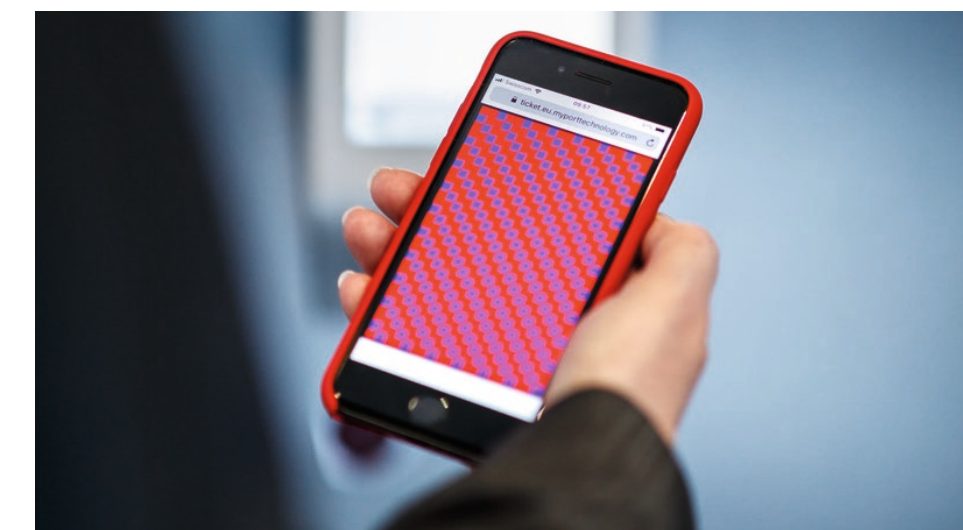
9700 Escalators

Schindler 9700 escalators for high-traffic public spaces



PORT Technology

Schindler's PORT Technology, intuitive third generation destination dispatch technology, optimizes traffic flow throughout a building while personalizing service and access control



myPORT

Schindler's myPORT, a unique smartphone-based service for personal mobility, providing building owners, managers, tenants and visitors with real-time information and convenience

# U.S. Operations

6,500

EMPLOYEES

Employing more than 6,000 people in  
North American locations

1979

OHIO

Established in Toledo, Ohio, in 1979

1989

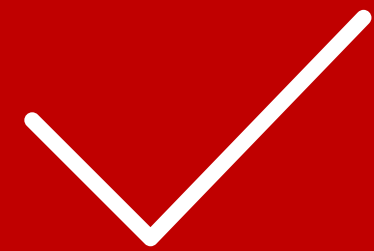
MORRISTOWN

Headquarters moved to Morristown,  
N.J. upon acquisition of the elevator and  
escalator business Westinghouse Electric  
Corporation in 1989

U.S. manufacturing plants  
in Hanover, P.A. and  
Clinton, N.C.

Schindler Elevator Corporation is the North American  
operating entity of the Switzerland-based Schindler  
Group, one of the leading global manufacturers of  
elevators, escalators and moving walks

# Schindler Quality



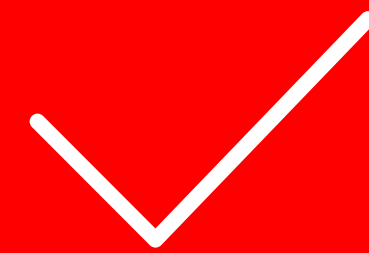
## Quality MANAGEMENT

Schindler was the first elevator company in the United States to achieve ISO 9001 quality management system certification for its manufacturing plants



## First In Any US INDUSTRY

Schindler's service organization was among the first in any US industry to receive ISO 9001 certification



## New, More Stringent ISO 9001

Schindler's operations in the US are certified to meet the new, more stringent ISO 9001:2015 requirements



## Internationally **RECOGNIZED**

Schindler's US headquarters, its Center for Service Excellence, and its manufacturing facilities achieved certification to the internationally recognized environmental management system standard ISO 14001:1996 and renewal certification to ISO 14001:2015.



# Notable U.S. Buildings

Using Schindler Products

● **4 World Trade Center**

New York City

● **Rockefeller Center**

New York City

● **Marriot Marquis Hotel**

New York City

● **Prudential Center**

Newark, New Jersey

● **Salesforce Tower**

San Francisco, California

● **Marlins Park**

Miami, Florida

● **Tampa Intl. Airport**

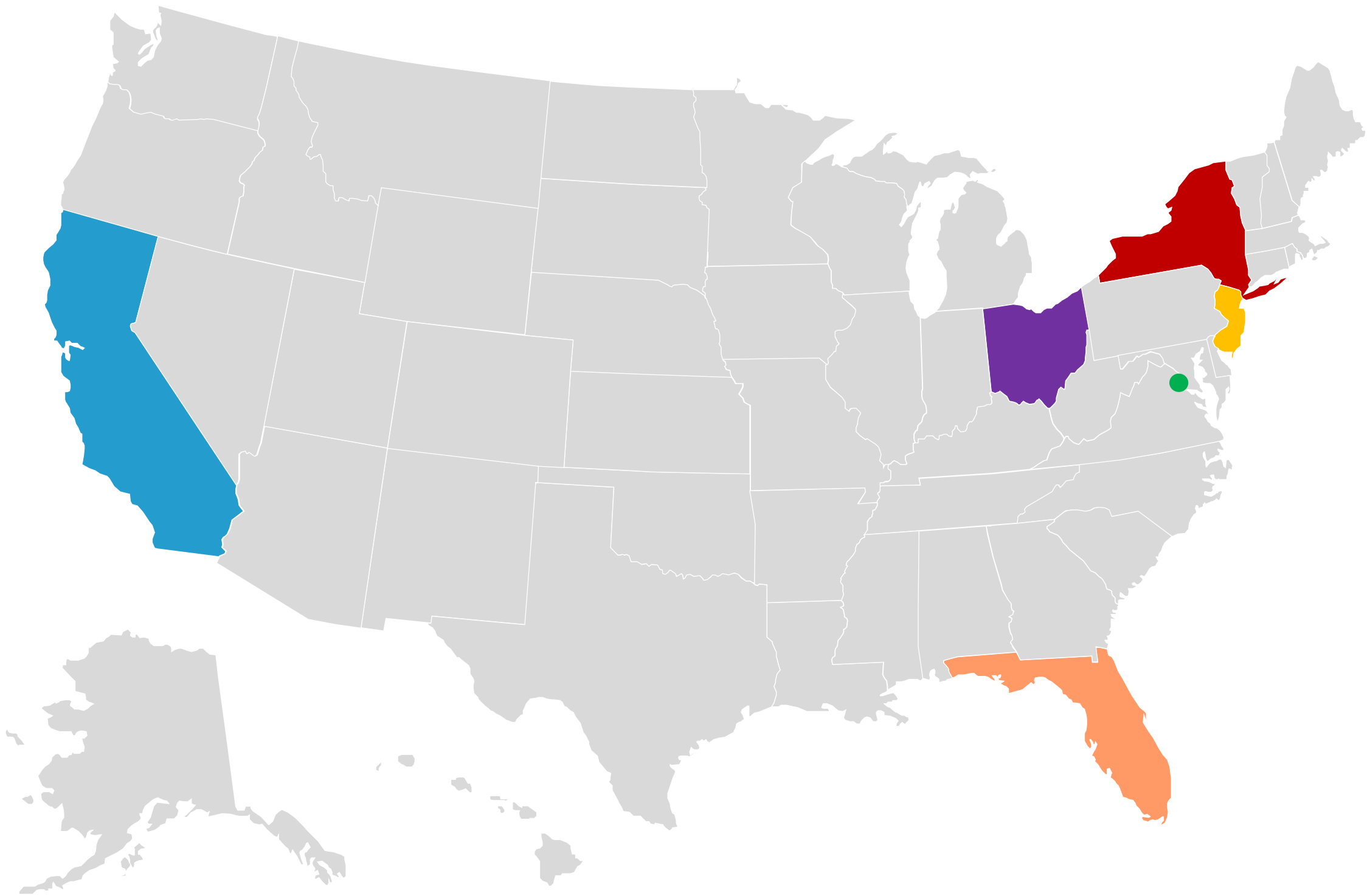
Tampa, Florida

● **Rock & Roll Hall of Fame**

Cleveland, Ohio

● **The White House**

Washington, D.C.



# Schindler

## Historic Milestones

1874

### Schindler & Villiger

Robert Schindler and Eduard Villiger establish the collective joint partnership Schindler & Villiger

1892

### Machinery Manufacturer

Eduard Villiger leaves the partnership. The company continues under the name of Robert Schindler, Machinery Manufacturer

1909

### Variable-Speed

Schindler Group introduces first variable-speed electric elevators

1929

### Operator-Free

Westinghouse installs first operator-free elevator

# Schindler

## Historic Milestones

1940

### Deck-Edge Elevators

Westinghouse installs deck-edge elevators on aircraft carriers, which can transport airplanes to the flight deck in a matter of seconds

1952

### Electronic Elevator Controls

Schindler Group introduces first electronic elevator controls

1961

### Solid-State Elevator Controls

Schindler Group introduces first solid-state elevator controls

1979

### Haughton Elevators

Schindler Group acquires Haughton Elevator Division, Toledo, Ohio (Reliance Electric, Cleveland, Ohio) and establishes Schindler Haughton Elevator Corporation in Toledo, Ohio

# Schindler

## Historic Milestones

1979

### Microprocessor Technology

Schindler Group pioneers microprocessor elevator technology

1989

### Schindler Holding AG

Schindler Holding AG takes over the entire elevator and escalator business of Westinghouse Electric Corporation and quadruples its presence in North America

1990

### Millar Elevator Service

Millar Elevator Service Company, the first nationwide company devoted to service and modernization, formed

1996

### Miconic 10

Revolutionary Miconic 10 elevator system launched

# Schindler

## Historic Milestones

2000

### Synthetic Elevator Rope

Schindler Group introduces  
first fully synthetic elevator  
rope, Aramid

2002

### Schindler and Millar

Schindler and Millar  
consolidate operations in  
North America

2003

### Schindler ID

Schindler Group launches  
Schindler ID, cutting edge  
traffic-management and  
access- control technology

2004

### Service Excellence

Center for Service Excellence  
established in Holland, Ohio  
(national service support  
center)



# Schindler

## Historic Milestones

2004

### Schindler 9300 Escalator

Schindler Group introduces the Schindler 9300 Advanced Edition escalator

2006

### Schindler Group

Schindler Group launches its new corporate identity to reflect the Group's evolution into a global service company.

2008

### Schindler Moves

Schindler moves 900 million people per day worldwide, based on its expanding service portfolio (elevators and escalators maintained by the Group's companies).

2009

### PORT Technology

Schindler introduces its third-generation destination dispatch technology, The PORT Technology.

# Schindler

## Historic Milestones

2010

### Schindler Moves

Schindler moves 1 billion people per day worldwide.

2011

### Schindler 3300 MRL Elevator

Schindler launches the Schindler 3300 MRL elevator in the United States and Canada.

2011-2013

### Clean Mobility

Schindler pioneered clean mobility technology by partnering with Solar Impulse, an airplane propelled only on solar energy.

2014

### LEED Gold

Schindler opens a state-of-the-art manufacturing in Hanover, Pa, the first elevator manufacturing facility in North America to achieve LEED Gold certification from the U.S. Green Building Council.

# Schindler

## Historic Milestones

2014

### **MyPORT**

Schindler launches MyPORT, the world's first app using smartphones to provide access to buildings and assign elevators to passengers.

2015

### **Schindler 5500 MRL Elevator**

Schindler introduces the Schindler 5500 MRL modular passenger elevator in the United States and Canada.

2015

### **Schindler Plan**

Schindler introduces online planning and design tool, Schindler Plan.

2017

### **Achievements**

Schindler InTruss escalator modernization selected as Architectural Record's 2017 Editors' Choice Winner.

# Schindler

## Historic Milestones

2017

### **Schindler Ahead**

Schindler Ahead includes the CUBE, Ahead ActionBoard, FieldLink and Elevated Support Professional (ESPs). The Schindler Ahead range of products ensures that you are ready for the future and have active communication in a closed loop information system.

2019

### **Schindler 3100 MRL Elevator**

Schindler 3100 recognized as one of Buildings Magazine's money saving products that contributes to LEED certification.

2020

### **Schindler Technical Operations Center**

Schindler opens dedicated TOC in Holland, OH, providing real-time support from Schindler's Elevated Support Professional (ESPs).

2021

### **Schindler Business Service Center (BSC),**

Schindler opens BSC in Atlanta, GA, consolidating enterprise-level business operations for the US and Canada.

# Schindler Elevator Corporation

## Territory Organization Chart



Joseph Terc, **B09**



Blake Jolivette, **B07**



**Area West**  
Ed Frysinger, SVP



**Area Central**  
Jennifer Bowen, SVP



**Area East**  
Phil Harty, SVP



**NY Metropolitan Area**  
Mike Chatterton, SVP



Walt Czekaj, **B06**



Bryan Budnik, **B02**



Paul Zhgilov, **B03**



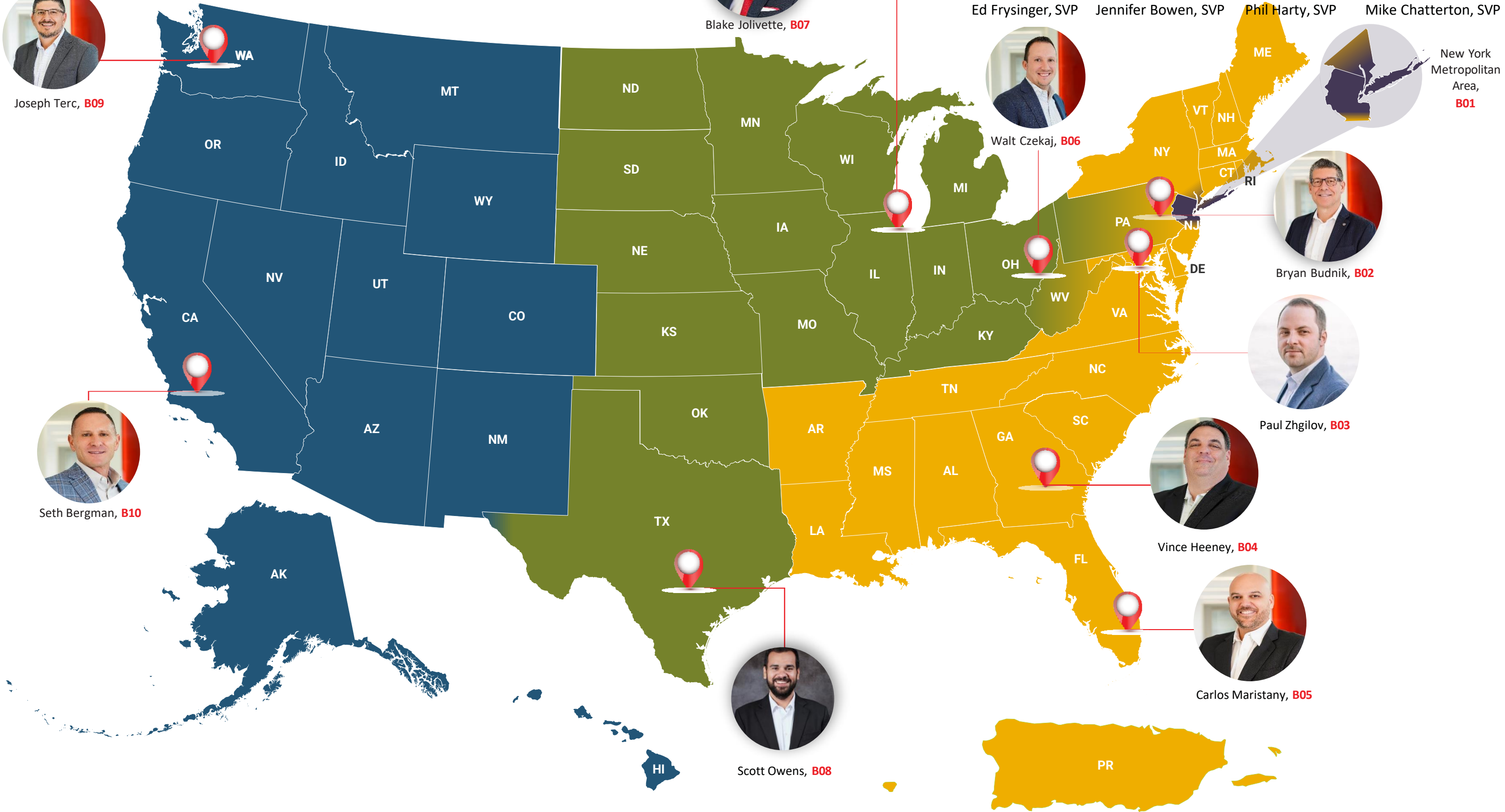
Vince Heeney, **B04**



Carlos Maristany, **B05**



Scott Owens, **B08**



# Segmentation of Districts by Territories

## District Allocation to 4 Areas and 10 Territories

### Area West (A04)

B09 Seattle	D42 – ELTECH	D52 – Denver
	D46 – Salt Lake City	D83 – Seattle
	D47 – Seattle LPD	D86 – Portland
	D49 – Boise	D87 – Las Vegas

B10 California	D78 – Republic	D84 – Honolulu
	D79 – LA Transit	D85 – Irvine
	D80 – Sacramento	D88 – Phoenix
	D81 – San Francisco	D89 – San Diego
	D82 – Los Angeles	

### New York Metropolitan Area (A01)

B01 New York	D01 – NYC MOD	D05 – NYC EI
	D02 – Long Island	D08 – NYC NI LPD
	D03 – North Jersey	
	D04 – NYC NI	

### Area Central (A03)

B06 Pittsburgh	D10 – Upstate Michigan	D20 – Toledo
	D14 – Cincinnati	D24 – Pittsburgh
	D17 – Detroit	D25 – Cleveland
	D18 – Indianapolis	D27 – Columbus

B07 Chicago	D11 – Milwaukee	D19 – Chicago Dntn
	D12 – Madison	D40 – Chicago NI
	D13 – Des Moines	D41 – Suburban
	D15 – Chicago Subs	D59 – St. Louis
	D16 – Minneapolis	

B08 Texas	D51 – Dallas	D57 – Wichita
	D53 – Houston	D58 – Kansas City
	D55 – San Antonio	D60 – Austin
	D56 – Tulsa	

### Area East (A02)

B02 New England	D22 – Hartford	D29 – Buffalo
	D23 – Boston	D31 – Allentown
	D26 – Albany	D36 – Philadelphia
	D28 – Syracuse	

B03 Washington	D30 – DC NI / MOD	
	D32 – DC EI	
	D33 – Richmond	
	D39 – Baltimore	

B04 Atlanta	D34 – Charlotte	D61 – Atlanta
	D38 – Raleigh	D63 – Memphis
	D48 – Shreveport	D67 – Birmingham
	D54 – New Orleans	D72 – Nashville

B05 Florida	D62 – San Juan	D71 – Miami-Dade County
	D64 – Orlando	D73 – Jacksonville
	D66 – Miami	
	D68 – Tampa	





# Schindler Plus

**Date: August 12, 2024**

**Prepared For:**

**Lake Forest Library  
360 E Deerpath Rd  
Lake Forest, IL 60045-2252**



**Date:** August 12, 2024

**Estimate Number:** TSAN-D83Q3H (2024.3.1)

**To:**  
Lake Forest Library  
360 E Deerpath Rd  
Lake Forest, IL 60045-  
2252  
Attn: Ishwar  
Laxminarayan

**Building Name:**  
Lake Forest Library

**From:**  
500 Park Boulevard  
Suite 750  
Itasca, IL 60143  
Phone:  
Fax: 630-478-7184

## EQUIPMENT DESCRIPTION

Qty	Manufacturer	Equipment	Application Description	Rise/Length	Capacity	Speed	Install#
				Openings			
1	Schindler	Hydraulic Passenger	ELEV 01	3F/1R	2500	150	

**SCHINDLER ELEVATOR CORPORATION** ("Schindler", "we", "us") and **LAKE FOREST LIBRARY** ("you") agree as follows:

## PREVENTIVE MAINTENANCE PROGRAM

Schindler shall furnish Preventative Maintenance at a frequency either determined by the applicable Authority Having Jurisdiction (AHJ) for this location at the time of original commencement, or if no such local requirements exist, in accordance with ASME A17.1. Schindler has developed Maintenance Control Programs (MCPs) for each relevant Equipment type, which meet and exceed ASME code requirements. Our MCPs incorporate tasks, task description, relevant ASME A17.1 code references, and planned performance intervals. These tasks will be completed by a trained Schindler technician. All completed tasks are recorded digitally and are accessible to you, for reference purposes, on our Schindler ActionBoard (web portal).

We will examine, lubricate, and adjust, the Covered Components listed below:

## HYDRAULIC ELEVATORS

### Basic components:

- **Controller Equipment**
  - Resistors, timers, fuses, overload switches, minor contacts, wiring, and coils
- **Car Equipment**
  - Guide shoe inserts or roller assemblies, loadweighing devices, and car safety devices
- **Door Equipment**
  - Door operating devices, door protection devices, hangers, closers, interlocks, contacts, and gibs
- **Hoistway and Pit Equipment**
  - Limit switches and buffer(s)
- **Signals and Accessories**
  - Car operating panels, hall stations, in-car and hall lanterns, and their applicable buttons, keyswitches, and bells; signal lamps shall be replaced during regular visits only unless a service request is initiated, in which case that request shall be billable at our standard billing rates



## Major components:

- **Controller Equipment**
  - Solid state devices, contactors, and PC boards
- **Hydraulic System Equipment**
  - Exposed piping and connections, pumps, motors, and valves
- **Hoistway and Pit Equipment**
  - Exposed piping and connections, above ground hydraulic cylinders, and packings
- **Additional Items**
  - Traveling cables and other miscellaneous wiring

## CLEANING

As conditions or ASME code dictate, Schindler shall clean the machine room, car top, and pit of debris related to our work in these areas.

## CALLBACK COVERAGE

Service dispatching will take place through our Schindler Customer Service Network (SCSN), which is staffed by qualified Schindler personnel, 24/7. You will be provided with a customer identification number, which must be referenced when a call is placed for your facility. Our dispatchers will have access to your building's service call records, and will promptly relay the details of your call to the assigned technician.

Schindler shall provide emergency minor adjustment callbacks during regular working hours, including all calls received prior to 3:30 p.m. local time. If you authorize callbacks outside regular working hours, you will pay us at our standard billing rates, plus materials not covered by contract, expenses and travel. All other work outside the services will be billed at our standard billing rates. A request for service will be considered an "emergency minor adjustment callback" if it is to correct a malfunction or adjust the equipment and requires immediate attention and is not caused by misuse, abuse or other factors beyond our control. The term does not include any correction or adjustment that requires more than one technician or more than two hours to complete.

## REPAIRS

As conditions, usage, or as ASME code dictate, Schindler shall repair or replace the Covered Components. Replacements for the Covered Components are available either at a local Schindler location, at our national Service Distribution Center, or within our network of Schindler approved, third-party suppliers.

## TESTING OF SAFETY DEVICES

<u>Equipment</u>	<u>Test</u>	<u>Frequency</u>
Hydraulic	Pressure/Relief Valve	Annually

Our testing responsibilities do not include fees or changes imposed by local authorities in conjunction with witnessing, witnessing costs, inspecting, assisting inspection authorities, licensing or testing the Equipment including observation of testing by 3rd parties; changes in the testing requirements after the initial start date of this Agreement, or any other testing obligations other than as specifically set forth above, including, but not limited to seismic tests. Since these tests may expose the equipment to strains well in excess of those experienced during normal operation, Schindler will not be responsible for any damage to the equipment or property, or injury to or death of any persons, resulting from or arising out of the performance of these tests. Further, our testing responsibilities do not include performance, or the keeping of records related to, monthly firefighters service.

## HOURS OF SERVICE

Unless otherwise noted above, all work shall be completed during our regular working hours of regular working days, excluding elevator trade holidays.



## SCHINDLER AHEAD

Schindler Ahead is a digital closed-loop system which, via a dedicated wireless cellular signal, provides remote connectivity between your Equipment and Schindler, allowing us to be notified 24/7 if any connected component or function is operating outside established parameters. Schindler Ahead can help improve your Equipment reliability, provide you with deeper insights, superior convenience, and greater cost control.

Your contract includes the above features as well as the following Core package:

**Connect** – The Connect package includes 24/7 monitoring of your Equipment, which allows for real-time visibility of Equipment operating status, and select operating parameters, on the Schindler ActionBoard (web portal) and ActionBoard Mobile (phone application) platforms. Performance history, reliability data, and many other customizable reports and features, are available on the ActionBoard platforms.

If you would like information on upgrading your Core package, please discuss with your sales rep. The upgraded packages are:

**Enhanced** – The Enhanced package includes 24/7 monitoring of your Equipment, which allows for real-time visibility of Equipment operating status, and select operating parameters, on the Schindler ActionBoard (web portal) and ActionBoard Mobile (phone application) platforms. Performance history, reliability data, and many other customizable reports and features, are available on the ActionBoard platforms. Additionally, Enhanced customers receive access to Schindler's Elevated Support Professional (ESP) Team. This team analyzes information gathered by Schindler Ahead, which can help reduce equipment downtime in a shutdown situation by performing advanced troubleshooting and can help improve equipment reliability in non-shutdown situations, by scheduling future maintenance on components necessitating it. When appropriate, the ESP Team will communicate with you to schedule service calls. With these enhanced diagnostics, we can guarantee that you will not be charged for Running on Arrival (ROA) calls. Schindler will fully cover the cost of any callback during regular hours related to the following situations: Elevator or Escalator Running in normal operation or running under any of the following special services modes: Independent service, Fireman's service (Phase I or Phase II), or Inspection operation. All other callbacks will be billed as outlined in the agreement.

**Premium** – The premium package is our top tier, and was created for customers requiring the most comprehensive level of service. Our premium package offers the highest level of functionality and support. The Premium tier also includes concierge level assistance for all of your service needs.

The following digital services are also available:

**SafeCall** – The Schindler Ahead in-car emergency phone service will be added to your digital package. This service includes a cellular connection between your elevator's in-car emergency phone and our Schindler Customer Service Network (SCSN), that handles incoming and outgoing emergency calls with passengers in the elevator. To ensure reliability, Schindler Ahead phone service also provides monitoring of this connection. The availability of this service is contingent upon code approval by the local Authority Having Jurisdiction (AHJ) and having a non-proprietary in-car emergency phone. If selected, please await confirmation of the activation of the service prior to terminating your existing dedicated phone line, to avoid a disruption in service.

SafeCall has been added at a cost of \$30 per unit, per month and is reflected in the Price section below

**Visual Alarm Module (VAM) Monitoring** – In areas where the local Authority Having Jurisdiction (AHJ) has adopted ASME A17.1-2019 code regarding communication systems for the hearing and speech impaired, Schindler shall provide voice, audio, and text-based communications to the elevator cab. This code requirement is in supplement to the elevator's in-car emergency phone. To enable this service, the necessary hardware to enable communication must be installed, which is subject to an additional one-time charge, if not already present.



\_\_\_\_\_ Initial Here to add VAM Monitoring for \$35 per unit, per month in addition to the subscription price shown in the Price section below

The necessary hardware to activate Schindler Ahead Core Services will be installed and activated at no additional cost, in exchange for a 60 month contract term. By signing this contract, you agree to the term described herein. Should you terminate the contract early in accordance with the cancellation terms, you agree to pay the costs associated with the activation of the Schindler Ahead hardware, up to \$1,500.00 per unit. Work shall be performed during our regular working hours of our regular working days. Title to Hardware remains with Schindler. Schindler may replace or modify Hardware at any time. Customer shall promptly provide Schindler access to Hardware and prevent unauthorized access thereto.

## **EXCLUSIONS**

We assume no responsibility for the following items: hoistway door hinges, panels, frames, gates and sills; cabs and cab flooring; freight elevator door straps, cab doors, gates and removable cab panels; cab mirrors and handrails; power switches, fuses and feeders to controllers; emergency cab lighting; light fixtures and lamps; cover plates for signal fixtures and operating stations; card readers or other access control devices; smoke/fire alarms and detectors; pit pumps and alarms; cleaning of cab interiors and exposed sills; below ground or unexposed plungers, pistons, casings and cylinders; automatic ejection systems; all piping and connections except that portion which is exposed in the machine room and hoistway; guide rails; tank; emergency power generators; telephone service, communication devices; replacement and disposal of hydraulic oil; intercom or music systems; ventilators, air conditioners or heaters; adverse elevator operation as a result of machine room temperatures (including temperature variations below 60 degrees Fahrenheit and above 90 degrees Fahrenheit); media displays; computer consoles or keyboards; fireman's phones; exterior panels, skirt and deck panels, balustrades, relamping of illuminated balustrades; attachments to skirts, decking or balustrades; moving walk belts; pallets; steps; skirt brushes; sideplate devices; any batteries associated with the equipment. In the event that safety testing is performed by us at the start of the Agreement, and we find that critical safety components, such as the governor and/or safeties for traction equipment, or valves on hydraulic equipment, are not operating correctly, resulting in unsafe conditions, you will be responsible to authorize the necessary repairs/replacements of this equipment, at your expense.

During the term of the Agreement, parts or components may become obsolete. An obsolescence designation shall apply to any of the following scenarios:

- Part or component is no longer in stock and available for purchase from the Original Equipment Manufacturer (OEM)
- Part, component, or equipment was originally installed 20 or more years ago
- Motor Generators

The costs associated with the repair (including refabrication), or replacement, of obsolete parts or components are excluded from this Agreement. Schindler will provide a written proposal for the excluded work. Any repaired part or component will continue to be considered obsolete. If replacement is required, Schindler shall present a written proposal to replace the obsolete part(s) or component(s), including the costs of any associated modifications which may be necessary to interface with a part or component of a different design, to ensure proper and safe operation of the equipment. Once replaced, the new part or component will be covered by this Agreement.

## **TERM**

This Agreement commences on September 01, 2024, and continues until August 31, 2029, and shall renew (where permitted by applicable local law) for subsequent similar periods, unless terminated by either party upon written notice received by the other party at least 90 days prior to the above termination date or any renewal termination date, and not more than 120 days before the termination date.



## PRICE

In consideration of the services provided hereunder, you agree to pay us the sum of \$245.00 per month, payable annually in advance (\$2,940.00 per installment), exclusive of applicable taxes, unless another payment option is accepted below:

Payment Option	Revised Monthly Price	Acceptance (Initial)
Annual in Advance	\$245.00	
Semi-Annual in Advance	\$249.90	
Quarterly in Advance	\$254.80	
Monthly in Advance	\$259.70	

The pricing above includes a subscription price of \$15 per month for Schindler Ahead Connect on 1 unit, and a SafeCall price of \$30 per month for 1 unit, totaling \$45.00 per month, which will commence upon activation of Schindler Ahead services. If you would like to upgrade your Schindler Ahead tier, please indicate by checking below:

☐ Upgrade to the Enhanced Package - \$10 per unit, per month addition.

The standard method of invoice delivery shall be by email. Please provide the applicable email address in the Bill To section of the Customer Information section in this document. You agree to immediately update us with any changes to the electronic invoicing address. If you require paper invoices, they shall be subject to a paper invoice administration fee.

Method of payment shall be by check, unless another option is selected below:

☐ Direct Debit (Attach copy of voided check)

☐ Credit Card (Complete "Other" section within included Customer Information Sheet)

## PRICE ADJUSTMENT

The contract Price and labor rates for extra work will be adjusted annually in January. This adjustment will be based upon the local labor rate adjustment for the year in which it is adjusted, and will be increased or decreased on the basis of changes to the local straight time hourly rate for mechanics. If there is a delay in determining a new labor rate, or an interim determination of a new labor rate, we will notify you and adjust the price at the time of such determination, and we will retroactively bill or issue credit, as appropriate, for the period of such delay. We also reserve the right to adjust the contract price quarterly / annually on the basis of changes in other expenses such as fuel, waste disposal, government regulations or administrative costs. Should you elect to take the annual pre-payment option, the price adjustment date will default to coincide with the invoice date.

The annual contract price adjustment will not apply to Schindler Ahead. Schindler reserves the right to make adjustments to the monthly fee for the Schindler Ahead tiers as additional value added features and functionality are added to the selected offering.



**The attached terms and conditions** are incorporated herein by reference.

Acceptance by you as owner's agent or authorized representative and subsequent approval by our authorized representative will be required to validate this agreement.

Proposed:

\_\_\_\_\_

By: Mary Vitt

For: Schindler Elevator Corporation

Title: Sales Representative

Date: August 12, 2024

Accepted:

\_\_\_\_\_

By: \_\_\_\_\_

For: Lake Forest Library

Title: \_\_\_\_\_

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

Approved:

\_\_\_\_\_

By: Brandon Buettner

Title: General Manager

Date: August 12, 2024



## CUSTOMER INFORMATION

### Owner / Manager Information

Legal Name of Company:		
Address:		
City:	State:	Zip:
Federal Tax ID #:	Tax Exempt? (if Yes, provide Certificate)	

Primary Contact Name:	Title:
Email:	Phone:

### Bill To Information

Legal Name of Company:		
Address:		
City:	State:	Zip:
Purchase Order? (if Yes, provide applicable Number)		
Bill To Email #1 (required):		
Bill To Email #2 (optional):		

Accounts Payable Contact Name:	
Email:	Phone:

### Other (if applicable)

Credit Card:	<input type="checkbox"/> VISA	<input type="checkbox"/> MC	<input type="checkbox"/> AMEX
Name:			
Number:			
Expiration:		Billing Zip:	
Signature:			

## TERMS AND CONDITIONS

1. This is the entire Agreement between us, and no other terms or conditions shall apply. This service proposal does not void or negate the terms and conditions of any existing service agreement unless fully executed by both parties. No services or work other than specifically set forth herein are included or intended by this Agreement.

2. You retain your responsibilities as Owner and/or Manager of the premises and of the Equipment. You will provide us with clear and safe access to the Equipment and a safe workplace for our employees as well as a safe storage location for parts and other materials to be stored on site which remain our property, in compliance with all applicable regulations related thereto, you will inspect and observe the condition of the Equipment and workplace and you will promptly report potentially hazardous conditions and malfunctions, and you will call for service as required; you will promptly authorize needed repairs or replacements outside the scope of this Agreement, and observe all testing and reporting responsibilities based upon local codes. You will not permit others to work on the Equipment during the term of this Agreement. You agree that you will authorize and pay for any proposed pre-maintenance repairs or upgrades (including any such repairs or upgrades proposed during the first 90 days of this agreement), or we will have the option to terminate this Agreement immediately, without penalty to us. You agreed to post and maintain necessary instructions and / or warnings relating to the equipment.

3. We will not be liable for damages of any kind, whether in contract or in tort, or otherwise, in excess of the annual price of this Agreement. We will not be liable in any event for special, indirect or consequential damages, which include but are not limited to loss of rents, revenues, profit, good will, or use of Equipment or property, or business interruption.

4. Neither party shall be responsible for any loss, damage, detention or delay caused by labor trouble or disputes, strikes, lockouts, fire, explosion, theft, lightning, wind storm, earthquake, floods, epidemics, pandemics, storms, riot, civil commotion, malicious mischief, embargoes, shortages of materials or workmen, unavailability of material from usual sources, government priorities or requests or demands of the National Defense Program, civil or military authority, war, insurrection, failure to act on the part of either party's suppliers or subcontractors, orders or instructions of any federal, state, or municipal government or any department or agency thereof, acts of God, or by any other cause beyond the reasonable control of either party. Dates for the performance or completion of the work shall be extended by such delay of time as may be reasonably necessary to compensate for the delay.

5. You will assign this Agreement to your successor in interest, should your interest in the premises cease prior to the initial or any renewal termination date. If this Agreement is terminated prematurely for any reason, other than our default, including failure to assign to a successor in interest as required above, you will pay as liquidated damages (but not penalty) one-half of the remaining amount due under this Agreement.

In the event you decline the automatic renewal, this Agreement shall continue on a month-to-month basis following the termination date, unless terminated by either party in accordance with the above provisions. Schindler will not be responsible for the repair or replacement of any Covered Major Components during renewal periods of less than twelve (12) months.

6. The Equipment consists of mechanical and electrical devices subject to wear and tear, deterioration, obsolescence and possible malfunction as a result of causes beyond our control. The services do not guarantee against failure or malfunction, but are intended to reduce wear and prolong useful life of the Equipment. We are not required to perform tests other than those specified previously, to install new devices on the equipment which may be recommended or directed by insurance companies, federal, state, municipal or other authorities, to make changes or modifications in design, or to make any replacements with parts of a different design. We are responsible to perform such work as is required due to ordinary wear and tear. We are not responsible for any work required, or any claims, liabilities or damages, due to: obsolescence; accident; abuse; misuse; vandalism; adverse machine room conditions (including temperature variations below 60 degrees and above 90 degrees Fahrenheit) or excessive humidity; overloading or overcrowding of the Equipment beyond the limits of the applicable codes; use of a stopped escalator as a stair; adverse environmental or premises conditions, including but not limited to water damage, power fluctuations, rust, or any other cause beyond our control. We will not be responsible for correction of outstanding violations or test requirements cited by appropriate authorities prior to the effective date of this agreement.

7. Invoices (including invoices for extra work outside the fixed price) will be paid upon presentation, on or before the last day of the month prior to the billing period. Late or non-payments will result in:

- (a) Interest on past due amounts at 1½% per month or the highest legal rate available;
- (b) Termination of the Agreement on ten (10) days prior written notice; and
- (c) Attorneys' fees, cost of collection and all other appropriate remedies for breach of contract.

Should we be required to interface with any third-party billing or management systems, we reserve the right to modify the Agreement price to account for additional costs incurred by Schindler.

8. If either party to this Agreement claims default by the other, written notice of at least 30 days shall be provided, specifically describing the default. If cure of the default is not commenced within the thirty-day notification period, this Agreement may be terminated. In the event of litigation, the prevailing party will be entitled to its reasonable attorneys' fees and costs. If you elect to modernize any or all of the Equipment during the term of this agreement, you will give us the option, within a reasonable time, to prepare an offer for the work and/or evaluate competitor proposals and compare scope of work and price. If we are unable to match price and scope of work, or present an alternative proposal, this Agreement may be canceled with ninety (90) days written notice.



**Schindler**

9. Any proprietary material, information, data or devices contained in the equipment or work provided hereunder, or any component or feature thereof, remains our property. This includes, but is not limited to, any tools, devices, manuals, software, modems, source/ access/ object codes, passwords. In the event Schindler's maintenance obligation is terminated, the Schindler Ahead features ("SA") (if applicable) will be deactivated and Schindler reserves the right to remove the Schindler Ahead hardware. If Schindler is no longer the maintenance provider, Customer is responsible for obtaining alternative telephone service for the elevator phones.

10. You will prevent access to the Equipment, including the SA feature and/or dedicated telephone line if applicable, by anyone other than us. We will not be responsible for any claims, losses, demands, lawsuits, judgment, verdicts, awards or settlements ("claims") arising from the use or misuse of SA, if it or any portion of it has been modified, tampered with, misused or abused. We will not be responsible for use, misuse, or misinterpretation of the reports, calls, signals, alarms or other such SA output, nor for claims arising from acts or omissions of others in connection with SA or from interruptions of telephone service to SA regardless of cause. You agree, which obligation shall survive this Agreement, that you will defend, indemnify and hold us harmless from and against any such claims, and from any and all claims arising out of or in connection with this Agreement, and/or the Equipment, unless caused directly and solely by our established fault.

11. Should this Agreement be accepted by you in the form of a purchase order, the terms and conditions of this Agreement will take precedence over those of the purchase order.

12. Schindler Elevator Corporation is insured at all locations where it undertakes business for the type of insurance. You agree to accept, named as certificate holder, in full satisfaction of the insurance requirements for this Agreement, our standard Certificate of Insurance. Limits of liability as follows:

- (a) Workers' Compensation - Equal to or in excess of limits of Workers' Compensation laws in all states and the District of Columbia.
- (b) Comprehensive Liability - Up to Two Million Dollars (\$2,000,000.00) single limit per occurrence, Products/Completed Ops Aggregate \$5,000,000.
- (c) Auto Liability - \$5,000,000 CSL.
- (d) Employer's Liability - \$5,000,000 Each Accident/Employee/Policy Limit.





**15811 Annico Drive, Unit #5**  
**Homer Glen, IL 60491**  
**877/301-6510**  
*www.americanbeltmanlift.com*

August 1, 2024

LAKE FOREST LIBRARY  
360 East Deerpath Road  
Lake Forest, IL 60045

Re: Proposal for Elevator Modernization at Lake Forest Library, Lake Forest, Illinois.

## **MODERNIZATION**

The elevator modernization will be performed with the highest standards of the elevator industry. We will provide an elevator team for the project and will supplement this team with additional manpower (helper, repair team, engineering assistance) as required to ensure complete and proper work on the modernization project.

## **PROPOSED WORK PLAN**

In accordance with the Specification, it is our intention to provide elevator modernization on the following schedule:

- Five days a week for approximately five weeks or if approved six days a week for approximately four weeks.

## **PROJECT PERSONNEL**

For this project American Hoist & Manlift will assign the following personnel:

**Job Title:** Project Manager

**Name:** Jim Druffel

**Job Responsibility:** Supervision of the modernization project

**Contact Information:**

Cell Phone – (773) 350-2110

Email – [jdruffel@ahmelevator.com](mailto:jdruffel@ahmelevator.com)



**15811 Annico Drive, Unit #5**  
**Homer Glen, IL 60491**  
**877/301-6510**  
*www.americanbeltmanlift.com*

**Job Title:** Primary Modernization Mechanic

**Name:** Randy Paluszak

**Job Responsibility:** Actual day-to-day work of the modernization project.

**Contact Information:**

Cell Phone – (219) 951-2080

**Job Title:** Assistant Modernization Mechanic

**Name:** Jay Cooper

**Job Responsibility:** Actual day-to-day work of the modernization project.

**Contact Information:**

Cell Phone – (815) 603-6613

**Job Title:** Adjusting Mechanic

**Name:** Rich Parker

**Job Responsibility:** Adjusting the elevator for proper operation after new equipment is installed.

**Contact Information:**

Cell Phone – (773) 621-9874



**15811 Annico Drive, Unit #5**

**Homer Glen, IL 60491**

**877/301-6510**

*www.americanbeltmanlift.com*

August 1, 2024

LAKE FOREST LIBRARY  
360 East Deerpath  
Lake Forest, IL 60045

Re: Elevator Modernization Proposal – Regular Hours Monday thru Friday

Per our survey, we are submitting the following proposal for the elevator modernization on the passenger elevator.

**PROPOSAL:**

TO PROVIDE ALL LABOR AND MATERIAL TO MODERNIZE THE EXISTING PASSENGER ELEVATOR AND INSTALL THE FOLLOWING:

**CONTROLLER:** New Alpha Control microprocessor simplex elevator controls, floor selector, fire service feature and battery lowering

**NUMBER OF STOPS:** 4

**CAPACITY:** 1500 lbs.

**SPEED:** 100 fpm

**PUMPING UNIT:** New MEI submersible tank (including new valve, motor, shutoffs & muffler).

**HYDRAULIC OIL:** New

**CYLINDER & JACK:** Retain

**WIRING:** New traveling cable, hoistway and machine room wiring

**DOOR OPERATOR:** (2) GAL MOVFR II door operator, LWZ zone clutch, gate hangar rollers

**HATCH DOORS:** GAL hangar rollers, locks, pickup rollers, and keepers

**HOISTWAY SWITCHES:** New limit switches & pit stop switch.

**FIXTURES:** Innovation car operating panel, new digital position indicators, traveling lantern and new hall stations with fire service and access key switches

**CAR TOP INSPECTION STATION:** New station with 110VAC light & guard

**PROXIMITY EDGE:** New 2019 code compliant 3D proximity edge

**CAB:** New cab interior with a \$15,000 allowance cost.

**BUFFERS:** Re-use existing

**PIT LADDER:** New code compliant.

**MANUALS:** Electrical as built

**PERMIT:** City permit included

Our price for this work is **\$156,900.00.**



**15811 Annico Drive, Unit #5  
Homer Glen, IL 60491  
877/301-6510**

*www.americanbeltmanlift.com*

**Payment Terms:**

- Forty percent down payment
- Forty percent of the material being shipped.
- Balance due upon completion

**WORK NOT INCLUDED:**

- A dry pit reinforced to sustain vertical loads as shown.
- Any cutting and patching of building construction required installing signal fixtures, or other elevator apparatus, and any repairs, grouting, patching, or painting made necessary by it.
- A machine room properly lighted and ventilated per Code requirements with temperature maintained between 65 and 95 degrees. The door of size to permit access for hydraulic machine, to be self-closing and locking, but open able from inside without key.
- A fused disconnect switch for each elevator, of ample capacity, with wiring to the elevator motor starter control. Disconnecting means shall disconnect the normal power supply as well as emergency supply, when provided.
- Light and switch in elevator room, with switch located adjacent to access door. Convenience outlet in machine room.
- Light, switch, and convenience outlet in elevator pit, light switch accessible from lower landing opening. Install light to clear elevator car.
- Suitable 110 VAC service disconnects wired to terminals in elevator controller for car light service.
- Smoke sensors are in each elevator lobby with necessary wiring to elevator control panel when fire service is specified.
- Telephone instruments in elevator car and wiring from building source to elevator control panel.

If you should have any questions or require additional information, please do not hesitate to call.

**MODERNIZATION ACCEPTANCE:**

NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_



**15811 Annico Drive, Unit #5**  
**Homer Glen, IL 60491**  
**877/301-6510**  
*www.americanbeltmanlift.com*

August 1, 2024

LAKE FOREST LIBRARY  
360 East Deerpath  
Lake Forest, IL 60045

Re: Elevator Modernization Proposal – Regular Hours Monday thru Friday

Per our survey, we are submitting the following proposal for the elevator modernization on the passenger elevator.

**PROPOSAL:**

TO PROVIDE ALL LABOR AND MATERIAL TO MODERNIZE THE EXISITING PASSENGER ELEVATOR AND INSTALL THE FOLLOWING:

**CONTROLLER:** New Alpha Control microprocessor simplex elevator controls, floor selector, fire service feature and battery lowering

**NUMBER OF STOPS:** 4

**CAPACITY:** 1500 lbs.

**SPEED:** 100 fpm

**PUMPING UNIT:** New MEI submersible tank (including new valve, motor, shutoffs & muffler).

**HYDRAULIC OIL:** New

**CYLINDER & JACK:** Retain

**WIRING:** New traveling cable, hoistway and machine room wiring

**DOOR OPERATOR:** (2) GAL MOVFR II door operator, LWZ zone clutch, gate hangar rollers

**HATCH DOORS:** GAL hangar rollers, locks, pickup rollers, and keepers

**HOISTWAY SWITCHES:** New limit switches & pit stop switch.

**FIXTURES:** Innovation car operating panel, new digital position indicators, traveling lantern and new hall stations with fire service and access key switches

**CAR TOP INSPECTION STATION:** New station with 110VAC light & guard

**PROXIMITY EDGE:** New 2019 code compliant 3D proximity edge

**CAB:** New cab interior with a \$15,000 allowance cost.

**BUFFERS:** Re-use existing

**PIT LADDER:** New code compliant.

**MANUALS:** Electrical as built

**PERMIT:** City permit included

➤ **Work will consist of six days per week.**

Our price for this work is **\$167,600.00.**



**15811 Annico Drive, Unit #5**

**Homer Glen, IL 60491**

**877/301-6510**

*www.americanbeltmanlift.com*

**Payment Terms:**

- Forty percent down payment
- Forty percent of the material being shipped.
- Balance due upon completion

**WORK NOT INCLUDED:**

- A dry pit reinforced to sustain vertical loads as shown.
- Any cutting and patching of building construction required installing signal fixtures, or other elevator apparatus, and any repairs, grouting, patching, or painting made necessary by it.
- A machine room properly lighted and ventilated per Code requirements with temperature maintained between 65 and 95 degrees. The door of size to permit access for hydraulic machine, to be self-closing and locking, but open able from inside without key.
- A fused disconnect switch for each elevator, of ample capacity, with wiring to the elevator motor starter control. Disconnecting means shall disconnect the normal power supply as well as emergency supply, when provided.
- Light and switch in elevator room, with switch located adjacent to access door. Convenience outlet in machine room.
- Light, switch, and convenience outlet in elevator pit, light switch accessible from lower landing opening. Install light to clear elevator car.
- Suitable 110 VAC service disconnects wired to terminals in elevator controller for car light service.
- Smoke sensors are in each elevator lobby with necessary wiring to elevator control panel when fire service is specified.
- Telephone instruments in elevator car and wiring from building source to elevator control panel.

If you should have any questions or require additional information, please do not hesitate to call.

**MODERNIZATION ACCEPTANCE:**

NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_



## **ACKNOWLEDGEMENT OF ADDENDUM**

### **Addendum 2 to Request for Proposal for Elevator Upgrade/Modernization**

**July 26, 2024**

This Addendum 2 to the Request for Proposal (RFP) for the Elevator Upgrade/Modernization is issued by Lake Forest Library through the Library's website.

All prospective bidders shall acknowledge receipt of this addendum by signing and submitting this addendum acknowledgement form. Failure to acknowledge receipt of the addendum may be cause for rejection of the RFP submission.

When submitting all Proposals, this Addendum Acknowledgment Form must be included in the Proposal submittal. The page will not be considered part of the 20 single-spaced page limit for Submissions.

This Addendum No. 2 consists of two (2) pages and has the following information to be incorporated into the Proposal submittal. The following are responses to the questions the Lake Forest Library received from prospective bidders:

**Question #1.** Is the total proposal limited to 20 single-spaced pages?

Answer: The base bid document should not exceed 20 single-spaced pages. Additional information such as brochures, product specifications, etc. can be added as a supplementary document.

**Question #2.** How might bidders mitigate the impact on daily library operations?

Answer: Parties discussed different options for working hours such as between 6 am – 2.30 pm; 7 am – 3.30 pm and 8 am – 4.30 pm. Bidders are encouraged to review the schedule of upcoming library events and programs available at [Upcoming Events | Lake Forest Library](#)

Bidders should provide two proposals – one for a 5-day work week, and an alternate for working an additional day in the week to expedite the project.

**Question #3.** What is a good staging area to store equipment and supplies?

Answer: The expansion area in the Youth Services area (southeast part of the lower level).

**Question #4.** How can we make the existing elevator more ADA accessible?

Answer: Parties noted that the current elevator is ADA accessible. While we might potentially gain about 6 inches in width, it is likely that we would lose about 8 inches in length. Consensus was that it would be not cost effective to modify the current elevator's size. Bidders are not required to provide an alternate bid for this purpose.

**Question #5.** How should bidders quote for the interior finishes in the upgraded/modernized elevator?

Answer: Bidders should provide the interior finish package as an allowance cost which assumes mid-level materials. Please provide examples of materials that would/could be within that allowance.

The full RFP is at: Elevator Upgrade Modernization RFP June 19 2024.pdf  
([lakeforestlibrary.org](http://lakeforestlibrary.org))

I hereby acknowledge receipt of this Addendum 2 to the above-referenced Request for Proposals.


Firm Name: AMERICAN HOIST & MANLIFT, INC

Contact Person: JIM DUFFEL

Address: 15811 ANNCO DR.

City: Homewood State: IL Zip: 60491

Phone: (773) 350-2110 Email: JDOUFFEL@AMERICANHOIST.COM

Signature:  Date: 8/1/24





**15811 Annico Drive, Unit #5**  
**Homer Glen, IL 60491**  
**877/301-6510**  
*www.americanbeltmanlift.com*

August 12, 2024

LAKE FOREST LIBRARY  
360 East Deerpath  
Lake Forest, IL 60045

Re: Electrical Requirement Proposal

Per our survey, we are submitting the following proposal for the elevator modernization on the passenger elevator.

**PROPOSAL:**

TO PROVIDE ALL LABOR AND MATERIAL FOR THE ELECTRICAL REQUIREMENT ON THE EXISTING PASSENGER ELEVATOR AND INSTALL THE FOLLOWING:

**PROPOSAL:**

- Furnish and provide heavy duty fused disconnect.
- Furnish and provide heavy duty 110VAC disconnect.
- Furnish and provide GFCI outlet in elevator machine room.
- Furnish and provide machine room lighting.
- Furnish and provide pit lighting with GFCI outlet.

Our price for this work is **\$8,960.00.**

**American Hoist & Manlift, Inc.**



# Inner Security Systems, Inc.

Helping To Secure Your Tomorrow - TODAY

418 Treasure Drive  
Oswego, IL 60543-7936

Voice: 630.554.7878  
Fax: 630.554.8998

August 14, 2024

American Hoist & Manlift, Inc.  
15811 Annico Drive Unit 5  
Homer Glen, IL 60491

Attention: Mr. Joe Anderson  
Sent via: [joej@ahmelevator.com](mailto:joej@ahmelevator.com)

RE: Lake Forest Library / Elevator Modernization

This fire alarm proposal is based on a parts and smarts system per your plan.

#### Equipment List:

- 1 – MMF 300 - Monitor Module
- 1 – MR 101 – Relay
- 2 – H365RIV Heat Detectors
- 5 – CRF 300 – Form C Relays
- 6 – SD365-IV – Addressable Smoke Detectors

#### Includes:

- ) The above listed parts
- ) Programming
- ) Pretest and Final Test
- ) **Permit Budget - \$500.00**
- ) **Design Budget – \$3,080.00**

#### By Other:

- ) System Installation
- ) Permit, Plan Review, System Design, and Inspection Fees
- ) Surety Bonds and associated Performance Bonds

Please understand that additional devices at an additional cost-plus labor may be required after review or field inspection by the AHJ or local Electrical Inspector.

This is a proposal, not a contract. Installation and accompanying services listed above will be provided in accordance with the terms and conditions of the appropriate Inner Security Systems, Inc. Agreement.

#### Parts & Smarts:

\$9,445.00 - Includes Labor, Material and Tax

*Jerry Santo*

Jerry Santo  
Sales

Accepted \_\_\_\_\_ Date \_\_\_\_\_

Cc: American Hoist & Manlift, Inc. Lake Forest Elevator Modernization 08 14 2024

U.L.<sup>®</sup> Listed for Installation, Service, Inspection and Certification of. . .

Fire Alarm Systems S3238 ♦ Mercantile Burglar Alarm Systems BP8294 ♦ National Industrial Security Systems BP6460

IL Alarm Contractor Agency License # 127-000370



## FULL MAINTENANCE AGREEMENT

Date: August 12, 2024

Purchaser: Lake Forest Library

Location: 360 East Deerpath  
Lake Forest, IL 60045

By: American Hoist & Manlift, Inc.  
15811 Annico Drive Unit #5  
Homer Glen, IL 60491  
Tele: 708-301-6510 (call this number for service calls)  
Fax: 708-301-6522

### UNITS TO BE MAINTAINED:

<u>UNIT QUANTITY</u>	<u>MANUFACTURER</u>	<u>TYPE OF UNIT</u>
1	Alpha	Hydraulic

**1. SPECIFICATIONS AND LOCATION:** American Hoist & Manlift, Inc. ("Company") will furnish the following elevator service to the hydraulic elevator(s) in the building located at:

360 East Deerpath Road, Lake Forest, IL

The Company agrees to service the elevator equipment described above in accordance with the following terms and conditions. The Company agrees to provide trained elevator technicians to provide the services set forth in paragraph 2 below.

**2. RELIABLE MAINTENANCE:** For the duration of this Agreement, the Company will routinely examine, clean, lubricate and adjust the elevator equipment. As part of this Agreement, the Company will furnish the necessary cleaning materials and lubricants to perform this work. The examination, lubrication and adjustment cover the following equipment groups and related components of the elevator system: Controls and landing positioning systems, Signal fixtures, Car and hoistway door operating devices and door protection equipment, safety mechanisms related to elevator operation. We will lubricate for smooth and efficient operation, adjust the elevator equipment for performance and safe operation, relamp signals as required (during regularly scheduled visits). When conditions warrant, the Company will replace components worn due to normal wear and use. Controller parts, relays, timing devices, car & hatch door hangers, car & hatch door contacts, car & hatch door gibs, limit switches and belts. Refer to "exclusions" section for items not covered in this agreement.

X

(Check box if included)

**3. SAFETY TEST:** American Hoist shall test equipment as outlined in the American National Standard Safety Code for Elevators and Escalators, ANSI A17.1, current edition as of the date that agreement begins. We will perform annual pressure relief tests as required and submit results to the Customer and to the appropriate governing agency. Should any elevator not meet safety requirements, the cost of any necessary repairs shall be the responsibility of the Customer. The Company shall submit a proposal for Customer's approval, prior to proceeding. The Company will not be liable for damage to the equipment resulting from this test. You agree to pay for any costs associated with the inspector or inspection fees.

**4. EXCLUSIONS:** Replacing the following parts and/or taking the following actions pertaining to the elevator equipment or operation are expressly not included in this Agreement:

- A. Power disconnects, suspended ceilings, handrails, mirrors, cab floorings and floor covering, wood platform sub floorings, emergency lighting and power source, door astragal strips, sight guards, wiring for lights, hoistway doors, frames, sills, headers and supports, pit ladders, lights and screens, guide rails and their mountings, rail aligning, access doors, beams, sump pumps. Panels, gates and removable cab panels, fuses and feeders to controllers, light fixtures and operating stations, alarm bells, car & tank heaters, smoke detectors. Cleaning of cab interiors and exposed sills. Plungers, casings and cylinders, , Power units, valves pumps, loss of hydraulic oil, packing's, jacks, all hydraulic piping and connections except that portion which is exposed in the machine room and hoistway. Emergency power generators, telephones, intercom or music systems, and air conditioners or heaters. All buttons, button covers, halos, directional indicators, key or toggle switches, and fixture faceplates or finished surfaces of any kind, Braille marking, certificate frames, markings, power disconnect switches, main line fuses and power wires to the controller, smoke and heat detector devices, proprietary equipment, software and service tools, Any power source or components installed or connected for emergency standby power use.
- B. Tests, other than those specified previously, the installation of new devices on the equipment which may be recommended or directed by insurance companies, federal, state, municipal or other authorities, changes or modification in design, or replacements with parts of a different design.
- C. Correction of outstanding violations or test requirements cited by appropriate federal, state, or municipal authorities prior to the effective date of this Agreement.

**5. CONDITIONS OF SERVICE:**

- A. The Company is to be provided with full and free access to all equipment and is to be provided with a complete set of wiring diagrams. You agree to provide American Hoist with current wiring diagrams that reflect all changes, parts catalogs, and maintenance instructions for the equipment covered by this Agreement. You agree to authorize us to produce single copies of any programmable device(s) used in the equipment for the purpose of archival back-up of the software embodied therein. These items will remain the property of you the owner.

B. The Customer agrees that they will not permit others to make alterations, additions, adjustments, repairs or replacements to the elevator equipment during the term of this agreement. You agree to accept our judgment as to the means and methods to be employed for any corrective work under this agreement. In the event of sale, lease or other transfer of the elevator(s) or equipment described herein, or the premises in which they are located, you agree to see that such successor is made aware of this agreement and assumes and agrees to be bound by the terms hereof for the balance of this agreement, and subject to termination as herein provided, or otherwise be liable for the full unpaid balance due for the full unexpired term of the agreement.

C. The Customer shall give the Company written notice within 24 hours of any accident, alteration or change affecting the equipment, any changes in ownership, and shall immediately discontinue any elevator from service when the equipment becomes unsafe or operates in a manner which might cause injury to a user thereof and shall maintain surveillance of the equipment for such purposes.

D. If others make alterations, additions, adjustments, repairs or replacements, Company may at its sole option terminate this Agreement upon ten (10) days written notice. The Company may, at its sole option, deem such a termination to be a premature cancellation. Company may, in the alternative, increase pricing to cover its increased costs. Company hereby disclaims responsibility for accidents, injuries or malfunctions related to equipment so altered, adjusted, repaired, or replaced.

E. Company has based its price on the assumption that, in performing the work required by this Agreement, Company will not encounter conditions having an unusual or adverse effect on the equipment or the circumstances under which Company must perform its work. Company shall not be responsible for any adverse effects resulting from these conditions. Such conditions include, but are not limited to, water in the pit area, water leaking onto the equipment, excessive temperature or humidity in the machine room, excessive departures from rated voltages or frequencies, or an imbalance in the power supply. If Company encounters any of the above conditions; Company may at its option suspend the performance of its work under this Agreement pending negotiation of additional charges as compensation for increases in its costs.

F. Company has the responsibility to make only those replacements, adjustments and repairs required under this Agreement, which are necessary due to ordinary wear and tear. Company is not obligated to make adjustments, repairs or replacements necessitated by any other cause, including, but not limited to, accidents, vandalism, misuse, or obsolescence of the equipment. In the event adjustments, repairs or replacements become necessary due to such causes and Customer fails to authorize and pay for additional work, Company shall have the right to terminate this Agreement upon ten (10) days written notice. In the event Company elects to terminate, Company will consider this a premature cancellation.

**6. HOURS OF SERVICE AND CALL BACKS:** The routinely scheduled work will be performed during regular working hours, 7:00 am to 3:30 p.m., on Monday through Friday, except for federal and state holidays and all Local 2 Union holidays. Callbacks are defined as minor adjustments or emergency entrapments. Callbacks outside of the normal business hours and any overtime work, standby or testing that you request will be billed based on the option selected below:

**7. EMERGENCY CALL-BACKS:**

☒

Call-backs during the regular working hours of regular work days are covered in this contract. After hour call-backs shall be billed at our standard overtime billing rates. (Check box if included)

☐

All call-backs, including outside of regular hours are covered in this contract, but limited to One (1) mechanic overtime hours. Repairs that exceed One (1) overtime hours shall be billed at our standard overtime rate. You will be charged for the OVER TIME PREMIUM portion only including the travel time. (Check box if included)

☐

On all callbacks, we will absorb the premium expenses. (Check box if included)

**8. LIABILITY TERMS:** The parties hereto expressly understand and agree, to the furthest extent punishable by law, as follows:

A. Nothing in this Agreement shall be construed to impose any liability upon the Company for accidents, injury or damage to persons or property except those directly attributable to the sole negligence of the Company or its employees. The Company does not assume possession or control of any part of the elevator equipment. The Customer is solely responsible for accidents, injury or damage to persons or properties while riding in or about the elevators and equipment. It is further understood that when not working in, on or about said equipment, the Company shall not be responsible for leveling of cars at landings, eccentricities in operation of the car and hatchway doors or their locking devices or for any situation that may occur which cannot be revealed by the ordinary examinations offered with this service. The Company will not be held responsible or liable for any loss, damage, detention or delay resulting from causes beyond its reasonable control, including, but not limited to: power failure or voltage fluctuations of the primary power source, strikes, lockouts or other concerted action of workmen, accidents, fire, flood, theft, vandalism, acts of God, acts or omissions of any governmental authority, war, insurrection or riot, embargo, wreck or delay in transportation, or inability to obtain from usual sources necessary labor, materials or manufacturing facilities. In the event of delay due to any such cause, the performance of the Company's services will be postponed without liability to the Company by such length of time as may be reasonably necessary to compensate for the delay. In no event shall the Company be responsible for special, indirect, incidental or consequential damages.

B. Company will not be liable for damages of any kind regardless of the form of action in any amount in excess of the annual price of the Agreement. Company will not be liable in any event for special, indirect, incidental or consequential damages.

**9. CUSTOMER REPRESENTATIONS:**

A. Customer will follow and adhere to any OSHA, federal and/or state regulations concerning the safe use and operation of all equipment sold to or repaired by Company.

B. Customer will not modify or remove any parts and/or safety equipment located on said equipment prior to, during or after use.

C. Customer will not assert any claim or action against Company nor will it participate in or assist any person or entity in the prosecution of any claim against Company on account of injury to or death of persons employed by the Customer or Customer's subcontractors, agents or employees; injury to or death of any other person; or injury to, damage or destruction of property, real or personal, including loss of use thereof.

D. Customer has fully reviewed this Agreement on its own behalf and agrees that it shall be binding upon all of its agents, representatives, attorneys, successors and assigns.

E. If one of Customer's employees, agents, subcontractors or representatives is injured and files a claim with the Industrial Commission of Illinois or files any worker's compensation claim, Customer will waive any lien it is entitled to for payments made in satisfying said worker's compensation claim in any action subsequently filed against or in any way naming Company as a Defendant, Counter-Defendant or Cross-Defendant. The waiver of Customer's lien would apply in any case involving Company and/or Customer on account of injury to or death of persons employed by the Customer or Customer's subcontractors, agents or employees; injury to or death of any other person; or injury to, damage or destruction of property, real or personal, including loss of use thereof.

**10. INDEMNIFICATION:** Customer shall, and hereby agrees to, indemnify and hold harmless Company, its officers, employees, agents or assigns from and against any and all, and all manner of, claims, loss, damage, liability, causes of action or suits, damages, judgments, awards, costs, attorneys' fees, or any and all other expenses or liabilities of any kind or nature, on account of injury to or death of persons employed by the Customer or Customer's subcontractors, agents or employees; injury to or death of any other person; or injury to, damage or destruction of property, real or personal, including loss of use thereof. Upon Company's demand, Customer shall, at its cost, defend with counsel of Company's choice, any suits or actions against Company covered by the terms of this Agreement.

**11. WAIVER:** No right of Company under this Agreement may be waived, except in writing signed by a duly authorized officer of the Company. This instrument expresses the entire agreement between the parties, and all prior agreements, both written and oral, between the parties relating to the subject matter herein are deemed merged herein. If any provision of this Agreement shall for any reason be held invalid, such provision shall not affect the validity of the remaining provisions of this Agreement.

**12. CONTRACT PRICE:** The price for the service stated in this agreement shall be **\$170.00 per month**, including taxes, payable monthly in advance immediately upon receipt of invoice.

**13. TERM:** This agreement is effective for **One (1)** year starting **Upon acceptance** and is non-cancelable, except for thirty (30) days written notice for reasons of non-performance. "Non-performance" is defined as our inability to remedy any deficiencies within thirty (30) days after receiving the notification from you. To facilitate continuous service, the agreement will automatically renew/continue for successive **One (1)** year periods unless either party serves a timely written notice upon the other party of its intention to cancel at least ninety (90) days before the end of the initial **One (1)** year period.

**15. PAYMENT:** In the event Customer fails to comply with any terms of this Agreement, dies, becomes insolvent, files for protection under the U.S. Bankruptcy Code, or if any other act or event occurs by reason of which Company reasonably deems itself insecure, Customer shall be deemed to be in default of this Agreement. Upon default and without demand or notice: (a) all amounts owing by Customer under this Agreement shall become immediately due and payable; (b) all of Company's obligations under this Agreement shall terminate; and (c) Customer is obligated to pay interest at the rate of 1.8% per month on all overdue amounts and shall further pay, upon demand, all of Company's costs and expenses resulting from such default, including reasonable attorney's fees, whether or not litigation ensues.

**16. ANNUAL PRICE ADJUSTMENTS:** The price shall be adjusted annually and such adjusted price shall become effective as of each anniversary date of the agreement based on the percentage of change in the average rate paid to elevator examiners hourly rate as per the International Union of Elevator Constructors.

This rate consists of the hourly rate paid to examiners plus fringe benefits and union welfare granted in place of or in addition to the hourly rate. Fringe benefits include pensions, vacations, paid holidays, group insurance, sickness and accident insurance, and hospital insurance. The contract price may also be adjusted in the event that the equipment is modified from its present state. . We also reserve the right to make additional adjustments to the price of our service under this Agreement and/or enact surcharges as needed to account for increased fuel prices when such increases exceed the Consumer Price Index (CPI) current rate. We also reserve the right to make additional adjustments to the price of our service under this Agreement in the event that the equipment covered by this agreement is modified from its present state.

**17. ACCEPTANCE:** This proposal shall become valid only when accepted by the Customer, and when subsequently approved by an officer of the Company. If any agent on behalf of the Customer signs this contract, the party so signing represents and warrants to the Company that it is duly authorized to so act on behalf of the Customer and shall be liable for damages which the Company may suffer if such representations and warranty are untrue. In the event acceptance is in the form of a purchase order or other document, the provisions, terms and conditions of this contract shall govern in the event of a conflict.

This Agreement will constitute the entire Agreement for the services described and all prior representations or agreements whether written or verbal not incorporated herein are superseded.

**15811 Annico Drive Unit #5  
Homer Glen, IL 60491**

Print Name: \_\_\_\_\_

Print Name: \_\_\_\_\_

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

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

Title: \_\_\_\_\_

Title: \_\_\_\_\_

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

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





JV DESIGN

CUSTOM ELEVATORS

5958 S. Central Ave. Chicago, IL. 60638 | (708) 853-7500

[WWW.JVDESIGNMFG.COM](http://WWW.JVDESIGNMFG.COM)



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## LAKE FOREST LIBRARY - SAMPLE SCHEDULE

[illegible]

## LABOR

[illegible]



**15811 Annico Drive, Unit #5**  
**Homer Glen, IL 60491**  
**877/301-6510**  
*www.americanbeltmanlift.com*

American Hoist & Manlift Inc. (AHM) was founded in June of 1999 and was set up to be a conveyance contractor selling, servicing and installing material handling equipment such as conveyors, industrial cranes, dock loading equipment and belt manlifts. Over the years American Hoist & Manlift Inc. has grown from a home start up business into a company providing nationwide service here in the United States as well as completing projects in Canada and Central America.

In 2010 American Hoist added an Elevator Division and became signatory with the Elevator Constructors Union Local #2. AHM is actively involved with the ASME Safety Standards Committee having our Safety director currently serving as Chairman of the A90 Committee and a member of the ASME Safety Codes and Standards' board of directors.

AHM maintains elevator equipment at local banks, schools and churches as well as condo units, apartments, municipalities and small businesses. Some of the company's American Hoist is doing business within the Chicago land area is as follows:

Village of Buffalo Grove – 4 elevators  
City of Lake Forest – 9 elevators  
Rockford Public Schools – 36 elevators  
Rockford Public Housing – 8 elevators  
Urban Equities, LLC – 17 elevators  
Cinespace – 9 elevators  
Freidman Property Management - 5 elevators  
City of Joliet - 16 elevators  
Housing Authority of Joliet – 7 elevators  
Inter Continental Real Estate – 1- elevators  
Preserves of Marley Creek – 8

Nationally American Hoist & Manlift Inc. works at many of the country's top 500 companies. Some of our customers include the following In the Agricultural segment.

ADM  
Bunge  
ConAgra  
Illinois Corn  
Soular  
The Andersons  
Georgia Pacific





**15811 Annico Drive, Unit #5**  
**Homer Glen, IL 60491**  
**877/301-6510**  
*www.americanbeltmanlift.com*

American Hoist & Manlift, Inc office team members are:

Joe Anderson - President

B.A. Finance DePaul University Chicago, IL

Worked through college at the Industrial Erectors Inc. as Millwright journeyman, Foreman and certified Welder.

Journeyman Millwright Local 1693

Member ASME A90

Kate Walsh - Accountant

B.A. Accounting North Central College MBA Tax Accounting

Worked for Crowe Chisek prior to joining AHM Teaches accounting at North Central College

Kay Burnard – Office Manager & Dispatching of Service Calls

Jim Druffel – Maintenance Supervisor and Mechanic

Member of International Union of Elevator Constructors since 1980



**15811 Annico Drive, Unit #5**

**Homer Glen, IL 60491**

**877/301-6510**

*www.americanbeltmanlift.com*

August 1, 2024

#### AMERICAN HOIST & MANLIFT, INC COMPANY INFORMATION

American Hoist & Manlift Inc. (AHM) was founded in June of 1999 and became signatory with the Elevator Constructors Union Local #2.

AHM has modernized elevators in condo units, apartments, office buildings factories and small businesses. Some of the company's American Hoist has modernized elevators is as follows:

- Cinespace Studios, Chicago – 2500# Passenger Duplex – 5 stops; Tony Laurisch – 219/682-8114
- Cinespace 31<sup>st</sup> Street, Chicago – 4000# Passenger Elevator – 2 stops; Tony Laurisch 219/682-8114
- Libertyville Civic Center, Libertyville – 2500# Passenger Elevator - 2 stops; Dan Juarez 847/613-5181
- 301 Galena, Aurora – 2500# Passenger Elevator – 3 stops; Mark Stefanic 815/222-8859
- St Mark Manor, Chicago – 2500# Duplex – 6 stops; Matt Washington 312/296-9493
- Talcott Building, Rockford 2500# Duplex – 12/13 stops; Justin Fern 815/904-6696
- 119 Church, Rockford 2500# Passenger Elevator – 5 stop; Justin Fern 815/904-6696

Sincerely,  
AMERICAN HOIST & MANLIFT, INC

Jim Druffel

**LAKE FOREST LIBRARY**  
**ELEVATOR MODERNIZATION PRE-BID MANDATORY MEETING**  
**JULY 8, 2024**

Company	Representative	Phone	Email
Schindler	Dave Alexander	917-217-6254	david.alexander@schindler.com
"	Mark Bertola	630-280-5768	mark.bertola@schindler.com
VCS	Dan Marschke	708-990-0535	Dan@VCSelective.com
American Hoist	Jay Cooper	815-603-6613	JCooper@AHM elevator.com
Schindler	Mary Vitt	630-303-0523	mary.vitt@schindler.com
RZ CONSTRUCTION	Dimitrios Bizios	630-258-7727	Dimitrios@RZservices

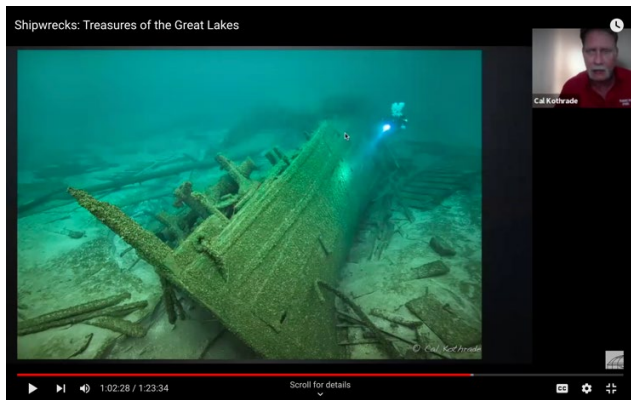
<b>ELEVATOR UPGRADE/MODERNIZATION REQUEST FOR PROPOSAL</b>	<b>Schindler Elevator</b>	<b>American Hoist and Manlift</b>
<b>Quality of Bid Response</b>	Asked to submit additional information after they submitted their base bid. Original bid and additional information were presented after the stated deadline.	Asked to submit additional information after they submitted their base bid. Original bid and additional information was presented by the stated deadline.
<b>Base Bid for 5 day week</b>	\$164,433.00	\$156,900
<b>Allowance for Cab Interiors</b>	\$20,000 in addition to base bid	\$15,000 (included in base bid)
<b>Additional Work Required</b>	Would subcontract tasks that would be performed by other contractors for a total cost of \$86,432.	Additional electrical work quoted at \$8,960. Will also need to add smoke detectors and heat sensors for an additional cost of \$9,445. No other additional work or cost is anticipated.
<b>Total cost</b>	\$270,865	\$175,305
<b>Warranty</b>	Covers parts only that were installed under the auspices of the modernization.	Full warranty on all parts and labor included at no additional cost for one year.
<b>Annual Maintenance Contract</b>	Would prefer a longer term maintenane contract for 5 years. Library can opt for a year of Warranty Maintenance/New Product Service prior to the award of a longer term maintenance agreement for a cost of \$245 per month. Annual maintenance contracts have to be paid in full in advance for the year, currently at \$2940.	First year maintenance is included in bid. Annual maintenance contract, currently at \$170 per month, beginning with year 2. Annual cost is \$2040.

<b>ELEVATOR UPGRADE/MODERNIZATION REQUEST FOR PROPOSAL</b>	<b>Schindler Elevator</b>	<b>American Hoist and Manlift</b>
<b>Cylinder Reuse</b>	Assumed reuse of existing cylinder that is expected to last another 15-20 years.	Assumed reuse of existing cylinder that is expected to last another 15-20 years. Will change packing around cylinder head. New Hydraulic pumping unit.
<b>Time elevator will be offline</b>	5 weeks	Totally without service for 1 week. Their technician will ensure limited elevator service as needed for special circumstances that are scheduled in advance.
<b>As built drawings, wiring diagrams, etc.</b>	Will provide	Will provide.
<b>Estimated life span of modernized elevator</b>	15-20 years	15-20 years
<b>Other Considerations</b>	Large corporation with global presence.	Small organization with local presence. Services elevators for City of Lake Forest. Has done a commendable job of maintaining the existing elevator.
		Will provide mechanism to lower elevator using a battery without back up generator.
August 16, 2024		

## Library Operations Report July 2024

### Adult Services

In July, we welcomed two new librarians to Adult Services. Vanessa Powell will be working full-time, planning genealogy programs and working on getting our archives and historical collection in order. Breen Tivnan is working for us part-time. Breen grew up in Lake Forest and is currently finishing her master's degree in library and information science. In addition to working at the Adult Services desk, she has also been cross-training in the Children's Library.



The Adult Services staff has been busy offering readers advisory to travelers, giving assistance in downloading audiobook and eBooks, has kept the foyer stocked with family activities, and hosted both in-person and virtual programming in July. “Shipwrecks: Treasures of the Great Lakes” was held on Zoom with 25 patrons watching from home. The recording was posted on our library's YouTube channel and within two weeks we had 850 views. We hosted the staff from Lake Forest College for a tour of our library and hosted Representative Bob Morgan's staff for a drop-in information session in our Foyer. An adult calligraphy class was enthusiastically received. Lydia and Chad co-hosted an informational session on using eBooks and audiobooks and explained the different Apps that the library offers.

Another Summer Reading program wrapped up. Final statistics for the 2024 adult summer reading program:

- 162 people registered/participated
- 95 people completed the program (meaning they read at least 4 books – and got a book prize to keep)
- 658 books were logged by readers
- 473 raffle tickets were submitted
- The most popular weekly raffle drawing was for Lake Forest Book Store (208 tickets) with Fresh Market (86 tickets) and Sunset Foods (77 tickets) also very popular.

For comparison, last year at the end of the program, we had 165 registered, and 74 completed. So, good job readers for reading more this year!



## Media Lab



In July, the Media Lab staff held 30 one-on-one Tech Help appointments teaching Lake Forest residents basic skills including: getting started with email, navigating websites and commonly used apps, operating search engines, mastering cybersecurity, and more. In addition, group classes were led by Media Lab staff on topics including Mac and iPhone fundamentals, navigating Google Drive and cloud storage, 3D printing, sublimation printing and heat transfer, and accessing eBooks and eAudiobooks on mobile devices.



The Takeout Tech collection was refreshed with a new display and updated items and moved into the Reference Room. Additions to the collection include international travel adaptors, a virtual reality headset, Roku streaming devices loaded with new streaming services (Disney +, MAX, Hulu, and Acorn TV), and more. The Takeout Tech collection is an initiative that lends objects instead of books, with the goal of reducing consumption and environmental impact. The collection also provides Lake Forest residents with a way to try out items before deciding if they want to own them.

## Children's Services

The Children's staff hosted **Summer Storytimes** at the Library and offsite at Elawa Farm, Montessori School of Lake Forest, and Deerhaven Childcare and Learning Center for a total of **535** children and caregivers in attendance.



**Art and Magic with Ben's Bubble Show:** A very interactive show of bubble magic, illusions, and sculptures.



**Under the Stars with Firefly Family Theatre:** 68 children ages 1-5 and their adults attended this interactive puppet show.





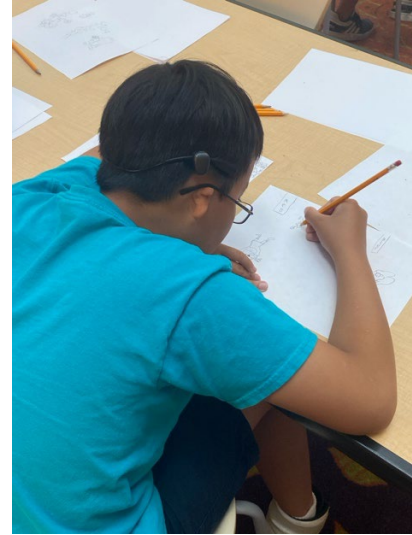
**Morris the Magic Man** is a professional who has performed magic all over the world. His show involved the audience and was filled with fun, puppets, and of course great **MAGIC** that the kids loved!

Students in Kindergarten through 4<sup>th</sup> grade showed off their dragon creations at the latest **LEGO Club**.



The ages 0–5 crowd had fun getting messy with **Fizzy Cloud Dough & more** at the monthly Little & Messy sensory play. The ages 5–12 crowd made a big mess creating their own **silly putty**.





**Andertoons Cartooning Class for K through 8<sup>th</sup> grade:** Professional cartoonist Mark Anderson taught us how to draw weird and wacky sports including the 400-meter Handstand, Greco-Roman Staring, and Hamster Dressage! Just in time for the Summer Olympics.



**Jim Cruise the Spoon Man** makes music with two ordinary household tablespoons, featuring special guests Trustee Bob Shaw on the spoons and a teen volunteer playing the washboard during the Mountain Band portion of this lively show.



## Arty Party Summer Reading Celebration!

From 1:00 –3:00 pm on Saturday, July 27 we had 363 children and adults attend the Lake Forest Library summer fun bash on the Library front lawn. What a magnificent day for all our extraordinary events including the Dan Gogh's Magic & Art Show, Kona Ice also came with its novelty food truck, we hosted two face painting stations and a henna station, and a grand finale of Chicago's oldest Foam Company provided great entertainment for all our patrons.







On such a breezy afternoon some of the foam was floating away!







Staff member Carla Weir with her grandchildren attended, and even the trustees came to the fantastically fun Art Party on the Lake Forest Library front lawn!



**Justin Robert's Concert** in the Friends Reading Room!

### **Art Is All Around Us! Summer Reading**

Juniors (0-5 years old) 192 registrants, and 110 finishers

Youth (6-11 years old) 238 registrants, and 115 finishers



## Young Adult Services

The Teen Summer Reading Program had 100 participants and 52 finishers!

Emmy led many successful programs this month with the help of our dedicated teen volunteers!



Chess Club and our cultural Taste Test programs continue to be a success, with July featuring candy, soda, and baked goods from Mexico.



The Glow-in-the-Dark Scavenger Hunt returned for another successful year, with teens hunting through the dark Library after hours to find all their glow sticks and win AMC gift cards.





Emmy partnered with Ming in the Media Lab to run a metal stamping workshop where teens could make keychains or jewelry—earplugs were provided! This partnership with the Media Lab is a great way to get teens comfortable in parts of the Library they aren't familiar with.

Our teen volunteers were invaluable in decorating and setting up our Harry Potter Birthday Party! They sorted children into houses, taught them how to make chocolate frogs and wands, showed them how to play games, and assisted with trivia! 65 participants enjoyed our scavenger hunt, trivia, and DIY magical activities. The program received many compliments from kids and parents, and many of them were about how wonderful our teen volunteers made the event.



## Facilities

On July 08, 2024, the Building Committee hosted a mandatory pre-bid meeting and site walk for the elevator modernization project. Two vendors (Shindler and American Hoist and Man lift) contractors attended the event and are expected to submit proposals to upgrade the elevator. Bids/Proposals were due Friday August 02, 2024.

Anchor Mechanical began installing the new boiler return/condensate pumps on July 08, and the work was completed August 02. Start-up and testing will start once we are in the heating season.



Inner Security Systems was onsite July 15 and 16 to inspect and repair the fire alarm panel after numerous false alarms throughout the 4<sup>th</sup> of July weekend. It was determined that the panel was beyond repair and a new replacement panel was ordered. The new panel was installed on August 01, 2024, and the system was returned to service without issues for \$3,976.00.





The Building Committee met with WJE Associates to discuss the restoration of both East and West courtyard walls as well as the masonry benches at the Deerpath Road sidewalk. Ken Itle of WJE explained the first phase of the project was to conduct exploratory digging to identify the foundation and footing of the walls. This fact-finding work is to start in August and will determine the next steps for the project. Additionally, the Building Committee asked WJE to further investigate the basement seepage while conducting the digging at the

Southwest corner of the main entrance (intersection of the Children's restrooms and the West courtyard wall.)

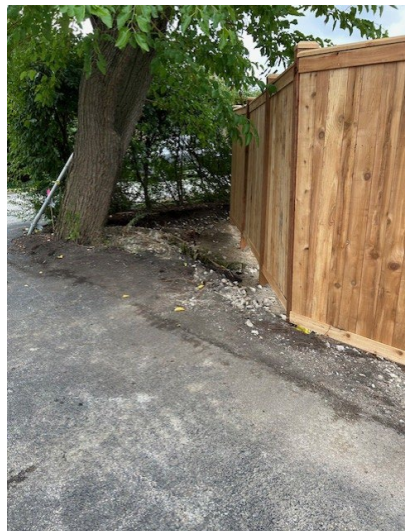


As part of the preventive maintenance contract, Hill Mechanical was onsite July 22, 2024, to inspect and change the HVAC filters.

On Saturday July 27, 2024, the Library discovered the fence along the north property line had been removed earlier in the morning by the neighboring developer (Altounian Construction). Members of the Building Committee, the Director of the City's Community Development, members of the Library Board and the owner of the neighboring property developer met at various times throughout the day to discuss the issue. A meeting was subsequently held on Monday July 29 with all parties attending to address the impact on the Library. A new fence was installed during the following week and completed on August 03, 2024. The developer moved the fence line 18 inches north into the condominium property and the proposed 45-degree cut in the fence 3 feet northwest to improve the line of sight for vehicular traffic in the library driveway. The mulberry tree will also be coming down soon. The builder will also install railroad



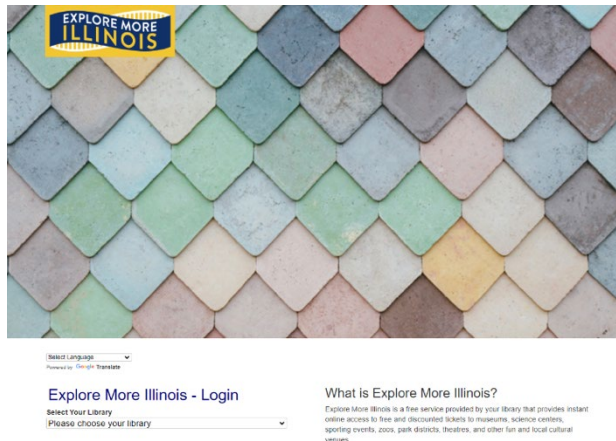
ties and backfill the area to address the difference in elevation between the two properties. All this means that the fence will now be further away from the library's property line and will now be on the condominium's property. The terms of the original development agreement also called for a public pedestrian walkway between our properties. The builder will install a solid panel to prevent pedestrians from entering the library property until the library does its due diligence on pedestrian safety, traffic flow and parking.



## Circulation/Interlibrary Loan

Circulation and ILL are pleased to report that most of our numbers are up from last year.

Travelers needed all sorts of must-read books, mobile hot spots, travel guides, and Launchpads to keep the mind engaged on the road or in the backyard. Our hold shelves were bursting at the seams!



The Museum Adventure Passes have been popular this July with 13 passes requested. Brookfield Zoo and the Botanic Gardens topped the list with 5 each. Other museums visited – The Illinois Holocaust Museum and Bess Bower Dunn Museum. Staff took the opportunity to direct our patrons to the Explore More Illinois site on our website. It is available right below the Museum Adventure passes. Patrons can access the site for tickets to many more museums in Illinois.

## Training and Conference Participation:

Report from the American Library Association Conference  
June 28-July 1, 2024

Kate Buckardt attended the American Library Association Conference in San Diego. In addition to attending many workshops, author talks, and other conference sessions, she tried out a model of our new vending machine which we will install this fall.

## Trevor Noah Brings Main Character Energy

Former *Daily Show* host and comedian Trevor Noah, who has emceed the Grammy Awards for the past four years and creates the Spotify podcast *What Now? with Trevor Noah*, warmed up the crowd as ALA's opening keynote speaker. ALA past president Lessa Kanani'opua Pelayo-Losada, assistant director of library, arts, and culture for Glendale, Calif., introduced and led a conversation with Noah, whose picture book *Into the Uncut Grass*, illustrated by Sabina Hahn, is forthcoming from One World in October. Noah became a library favorite with his general audience memoir *Born a Crime: Stories of a South African Childhood* and an adaptation for young readers, *It's Trevor Noah: Born a Crime*.

“The book is powerful, but the library is the energy behind that power,” Noah said. He recalled his childhood library as a “quiet, well-kept, organized” haven within walking distance of his home, and spoke about the continuing importance of libraries to communities facing tight finances and to children seeking information on “the world they’re inevitably going to come up against.” An anti-censorship crusader, whose book *Born a Crime* has faced banning efforts, Noah championed the analog book format, telling a receptive audience that “there’s no clickbait in a book” and “there’s no algorithm in the library.”

Noah reflected on his work as an all-ages author, joking that “I borrowed heavily from me” when creating the inquisitive lead character of *Into the Uncut Grass*—a boy who asks questions and pushes back on authority. Noah said that both his memoir and picture book required “trying to find the throughline” between his memories and how others remembered living through the same experiences, and that it reminded him that everyone feels like a main character with their own unique perspective. “I always thought my mom was the side character in my life,” he joked. “And then I was like, wait a minute, I’m the side character.”

Composing a picture book, Noah said, kindled his imagination - “It’s like a plant that doesn’t need much watering” - and made him more respectful in his interactions with children. Kids “Have a list of to-dos that are just as important as yours,” he told the crowd, and adults themselves are not that far removed from their younger selves. “The tantrum you throw in the office is the same one you threw when you were five years old.”

Pelayo-Losada described Noah’s books as a platform for creativity and the freedom to read, and Noah agreed that his storytelling is an effort to stimulate reading comprehension and critical thinking at all ages. “I’m writing it for me now, remembering me then,” he said of his picture book. “I’m trying to write a book that applies to both the acorn and the oak tree it’ll grow into.”

Conference highlights included sessions on:

### **Breaking Boundaries: Harnessing the Power of Artificial Intelligence and ChatGPT to Transform Library Services**

The presenters likened Artificial Intelligence to Auto Complete on steroids. Librarians can be a great resource for students and for patrons, we can be teachers and informers. It is important to teach to understand, to limit the fear of technology and the unknown. We should be mindful of hype and fear, that there are extreme perspectives and those get media attention.

It is important to remember that the way you search, the language (technical language vs conversational) will produce vastly different results. It is important to play around with these tools and have a goal in mind instead of just a general search.

Helpful things AI (Artificial Intelligence) can do to make your job easier: ask it to summarize emails and reports. You may see this on Facebook and other threads, hotel reviews summarized. Historical newspapers for instance: ask it to search subjects and not just keywords.

AI will be another area of digital divide, dividing who can afford it as prices will go up. The higher the costs the more precise the results. Be aware of the sources searched for, which are scraped for data and what data is being collected. Watch all the webinars you can and become aware of the trends. Below is the handout and the slides from this workshop.

<file:///C:/Users/kbuckardt/Downloads/H-2619758-231642-1-001.pdf>

<https://www.eventscribe.com/2015/APP/PresentationSlides/slideShareV3.asp?sfp=MTkwNDN8MjYxOTc1OHw2MjM1NTEzMHwtMQ==&SlidesID=402852>

### **The Future of Digital Literacy in Public Libraries**

<https://www.eventscribe.com/2015/APP/PresentationSlides/slideShareV3.asp?sfp=MTkwNDN8MjYxOTc1NHw2MjM1NTEzMHwtMQ==&SlidesID=403283>

Digital literacy is a forever changing landscape, with the pandemic introducing virtual/online learning, with generative AI hitting the scene and the rate at which organizations are changing to digital engagement only, it is imperative that public libraries stay on top of how to prepare our patrons for the future of digital literacy.

Libraries have a unique place as educators and trainers. We can provide many kinds of literacy including digital literacy. We can prepare our patrons for what is coming in Artificial Intelligence. We can help keep the divide from growing wider by talking about it (the elephant in the room).

We use AI every day and do not realize it. It is a convenient tool that we can quickly become dependent on (think maps) and we need to be aware of privacy concerns (geo-locators).

Traditional AI excels at analyzing data and performing specific tasks based on predetermined algorithms that are preprogrammed. Examples are playing chess, driving vehicles.

Generative AI creates new content, taking large quantities of existing data, analyzing it, and then based on those findings produces new content. It relies on machine learning to recognize, predict, and create content using the data sets. It can create text (books), images, music, and Google Maps in real time with predictions.

AI is good for efficiency and creativity, can be helpful in reading and understanding documents such as legal and medical - with caveats.

Sources to look at:

**CoPilot:** powerful tools with spreadsheets which may improve productivity but can be costly and there are privacy concerns. <https://copilot.microsoft.com/>

**Zoom** has meeting and note taking AI.

<https://www.zoom.com/en/ai-assistant/?keyword=ai%20for%20zoom%20meeting%20notes&matchtype=e&network=g&devic>



[e=c&zcid=13679&utm\\_source=google&utm\\_medium=cpc\\_smb&utm\\_campaign=SEMB|G|AME|R|USA|ZAIC|EN|BT&gad\\_source=1&gclid=EA1aIQobChMIINHEm7ushwMVDTUIBR25Sww4EAA YASAAEgLtaPD\\_BwE](https://www.google.com/search?q=joyce+vision+aid&rlz=C313679C1N1NTEzMHwtMQ==&slideshow=403283&source=google&utm_medium=cpc_smb&utm_campaign=SEMB|G|AME|R|USA|ZAIC|EN|BT&gad_source=1&gclid=EA1aIQobChMIINHEm7ushwMVDTUIBR25Sww4EAA YASAAEgLtaPD_BwE)

**Joyce** has smart vision aid. <https://www.immervision.com/joyce/>

**ChatGPT** is multilingual and automates tedious tasks. The free version content is only updated through October 2023. <https://chatgpt.com/>

**Perplexity AI:** Good for kids and beginners. No account needed, cites the sources, easy to use, answers questions. <https://www.perplexity.ai/>

### **Open AI Sora**

Sora is the future, looks crisp and very real. Sora marks a significant milestone as the first humanoid robot crafted by Saudi hands. Born from the innovative spirit of Saudi Arabia's robotics community, Sora embodies a blend of cutting-edge technology and cultural significance.

<https://openai.com/index/sora/>

Teaching about Artificial Intelligence: Start with teaching about the tools, the risks, and errors. Move on to copyright, the future of AI.

We should be looking at the Library of Congress for copyright policy for AI. Make sure to have books on this topic.

Girls.Jam.ai <https://girlswhocode.com/news/girls-who-code-launches-girljams-an-ai-songwriting-experience>

AI is the future of learning and teaching, digital literacy, and cybersecurity. We can keep patrons safe through education, teach them to be aware of what cookies and digital tracking do, how to erase browser history. Teach to be technically mindful, not fearful.

SIFT: **S**top, **I**investigate the source, **F**ind better coverage and **T**race the quotes and the claims.

Digitalearn.org is a great tool to share <https://www.digitalearn.org/>

<https://www.eventscribe.com/2015/APP/PresentationSlides/slideShareV3.asp?sfp=MTkwNDN8MjYxOTc1NHw2MjM1NTEzMHwtMQ==&SlidesID=403283>

### **Outreach: Service Beyond our Walls**

Extend services via community partnerships: schools, daycare, senior housing. Partner with other non-profits. Be mindful of cultural barriers and assumptions. Residents may be fearful of registering for library cards, related to stereotypes, citizenship, so offer drop in, non-register programs where they are: community centers, malls, markets.

There may be a fear of asking for help, a lack of transportation, accessibility, lack of understanding of what libraries do. If we go to them, they may be less fearful, it makes it easier to approach us. Technology and literacy can ease the barriers and make the library more accessible, less forbidding.

### **Navigating Every day, Unintended Microaggressions**

Billie Lee, author of *Why are you So Sensitive? Navigating Every day, Unintended Microaggressions*. Even when they come from people with good intentions microaggressions can be painful and harmful to the workplace. Her co-author, Psychologist Dr. Gina Torino, provides real dialog and answers to painful comments. She helps readers to understand the underlying dynamics and simple ways to reduce harm in your own interactions.

### **Beyond the: Embracing the Freedom to Read through Curation and Promotion on Inclusive Collection Audit**

The materials selection team from Oak Park has 4 librarians who order for the 3 branches, 130 employees in total. Their selection audit took 6 years.

They spoke a little about HB2789, that libraries be designated as a book sanctuary and that libraries be free, and the public protected against attempts to ban, remove, or otherwise restrict access to books or other materials. Provides that the State Librarian shall prescribe rules concerning the development of access to materials.

(<https://www.ilga.gov/legislation/BillStatus.asp?DocNum=2789&GAID=17&DocTypeID=HB&SessionID=112&GA=103>)

HB2789, designated as a book sanctuary

In speaking in defense of challenged books, access and opportunity are good buzz words for libraries to use.

In 2018, Oak Park Library started a diversity audit, wanted it as an ongoing process offering diverse stories for everyone to see themselves in the collection/materials. The goal was to link to the strategic plan and the mission statement to empower every voice in the community, a library for everyone. They needed to update policies, they had to write diversity statements.

Patrons may hesitate to ask for assistance and may feel that to expose their interest in some materials may be unsafe, so develop collections for those who may not want to ask for help. Their philosophy of curation is to be anti-racist, to use language that works for everyone including historically marginalized communities, keeping in mind that good and diverse collection development is community engagement.

Maximizing accessibility, sharing other cultures and experiences. Our job is to have a plan and a team including staff. Go beyond heritage months, and remember digital displays are important too. Be intentional, 30% of materials in displays should reflect diversity. If cookbooks are

popular, use them in a way to offer diversity. Have information for staff to understand the importance of representing the whole community with the collection.

Dewey placement: genres: use thrillers, not action.

How to start an audit? What to do with audit? You can use data as a tool, a framework.

Be mindful at the point of selection: pick diverse collection titles, make sure that the catalog record reflects this, mark it subject, illustrator, author (LGBTIQQ) then it is in the catalog and searchable.

Tools to aid in collection development include:

*Collection HQ* view wholistically, case studies, tags DE topics, break down by formats, tracks over time. Baker & Taylor cart analysis of diversity by subject headings. ILS reports, then you can move into a spreadsheet. Savannah by Orange Boy is a great tool, it can tell us who in our community is using which parts of these collections.

[Collectionteam@oppl.org](mailto:Collectionteam@oppl.org)

By not checking out to display, instead changing home location on items, it is then traceable on CHQ for statistics.

### **It's not okay. It's not normal. Sexual harassment of librarians and implications for the field.**

This program was a report on a study on this topic. The fact finding and way the report was conducted was discussed. There was time for questions and discussion. In conclusion, a call to action from ALA was requested. Awareness, training for both staff and administration were discussed as the best way to help those in this situation. The summary is below:

Slides of the presentation:

<https://www.eventscribe.com/2015/APP/PresentationSlides/slideShareV3.asp?sfp=MTkwNDN8MjYxOTcxMnw2MjM1NTEzMHwtMQ==&SlidesID=404110>

How does sexual harassment in libraries affect the psychological safety of workers? Why is it so normalized? And what can we do about it?

Spurred by the #MeToo and #TimesUp movements, we surveyed librarians in 2018 and 2022 to assess the prevalence of sexual harassment in our field. The results revealed that more than three-fourths of respondents had experienced sexual harassment from co-workers, patrons, or both.

We were not surprised by our findings; while ours was the first study to use a validated tool, we were familiar with more anecdotal evidence. What we did not expect from our survey was the number of respondents who contacted us individually. In our first study, we had used an established instrument that collected solely quantitative data; there was no opportunity to



provide comments. But our solicitation of their experiences led numerous librarians and library staff to email us directly to share their stories. When we presented our research, we had similar experiences. People in the audience did not need our statistics to convince them that sexual harassment is prevalent in our field; many came to bear witness to the trauma they had either experienced or witnessed.

In response, when we ran the same survey in 2022, we added one feature: a comment box at the end. While not a required element of the survey, about a quarter of respondents chose to write something in the box. Some were words of gratitude that we were amplifying this very real problem in librarianship, but many were personal narratives. The result, as one of our authors said, was “twenty-plus pages of tragedy.”

Join us as we discuss our studies, with an eye towards starting conversations among managers and leaders about how to better protect and support our colleagues.

### **Learning Objectives:**

1. Define sexual harassment to recognize when it is happening at your library
2. Discuss the impact of sexual harassment on psychological safety to advocate for policies to protect employees
3. Strategize ways to have conversations with colleagues to lessen the normalization of sexual harassment

### **Author Programs**

Amanda Jones: *That Librarian*  
The Fight Against Book Banning in America

Listened to Amand Jones, author of *That Librarian*. A school librarian in the small Louisiana town where she was raised. She spoke up against censorship at a public meeting, as a resident not as a middle school librarian. She has been harassed, doxed, and cannot attend her children’s sporting events without being verbally abused. Spoke of the of freedom to read, of free access to information. There are suggestions on activism and calls to action in the back of the book.

Elyse Graham: *Book and Dagger: How Scholars and Librarians Became the Unlikely Spies of World War II*

True story of librarians saved the world as secret agents. Thrillingly paced and rigorously researched, *Book and Dagger* is an inspiring and gripping true story about a group of academics who helped beat the Nazis—a tale that reveals the indelible power of humanities to change the world.

Lydia Reeder: *The Cure for Women: Dr. Mary Putnam Jacobi and the Challenge to Victorian Medicine that Changed Women's Lives Forever.*

How Victorian male doctors used false science to argue that women were unfit for anything but motherhood—and the brilliant doctor who defied them. Women's ills all come from their uterus. Migraines from childbirth or hormones. Women's heads are too small for intelligence but just large enough for love. More women began asking for women doctors for a fair chance for the girls. Mary Putnum in NYC, loved science, was the first woman pharmacist, and the first woman doctor at the Sorbonne.

Kate also spoke with several authors including Seattle Civic Poet Anastacia-Renée Tolbert who may do a program for us next year; Pulitzer Prize winning author Dave Eggers, a Lake Forest native who this year received a Newbery Award for his middle grade book *The Eyes and the Impossible* and Edward Underhill, a debut Fiction author from Kenosha.

### Upcoming Meetings/Events

Monday, September 9, 7 pm – 8 pm	The History of the Beatles in One Hour
Thursday, September 12 – Sunday, September 15	Friends 48 <sup>th</sup> Annual Book Sale, Lake Forest Recreation Center
Thursday, September 19, 7 pm – 8.30 pm	The Past, Present, & Future of the Evil Robot: An Introduction to Artificial Intelligence, Ethics, and Social Transformation (first in 3-part series)
Sunday, September 22, 2024, 2 pm – 3 pm	Friends Appreciation and Murals Celebration with Parma Conservation

## TOP TEN CIRCULATING ITEMS IN July 2024

### By Format & Audience

e-Books			
Position	Title	Author	Circulation
1	<i>The Women</i>	Hannah, Kristin	33
2	<i>Funny Story</i>	Henry, Emily	27
3	<i>Table for Two: Fictions</i>	Towles, Amor	21
4	<i>Just for the Summer</i>	Jimenez, Abby	18
5	<i>Swan Song</i>	Hilderbrand, Elin	17
6	<i>The Heaven &amp; Earth Grocery Store</i>	McBride, James	17
7	<i>Tom Lake</i>	Patchett, Ann	15
8	<i>All the Colors of the Dark</i>	Whitaker, Chris	14
9	<i>First Lie Wins</i>	Elston, Ashley	14
10	<i>Hillbilly Elegy*</i>	Vance, J. D.	14
11	<i>The Demon of Unrest*</i>	Larson, Erik	14

\* Denotes nonfiction

e-Audiobooks			
Position	Title	Author	Circulation
1	<i>Funny Story</i>	Henry, Emily	28
2	<i>The Women</i>	Hannah, Kristin	23
3	<i>The Anxious Generation*</i>	Haidt, Jonathan	17
4	<i>First Lie Wins</i>	Elston, Ashley	16
5	<i>The Heaven &amp; Earth Grocery Store</i>	McBride, James	16
6	<i>The Midnight Feast</i>	Foley, Lucy	16
7	<i>Hillbilly Elegy*</i>	Vance, J. D.	14
8	<i>Listen for the Lie</i>	Tintera, Amy	14
9	<i>The Paradise Problem</i>	Lauren, Christina	14
10	<i>None of This Is True</i>	Jewell, Lisa	12
11	<i>The Five-Star Weekend</i>	Hilderbrand, Elin	12

\* Denotes nonfiction

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**Adult Books**

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Position	Title	Author	Circulation
1	<i>Swan Song</i>	Hilderbrand, Elin	22
2	<i>Tom Lake</i>	Patchett, Ann	17
3	<i>Hillbilly Elegy*</i>	Vance, J. D.	18
4	<i>The Heaven &amp; Earth Grocery Store</i>	McBride, James	16
5	<i>James</i>	Everett, Percival	15
6	<i>A Gentleman in Moscow</i>	Towles, Amor	13
7	<i>Marrying the Ketchups</i>	Close, Jennifer	12
8	<i>One Perfect Couple</i>	Ware, Ruth	12
9	<i>You Like it Darker: Stories</i>	King, Stephen	11
10	<i>Hello Beautiful</i>	Napolitano, Ann	11

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\*Denotes nonfiction

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**Teen Books**

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Position	Title	Author	Circulation
1	<i>The Promised Neverland</i>	Shirai, Kaiu	16
2	<i>The Summer I Turned Pretty</i>	Han, Jenny	12
3	<i>Solo Leveling</i>	Chugong	11
4	<i>Spy x Family</i>	Endō, Tatsuya	11
5	<i>Witch Hat Atelier</i>	Shirahama, Kamome	11
6	<i>Scythe</i>	Shusterman, Neal	10
7	<i>Throne of Glass</i>	Maas, Sarah J.	8
8	<i>Persona 5</i>	Murasaki, Hisato	8
9	<i>The Selection</i>	Cass, Kiera	7
10	<i>To All the Boys I've Loved Before</i>	Han, Jenny	7

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Children's Books			
Position	Title	Author	Circulation
1	<i>Escape from Mr. Lemoncello's Library: The Graphic Novel</i>	Grabenstein, Chris	17
2	<i>Claudia and the Bad Joke</i>	Nopra, Arley	15
3	<i>No Brainer</i>	Kinney, Jeff	14
4	<i>Stacey's Mistake</i>	Crenshaw, Ellen T.	13
5	<i>The Deep End</i>	Kinney, Jeff	13
6	<i>The Inheritance Games</i>	Barnes, Jennifer Lynn	12
7	<i>Squish</i>	Holm, Jennifer L.	12
8	<i>Diper Överlöde</i>	Kinney, Jeff	12
9	<i>The Ugly Truth</i>	Kinney, Jeff	12
10	<i>5-Minute Horse Stories</i>		12

Non-Book Items		
Position	Title	Circulation
1	Mobile Hotspot	30
2	Children's Book Bag	26
3	<i>Arthur the King (DVD)</i>	16
4	<i>The Fall Guy (DVD)</i>	16
5	Nintendo Switch Console	15
6	<i>The Ministry of Ungentlemanly Warfare (DVD)</i>	14
7	<i>Kung Fu Panda 4 (DVD)</i>	14
8	<i>Ghostbusters. Frozen Empire (DVD)</i>	13
9	<i>The Long Game (DVD)</i>	13
10	<i>The Beekeeper (DVD)</i>	12



### Service Statistics for July 2024

	July 2024	July 2023	YTD FY 2025	YTD FY 2024
Library Visits	<b>15,431</b>	13390	<b>46,458</b>	39,202
Physical Items circulated	<b>24,938</b>	23764	<b>67,654</b>	64,645
E-Media Circulated	<b>8,820</b>	8,994	<b>25,717</b>	25,307
Database Uses	<b>13,469</b>	10,636	<b>41,071</b>	31,906
Library Programs & Attendees**	<b>50/2,549</b>	68/2,808	<b>148/6,487</b>	189/5,788
Media Lab, Appts, and Tutorials	<b>99</b>	31	<b>207</b>	134
Reference Questions	<b>2,738</b>	2,633	<b>7,376</b>	7,587
New Library Cards Issued	<b>145</b>	134	<b>384</b>	398
Items added to collection	<b>1,127</b>	1,090	<b>3,181</b>	3,084
Items withdrawn from collection	<b>1,658</b>	848	<b>3,926</b>	2,875

\*To conform to Illinois Public Library Annual Report (IPLAR) reporting guidelines, starting in FY 2025, Freegal statistics are reported with Database Use and not with E-Media Circulation.

\*\*Includes passive programs and take-home activities