

BLOOMINGTON PUBLIC LIBRARY
BOARD OF TRUSTEES MEETING

January 21, 2014
4:30 p.m.

Agenda

- I. Call to Order
- II. Roll Call
- III. Introductions/Public Comment
- IV. Approval of Minutes
 - A. December 17, 2013
- V. President's Report
- VI. Discussion with Mayor Tari Renner
- VII. Director's Report
- VIII. Fiscal Report
- IX. Approval of Bills
- X. Committee Reports
 - A. Budget & Personnel
 - B. Planning, Policies & Programs (3 P's)
 - 1. Recommend Approval of Art Week Event
 - 2. Recommend Approval of FOIA Policy
 - 3. Recommend Approval of Video Surveillance Policy
 - 4. Recommend Approval of Library Circulation Policy
- XI. Unfinished Business
- XII. New Business
 - A. Approve Recommendation to Foundation to Fund up to \$3000.00 for Staff Development Day
 - B. Approve Bookmobile Proposal
 - C. Approve Request for Bid for Heating & Controls Project
 - D. Discussion of New Ordinance on Term Limits
- XIII. Adjournment

Bloomington Public Library
Board of Trustees Meeting

December 17, 2013

4:30 p.m.

Minutes

I. Call to Order

Vice-President Bowles called the meeting to order at 4:30 p.m.

II. Roll Call

MEMBERS PRESENT: Patsy Bowles, Emily Kelahan, Jan Kibler, Joni Painter, Cathy Pratt, Bill Wetzel

MEMBERS ABSENT: Peggy Burton, Narendra Jaggi, Carol Koos

OTHERS PRESENT: Scott Black, Janet Blue, Georgia Bouda, Adrienne Ives, Kathy Jeakins, Patricia Marton, Caprice Prochnow

III. Introductions/Public Comment

Vice-President Bowles introduced Bloomington residents, Patricia Marton and Janet Blue. Janet Blue commented that she had visited the Bloomington Public Library a few times a number of years ago and did not feel safe at the Library. She went on to say that she would like to see a branch added for the Library.

Patricia Marton commented that she has had some unpleasant experiences at the Library, that it is very congested, and an expansion is needed.

IV. Approval of Minutes

A. November 19, 2013

JAN KIBLER MOVED, EMILY KELAHAN SECONDED, TO APPROVE THE MINUTES FROM THE NOVEMBER 19, 2013 MEETING. THE MOTION CARRIED UNANIMOUSLY.

V. President's Report

Vice-President Bowles shared with Board members that by the looks of the Incident/Suspension report that she is thankful for the security presence at the Library.

VI. Director's Report

Director Bouda shared that the Library is ordering new fleece jackets. They are \$25.00 each and are available in three different colors.

Director Bouda distributed a copy of an Ordinance drafted by City Council that will establish term limits for members on all of the City Boards and Commissions. Members would be limited to serving 9 consecutive years or in the case of the BPL Board, it would be three consecutive three year terms.

VII. Fiscal Report

Kathy Jeakins stated that the final Property Tax Distribution for the year was received, and it was a little over \$125,000.00. She went on to say, that brings us to just about \$5,400.00 short for the year, which is very good. She entertained questions.

VIII. Approval of Bills

BILL WETZEL MOVED, CATHY PRATT SECONDED, TO APPROVE THE BILLS LIST FROM NOVEMBER 2013. THE MOTION CARRIED UNANIMOUSLY.

See Attachment "2013.12"

IX. Committee Reports

A. Budget & Personnel

1. Recommend Approval of Director's Evaluation Procedures

Chair Bill Wetzel shared that revisions had been made to the procedures that were recommended by the Board at the last meeting, and the Budget & Personnel Committee recommends approval of the Director's Evaluation Procedures.

BILL WETZEL MOVED, NO SECOND NEEDED, TO APPROVE THE DIRECTOR'S EVALUATION PROCEDURES. THE MOTION CARRIED UNANIMOUSLY.

See Attachment "IX.A.1."

2. Recommend Approval of 2014 Insurance Policies

Chair Bill Wetzel shared that the insurance expires at the end of the year. Three quotes were received and a comparison was drawn up for the B&P Committee. The committee decided to engage the insurance consultant that the Library used last year. Mike Nugent reviewed the proposals and recommended the Van Gundy proposal.

BILL WETZEL MOVED, CATHY PRATT SECONDED, TO APPROVE THE 2014 INSURANCE QUOTE FROM VAN GUNDY INSURANCE CONSISTING OF PROPERTY (INCLUDING LIABILITY, ABUSE MOLESTATION, EXCESS & CRIME), AUTO, DIRECTOR'S & OFFICERS, AND WORKERS COMPENSATION FOR A TOTAL OF \$30,005.00.

AYES: PATSY BOWLES, EMILY KELAHAN, JAN KIBLER, JONI PAINTER, CATHY PRATT, BILL WETZEL

NAYES: NONE

ABSENT: PEGGY BURTON, NARENDRA JAGGI, CAROL KOOS

THE MOTION CARRIED ANIMOUSLY.

See Attachment "IX.A.2."

B. Planning, Policies & Programs (3 P's)

The 3 P's Committee did not meet.

Chair Patsy Bowles asked Committee members to consider meeting on January 7, 8 or 9 at 4:30 p.m., as the Art Week needs to be finalized along with a number of policies that need to be reviewed.

X. Unfinished Business

There was no unfinished business.

XI. New Business

A. Approve 2014 Meeting Dates

BILL WETZEL MOVED, JAN KIBLER SECONDED TO APPROVE THE 2014 MEETING DATES. THE MOTION CARRIED UNANIMOUSLY.

XII. Adjournment

Vice-President Bowles adjourned the meeting at 5:16 p.m.

Next Meeting Date

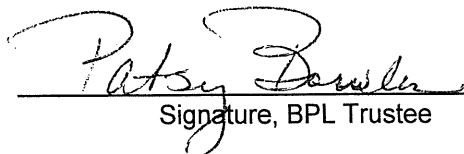
January 21, 2014

2013.12

APPROVAL OF BILLS

BILLS LIST

Approved by BPL Board of Trustees, December 17, 2013



Signature, BPL Trustee

Vendor	Line Item	Amount
Ameren IP	Electricity	6,913.72
Bibliotheca, LLC	Library Supplies	3,894.20
Bloomington Normal Sunrise Rotary	Membership Dues	300.00
Bound to Stay Bound Books	Juvenile Books	130.42
Brodart Company	Library Supplies	157.80
CDW Government	Computer Supplies	1,688.51
Cengage Learning	Adult Books	1,912.47
City of Bloomington	Dental Insurance	829.68
City of Bloomington	FICA	10,613.29
City of Bloomington	Fuel	699.59
City of Bloomington	Health Insurance-HMO	7,542.84
City of Bloomington	Health Insurance-PPO	16,595.92
City of Bloomington	IMRF	22,411.74
City of Bloomington	Life Insurance	241.77
City of Bloomington	Medicare	2,482.09
City of Bloomington	Payroll	173,272.22
City of Bloomington	Vision Insurance	196.78
City of Bloomington	Wate	704.04
Community Players Theatre	Advertising	220.00
Computype, Inc.	Library Supplies	1,172.93
Cummins Midstate	Vehicle Maintenance	195.54
Custom Digital Imaging	Printing/Binding	703.75
C W Associates	Adult Books	38.00
Dell Marketing, L.P.	Computer Supplies	832.30
Demco	Library Supplies	403.00
Ela Area Public Library	Miscellaneous Expenses	8.99
Frontier	Telecommunications	1,671.03
H-O-H Water Technology, Inc.	Building Maintenance	377.08
Illinois State University	Advertising	375.00
Illinois State University	Other Purchased Services	420.33
Illinois Wesleyan University	Other Purchased Services	1,037.16
JanWay Company USA, Inc.	Library Supplies	279.35
Kavanagh, Scully, Sudow, White & Frederick, P.C.	Other Purchased Services	45.00
Kessenich, Thomas	Building Mtnc Supplies	845.60
Leary, Donna	Travel	6.22
LimeLight Communications, Inc.	Advertising	200.00
McLean County Chamber of Commerce	Membership Dues	575.00
Mid Illinois Mechanical Services, Inc.	Building Maintenance	2,079.97
Midwest Tape	A/V Materials	2,045.60
Miller Janitorial Supply	Janitorial Supplies	564.97
Nicor/Northern Illinois Gas	Natural Gas	1,235.18
Officemax	Computer Supplies	669.75
Officemax	Copier Supplies	339.75

Officemax
 Officemax
 Pantagraph Publishing
 Penworthy Co.
 Pilot Media, LLC
 Proquest. LLC
 Rainbow Book Co.
 Random House, Inc.
 Record Systems, Inc.
 Recorded Books. LLC
 Ricoh, USA, Inc.
 Ricoh, USA, Inc.
 Ron Smith Printing Co
 Simplex Grinnell
 Stumpf, Gerald (ID Cards Unlimited)
 Taylor, Pamela (Seastar Aquascapes)
 ThyssenKrupp Elevator Corp.
 Unique Management Services, Inc.
 U S Postal Service
 Vernon Library Supplies, Inc.
 VISA - 1000Bulbs.com
 VISA - Abe Books
 VISA - Ace-Hi Glass
 VISA - American Flagpole & Flag Supplies
 VISA - Amazon Marketplace
 VISA - Amazon Marketplace
 VISA - Amazon.com
 VISA - Amazon.com
 VISA - Baker & Taylor Books
 VISA - Baker & Taylor Books
 VISA - Baker & Taylor Books
 VISA - Baker & Taylor Books
 VISA - Barnes & Noble
 VISA - Business Furniture, LLC
 VISA - Demco
 VISA - Denny's Doughnuts
 VISA - Dollar Tree
 VISA - Dollar Tree
 VISA - Dollar Tree
 VISA - Don Smith Paint Co.
 VISA - Eastland Suites
 VISA - Farm & Fleet
 VISA - Fazoli's
 VISA - Five Star Water
 VISA - FontSpring.com
 VISA - Hobby Lobby
 VISA - Hobby Lobby
 VISA - HR Direct
 VISA - Illinois Library Association
 VISA - Ingram
 VISA - Interstate All Battery Center
 VISA - JoAnn Fabrics
 VISA - Lowe's
 VISA - McLeod
 VISA - Medici
 VISA - Medici

Employee Relations	207.73
Office Supplies	622.22
Printing/Binding	248.70
Juvenile Books	171.61
Advertising	360.00
Public Access Software	4,585.00
Juvenile Books	1,030.25
A/V Materials	108.00
Office/Equipment Mtn	2,925.00
A/V Materials	227.80
Office/Equipment Mtn	109.22
Rentals	1,744.00
Printing/Binding	370.00
Building Maintenance	3,419.00
Library Supplies	1,161.45
Other Purchased Services	50.00
Building Maintenance	27.21
Other Purchased Services	644.40
Postage	2,254.00
Library Supplies	7,066.21
Building Mtn Supplies	464.34
Adult Books	54.98
Building Mtn Supplies	40.00
Office Supplies	99.95
A/V Materials	338.30
Adult Books	38.99
A/V Materials	602.48
Adult Books	105.25
A/V Materials	8,489.62
Adult Books	7,350.09
Juvenile Books	4,532.72
Professional Collection	1,835.00
Other Purchased Services	7.96
Other Purchased Services	187.50
Library Supplies	60.06
Other Purchased Services	15.00
Employee Relations	3.00
Office Supplies	18.00
Other Purchased Services	1.00
Building Mtn Supplies	128.40
Other Purchased Services	61.60
Janitorial Supplies	87.02
Employee Relations	(47.87)
Miscellaneous Expenses	138.80
Office/Equipment Mtn	35.00
Library Supplies	6.99
Other Purchased Services	29.90
Office Supplies	136.05
Membership Dues	100.00
Adult Books	1,244.58
Building Mtn Supplies	48.80
Library Supplies	23.46
Building Mtn Supplies	78.00
Telecommunications	123.23
Other Purchased Services	19.76
Travel	54.97

VISA - Meijer
 VISA - Mini Science
 VISA - Murphy at Wal-Mart
 VISA - National Enquirer
 VISA - NRS
 VISA - Officemax
 VISA - Office Depot
 VISA - Office Depot
 VISA - Pantagraph
 VISA - Papa John's Pizza
 VISA - Paypal*COSUGI
 VISA - Paypal*Look Magazine
 VISA - Radio Stations WDQZ, WRPW
 VISA - Sprint
 VISA - Toys R Us
 VISA - UPS
 VISA - USPS
 VISA - Valve Software
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart.com

Total

Employee Relations	45.58
Computer Supplies	127.48
Fuel	23.06
Periodicals	101.40
Other Purchased Services	88.80
Library Supplies	64.12
Library Supplies	37.80
Office Supplies	40.00
Periodicals	259.93
Other Purchased Services	85.85
Membership Dues	100.00
Periodicals	35.80
Advertising	400.00
Telecommunications	309.34
Library Supplies	53.94
Postage	13.70
Postage	47.34
Public Access Software	229.95
Employee Relations	139.00
Janitorial Supplies	35.48
Library Supplies	101.07
Miscellaneous Expenses	68.95
Office/Equipment Mtn	15.00
Office Supplies	166.32
Other Purchased Services	43.64
Janitorial Supplies	12.27

323,419.13

Bloomington Public Library (BPL)
Director Evaluation Procedures
Updated: 1/14/14

The BPL Director salary adjustment is scheduled for May 1 of each year.

A decision regarding merit salary adjustment shall be made and presented to the Library Director. The cost of living adjustment is established by the city.

The Budget & Personnel Committee (BPC) conducts the evaluation of the Library Director and will share a summary of information received from the Evaluation Tool used with the entire BPL Board along with the recommendation for the merit salary adjustment.

The summary information should include enough information to give board members, not in attendance at the committee discussion, a solid understanding of the comments and information included in the evaluation tool as well as other background information used by the BPC committee to make their recommendation.

An example of the summary could be a listing of the number of board members checking each evaluation indication (Very Good, Adequate, Needs Improvement) and the comments from each evaluation associated with each question.

The board shall be supportive of sharing the summary information with the Library Director to be used for feedback and inclusion in personnel file.

To meet the May 1 date, the following timeline is suggested:

- Beginning of March - Budget & Personnel Committee (BPC) shares point person and specific timeline dates for the evaluation process. The Director evaluation instrument is sent to all board members to complete their Director evaluation input.
- Mid-March – Board member Director evaluation instrument due to the BPC point person
- End of March – BPC point person consolidates information
- Early April - BPC discusses Director evaluation input and determines merit recommendation
- Late April – BPC shares consolidated feedback and merit recommendation with the BPL board. Decision regarding merit for Director finalized.

2014 Insurance Quotes for Bloomington Public Library

The Budget & Personnel Committee requested more information regarding the comparison of the quotes. Georgia contacted Mike Nugent, Insurance Consultant, who will review the quote from Chubb and the quote from Selective. His findings will be available by the Board meeting, 12/17/13.

PROPERTY INSURANCE	Selective	Chubb	
Property	5,584.00	16,474.00	
Umbrella	1,157.00	2,454.00	
Inland Marine	1,970.00	Inc in Property	
General Liability	2,543.00	4,880.00	
* Abuse Molestation	995.00	Was Not Quoted	
Crime		640.00	
Total	12,249.00	24,448.00	
 AUTO INSURANCE	 Selective	 Chubb	
Business Auto	1,639.00	5,946.00	
 D & O INSURANCE	 Selective	 Chubb	
	4,889.00	5,524.00	
 WORKER'S COMPENSATION	 Selective	 Zenith	 Northern Illinois
	11,228.00	14,377.00	11,657.00
 GRAND TOTAL	 30,005.00	 50,295.00	 11,657.00

* This coverage has been suggested, but is not required

Bloomington Public Library

2014 Insurance Renewal

Premiums	Expiring	Snyder	Van Gundy
Property	\$ 14,958	\$ 16,474	\$ 14,384
Liability	\$ 4,613	\$ 4,880	\$ 3,538
Auto	\$ 5,471	\$ 5,946	\$ 1,639
Umbrella	\$ 2,251	\$ 2,454	\$ 1,157
Subtotal	\$ 27,293	\$ 29,754	\$ 20,718
Crime	\$ 640	\$ 640	Included
WC	\$ 21,021	\$ 14,377	\$ 11,228
D&O / EPL	\$ 4,289	\$ 5,524	\$ 4,889
Subtotal	\$ 25,950	\$ 20,541	\$ 16,117
Grand Total	\$ 53,243	\$ 50,295	\$ 36,835

Property			
Insured Values	\$ 15,746,186	\$ 15,746,186	\$ 15,662,000
Deductible	\$ 5,000	\$ 5,000	\$ 5,000
Equip Breakdown	Included	Included	Included
Bus Income	\$ 95,000	\$ 95,000	\$ 100,000
Valuable Papers	\$ 3,341,519	\$ 3,341,519	\$ 3,241,519
VP Deductible	\$ 5,000	\$ 5,000	\$ 5,000
Flood	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
Flood Deductible	\$ 50,000	\$ 50,000	\$ 50,000

Auto			
Liability limit	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
Comp Ded	\$ 3,000	\$500 / \$3,000	\$500/500
Collision Ded	\$ 3,000	\$1,000 / \$3,000	\$1,000/1,000
Med Pay	\$ 5,000	5000	\$ 5,000

Liability			
General Liability Limit	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
D&O Limit	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000
Umbrella Limit	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000
EPL Limit	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000

BLOOMINGTON PUBLIC LIBRARY
BOARD OF TRUSTEES
2014

Meetings begin at 4:30 p.m.
In the Bloomington Public Library Board Room

January 21, 2014

February 18, 2014

March 18, 2014

April 15, 2014

May 20, 2014

June 17, 2014

July 15, 2014

August 19, 2014

September 16, 2014

October 14, 2014

November 18, 2014

December 16, 2014

Bloomington Public Library

Director's Report

December 2014

1. Winter Weather

The Library was closed on January 5th and 6th due to the snow and extreme cold. The bookmobile also had to cancel some stops due to the weather.

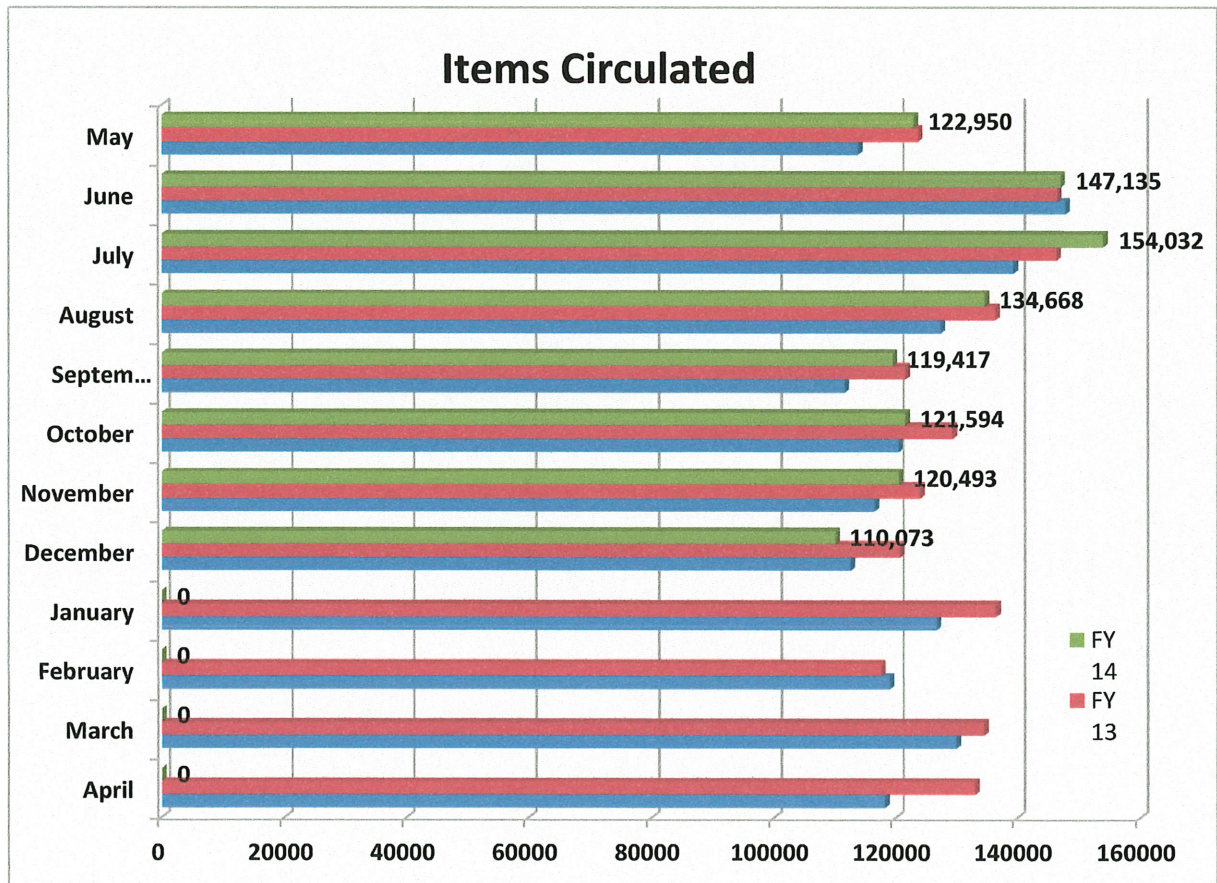
2. Bookmobile

The proposals were due on Friday, Jan. 10 at noon; we received three. Our consultant, Michael Swendrowski, reviewed the proposals via conference call with us on Monday, January 13th and his report which is in the packet includes a detailed comparison and recommendation to accept the Matthews Specialty Vehicle proposal. This is on the agenda for approval. Peggy Burton was able to attend.

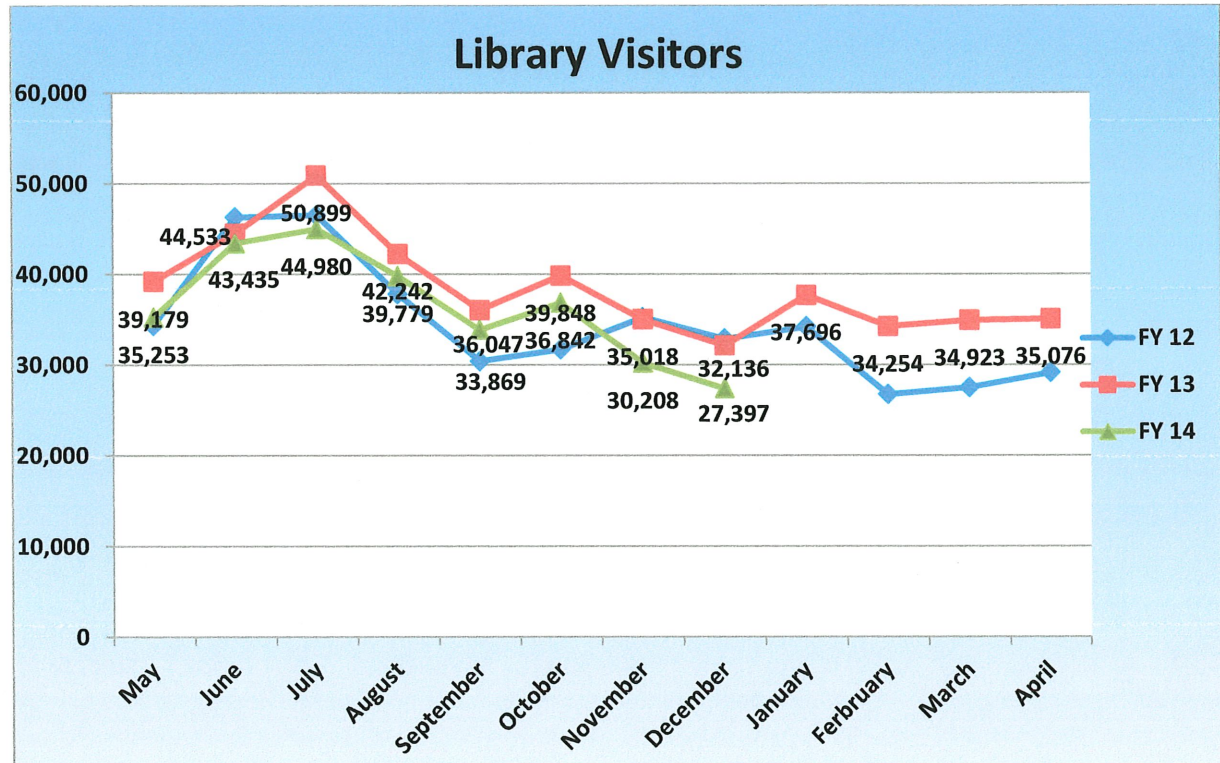
3. Grant for Heating Project

We have received notification from the Metropolitan Mayors Caucus that we have been awarded \$31,500 toward our boiler replacement. The drawings are completed and Caprice and I have met with Farnsworth to discuss the next steps. To make our deadlines, the Request for Bid must go out in January.

4. Statistics



The Library lent 110,073 items in December 2013 compared to 120,710 items lent in December 2012. There were 27,397 visitors to the Library and Bookmobile in December 2013, a decrease from the 32,136 visitors in December 2012.



Staff answered 3367 questions from customers this month.

Programs and Attendance in the month of December:

Children Programs and Attendance

300 crafts were made over winter break
 Toddler story time – 6 sessions – 151 attended
 Preschool story time – 4 sessions – 51 attended
 2nd Monday Story Club – 10 attended
 Tales for Tails (Read to Dogs) – 3 sessions – 31 attended
 Visited Katie's Kids – 72 attended
 Visited Brigham Head Start – 64 attended
 Visited Little Jewels Day Care – 99 attended
 Recruitment has begun for the Prime Time Family Literacy program.

Teen Programs and Attendance

Teen Advisory Board – 1 session – 0 attended
 Anime Now – 1 session – 9 attended

Project Next Generation: Build a Solar Car – 2 sessions – 24 attended

Homemade hot chocolate and marshmallows – 1 session – 8 attended

The Teen Librarian went to the following schools and promoted books to the teens:

Chiddix Junior High: 72

Kingsley Junior High: 30 & 40 (2 visits)

Parkside Junior High: 106

Evans Junior High: 41

Adult Programs and Attendance

Fiction & Mystery Book Clubs combined – 1 session – 8 attended

Nonfiction Book Club – 1 session – 4 attended

Movie Discussion – 1 session – 6 attended

Wednesday Night Movies – 3 sessions – 29 attended

Christmas Tree Ship – 1 session – 12 attended

There were 9 requests for individual appointments with customers this month. Topics included the usual of job applications, resumes, email, basic computer & Internet skills, and ereaders. Additionally, we helped with library catalog searching, locating apartment rentals, and Photoshop

5. Celebration of India

The Celebration of India program has been rescheduled to Sunday, January 19 from 1:30 to 4 pm. This had to be cancelled the weekend of the tornados, so let's hope for good weather. There will be classical and folk dances of India at 1:30 and a Karnatic Music concert at 3pm. Little India Restaurant will sell boxed lunches for \$5.

Throughout the afternoon, people will be able to try on a sari, make crafts, and get a henna tattoo.

6. Art Week

The 3Ps Committee met on Jan. 7 and will recommend going ahead with plans for Art Week. The circulating art prints will be sold at a silent auction with a "buy it now" feature commencing at a wine and cheese event at the Library on Friday evening, May 16. Tickets will sell for not more than \$20 per person. The silent auction will continue through the next week in the Community Room.

7. Bi Focal Kits

A letter was sent to all of the senior living facilities in Bloomington in early January. The response was excellent and all of the kits have been given away. I am so happy that they have all found good homes.

Respectfully submitted,
Georgia Bouda, Director



Executive Director

Henry Bayer

**Executive
Vice Presidents**

Lori Laidlaw

Dorinda Miller

Carmin Willis-Goodloe

Yolanda Woods

Secretary

Patricia Ousley

Treasurer

Robert Fand

Executive Board

Gloria Arseneau

Garry Cacciopaglia

Gary Ciacio

Dave Delrose

Safiya Felters

Randy Hellmann

Mark Kerr

Gary Kroeschel

Kathy Lane

Ellen Larrimore

Matthew Lukow

Chris Milton

Steve Mittons

Duane Montgomery

David Morris

Steve Nordyke

Ralph Portwood

Cary Quick

John Rayburn

Kobie Robinson

Ruby Robinson

Yurvette Simmons

Eva Spencer-Chatman

Mike Turner

Cameron Watson

Trudy Williams

Retiree President

Larry Brown

Trustees

Carlene Erno

Tom Minick

Miguel Vazquez

December 31, 2013

Bloomington Public Library Board
205 East Olive
Bloomington, IL 61702

Certified Mail, R. R. R.

No. 7011 2970 0003 6440 2440

RE: Contract Negotiations
Bloomington Public Library

Attention: President

By this letter, and in accordance with the provisions of the Collective Bargaining Agreement, AFSCME Council 31 notifies you of its desire to amend or modify the Agreement.

I will contact you in the near future to arrange a mutually acceptable time and place to meet with you and/or your representatives.

Sincerely,

Renee Nestler
Staff Representative
AFSCME Council 31

cc: Illinois Labor Relations Board
Mike Newman, Associate Director, Council 31
Kent Beauchamp, Regional Director, Council 31
President of AFSCME Local 699
Local File

BLOOMINGTON PUBLIC LIBRARY
FY 2014 FISCAL REPORT

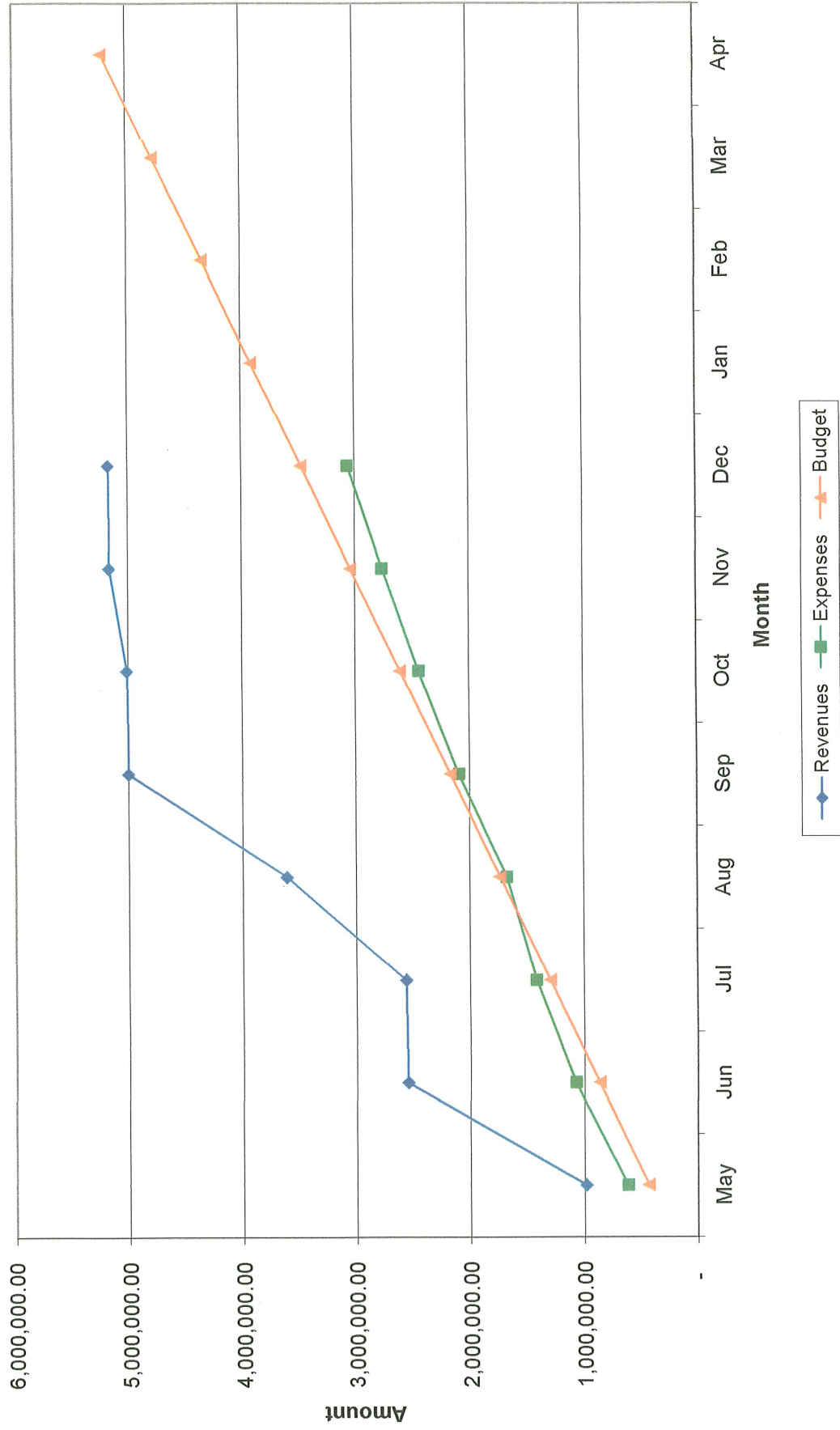
REVENUES:

ACCT NAME	BUDGET	DEC 2013	YR-TO-DATE	AMOUNT OVER/UNDER	% RECEIVED
Property Tax	4,513,477	0.00	4,508,035.24	(5,441.76)	99.9
Replacement Tax	130,400	0.00	130,400.00	0.00	100.0
State Grants	77,000	0.00	78,728.27	1,728.27	102.2
GPPLD	380,000	0.00	363,927.62	(16,072.38)	95.8
Fees & Rentals	80,000	6,528.90	58,094.46	(21,905.54)	72.6
Copies	3,600	202.30	2,704.70	(895.30)	75.1
Interest on Investments	3,000	64.18	501.10	(2,498.90)	16.7
Interest from Taxes	0	52.18	52.18	52.18	-----
Sale of Property	1,000	0.00	805.00	(195.00)	80.5
Donations	10,000	125.00	4,078.08	(5,921.92)	40.8
Other Private Grants	0	0.00	1,000.00	1,000.00	-----
Cash Over/Short	0	18.26	(6.75)	(6.75)	-----
Other	14,000	2,457.25	27,404.00	13,404.00	195.7
Total Revenues	5,212,477	9,448.07	5,175,723.90	(36,753.10)	99.3

ACCT NAME	BUDGET	DEC 2013	YR-TO-DATE	AMOUNT OVER/UNDER	% SPENT
Full-Time Salaries	1,877,650	141,196.23	1,181,362.85	(696,287.15)	62.9
Part-Time Salaries	381,725	27,535.44	220,693.84	(161,031.16)	57.8
Seasonal Salaries	35,990	959.07	30,552.37	(5,437.63)	84.9
Overtime Salaries	1,100	0.00	0.00	(1,100.00)	0.0
Other Salaries	0	0.00	40,929.12	40,929.12	-----
Total Sals & Wages	2,296,465	169,690.74	1,473,538.18	(822,926.82)	64.2
Dental Insurance	11,050	845.44	6,755.74	(4,294.26)	61.1
Vision Insurance	2,600	192.74	1,571.90	(1,028.10)	60.5
Health Insurance, BC/BS PPO	234,700	16,595.92	137,393.44	(97,306.56)	58.5
Health Insurance, OSF HMO	79,100	7,956.08	61,184.22	(17,915.78)	77.4
Life Insurance	3,900	229.54	1,920.15	(1,979.85)	49.2
IMRF	299,300	21,842.62	204,106.37	(95,193.63)	68.2
FICA	142,320	9,907.75	90,000.31	(52,319.69)	63.2
Medicare	33,290	2,317.24	21,048.78	(12,241.22)	63.2
Worker's Comp	30,000	0.00	0.00	(30,000.00)	0.0
Uniforms	600	0.00	60.79	(539.21)	10.1
Tuition Reimb	10,000	0.00	0.00	(10,000.00)	0.0
Other Benefits	30,000	0.00	0.00	(30,000.00)	0.0
Total Benefits	876,860	59,887.33	524,041.70	(352,818.30)	59.8
Rentals	26,000	1,954.00	12,163.99	(13,836.01)	46.8
Total Rentals	26,000	1,954.00	12,163.99	(13,836.01)	46.8
Building Mtnc	125,000	8,005.63	30,897.80	(94,102.20)	24.7
Vehicle Mtnc	20,000	11.97	1,653.84	(18,346.16)	8.3
Office & Computer Mtnc	155,000	3,034.22	138,796.41	(16,203.59)	89.5
Other Mtnc	25,000	0.00	811.37	(24,188.63)	3.2
Total Repair/Mtnc	325,000	11,051.82	172,159.42	(152,840.58)	53.0

ACCT NAME	BUDGET	DEC 2013	YR-TO-DATE	AMOUNT OVER/UNDER	% SPENT
Advertising	15,000	840.00	8,776.90	(6,223.10)	58.5
Printing/Binding	17,000	3,887.43	13,724.87	(3,275.13)	80.7
Travel	13,200	0.00	1,102.94	(12,097.06)	8.4
Membership Dues	8,500	905.00	3,534.00	(4,966.00)	41.6
Professional Development	12,000	425.00	2,284.00	(9,716.00)	19.0
Other Purchased Services	90,000	1,889.48	30,178.57	(59,821.43)	33.5
Property Insurance	25,000	0.00	(48.00)	(25,048.00)	-0.2
Vehicle Insurance	6,000	0.00	0.00	(6,000.00)	0.0
Other Insurance	3,600	0.00	0.00	(3,600.00)	0.0
Total Purchased Services	190,300	7,946.91	59,553.28	(130,746.72)	31.3
Office Supplies	52,000	688.85	4,916.22	(47,083.78)	9.5
Computer Supplies	80,000	2,118.29	17,441.22	(62,558.78)	21.8
Copier Supplies	6,000	175.05	1,705.17	(4,294.83)	28.4
Postage	28,000	2,366.88	2,983.93	(25,016.07)	10.7
Library Supplies	77,500	5,355.87	38,467.68	(39,032.32)	49.6
Janitorial Supplies	13,500	975.77	8,699.56	(4,800.44)	64.4
Gas & Diesel Fuel	8,000	2,044.64	5,615.27	(2,384.73)	70.2
Building Mtnc & Repair Supplies	7,500	31.98	5,198.40	(2,301.60)	69.3
Total Supplies	272,500	13,757.33	85,027.45	(187,472.55)	31.2
Natural Gas	40,000	3,097.88	16,305.41	(23,694.59)	40.8
Electricity	105,000	5,902.50	54,556.99	(50,443.01)	52.0
Water	7,500	594.58	6,104.44	(1,395.56)	81.4
Telecommunications	30,000	1,911.01	16,033.35	(13,966.65)	53.4
Total Utilities	182,500	11,505.97	93,000.19	(89,499.81)	51.0
Professional Collection	7,000	1,835.00	3,576.92	(3,423.08)	51.1
Total Prof Collection	7,000	1,835.00	3,576.92	(3,423.08)	51.1
Periodicals	32,000	14.99	18,781.44	(13,218.56)	58.7
Adult Books	165,300	10,166.61	106,948.37	(58,351.63)	64.7
Children's Books	120,300	3,985.55	74,853.53	(45,446.47)	62.2
A/V Materials	167,100	9,833.14	113,813.56	(53,286.44)	68.1
Public Access Software	178,800	4,588.00	116,025.95	(62,774.05)	64.9
Ebooks	33,300	0.00	0.00	(33,300.00)	0.0
Total Materials	696,800	28,588.29	430,422.85	(266,377.15)	61.8
Employee Relations	5,000	249.99	1,675.08	(3,324.92)	33.5
Miscellaneous Expenses	12,000	471.90	2,997.32	(9,002.68)	25.0
ERI Reimbursement	36,732	0.00	36,732.00	0.00	100.0
Fixed Asset Fund Transfer	170,768	0.00	170,768.00	0.00	100.0
To Capital Fund	114,552	0.00	0.00	(114,552.00)	0.0
Total Other Expenses	339,052	721.89	212,172.40	(12,327.60)	62.6
Total Expenses	5,212,477	306,939.28	3,065,656.38	(2,146,820.62)	58.8

BPL FY 2013-2014



EXPLANATIONS FOR VARIANCES IN EXCESS OF 5%
(Variance of 61.7% to 71.7% is acceptable)
December 2013

Property Tax (99.9%): The Library has received all of its distributions for the year.

Replacement Tax (100.0%): The Library received its total projected amount in July.

State Grants (102.2%): The Library received a little more than projected.

Golden Prairie (95.8%): The Library has received all of its distributions for the year.

Fees & Rentals (72.6%): This is higher than projected due to the success of the collection agency.

Copies (75.1%): Copies are higher than projected due to allowing the public to make color copies at a higher price than the black and white copies.

Interest on Investments (16.7%): Interest rates are still low.

Sale of Property (80.5%): The Library sold the older disc cleaner and some Summer Reading Program decorations.

Donations (40.8%): This is a little less than projected at this point.

Other (195.7%): This is over the projected amount due to the sale of items from the Book Shoppe.

Part-Time Salaries (57.8%): This is still under-spent because the retro and bonuses for employees were charged to another line item, Other Salaries.

Seasonal Salaries (84.9%): This is over-spent at this point because the Library hires Seasonal employees to help during the summer, thus most of the funds for this line item are expended during the summer months.

Overtime Salaries (0.0%): Nothing has been paid from this line item.

Dental Insurance (61.1%): This is under-spent because fewer staff enrolled in the program than projected.

Vision Insurance (60.5%): This is under-spent because fewer staff enrolled in this program than projected.

Health Insurance - PPO (58.5%): This is under-spent because fewer staff enrolled in this program than projected.

Health Insurance - HMO (77.4%): This is over-spent because more staff enrolled in this program than projected.

Life Insurance (49.2%): Charges have been minimal.

Worker's Compensation (0.0%): Nothing has been paid from this line item yet.

Uniforms (10.1%): Charges have been minimal.

Tuition Reimbursement (0.0%): Nothing has been paid from this line item yet.

Other Benefits (0.0%): Nothing has been paid from this line item yet.

Rentals (46.8%): Charges have been minimal.

Building Maintenance (24.7%): Charges have been minimal.

Vehicle Maintenance (8.3%): Charges have been minimal.
Office & Computer Maintenance (89.5%): This line item is over-spent because several one-time annual payments for Library services, i.e. database service, Collection HQ, etc. have been paid.
Other Property Maintenance (3.2%): Charges have been minimal.
Advertising (58.5%): Charges have been minimal.
Printing/Binding (80.7%): This is over-spent because we just paid for printing the most recent Program Guide.
Travel (8.4%): Charges have been minimal.
Membership Dues (41.6%): Charges have been minimal.
Professional Development (19.0%): Charges have been minimal.
Other Purchased Services (33.5%): Charges have been minimal.
Property Insurance (-0.2%): The Library received a check from the insurance company for a refund of an over-charge.
Vehicle Insurance (0.0%): Nothing has been paid from this line item yet.
Other Insurance (0.0%): Nothing has been paid from this line item yet.
Office Supplies (9.5%): Charges have been minimal.
Computer Supplies (21.8%): Charges have been minimal.
Copier Supplies (28.4%): Charges have been minimal.
Postage (10.7%): Charges have been minimal.
Library Supplies (49.6%): Charges have been minimal.
Natural Gas (40.8%): Charges have been minimal.
Electricity (52.0%): Charges have been minimal.
Water (81.4%): This is over-spent at this point because of the watering that was done over the summer months.
Telecommunications (53.4%): Charges have been minimal.
Professional Collection (51.1%): Charges have been minimal.
Periodicals (58.7%): Charges have been minimal.
Ebooks (0.0%): Nothing has been spent from this line item yet.
Employee Relations (33.5%): Charges have been minimal.
Miscellaneous Expenses (25.0%): Charges have been minimal.
ERI Reimbursement (100.0%): One transfer was made for the year, as opposed to transferring one-twelfth each month.
Fixed Asset Fund Transfer (100.0%): One transfer was made for the year, as opposed to transferring one-twelfth each month.
To Capital Fund (0.0%): This transfer has not been made yet.

The Donations line item breaks out as follows:

Summer Reading Program, Community Donations:	\$ 2,405.00
Fountain Receipts:	8.08
State Farm Good Neighbor Grant (Nancy Miller & Denyce Berg):	1,000.00
Unitarian Universalist Church, Donation for Spanish Books:	400.00
Memorial Donations:	125.00
Miscellaneous:	140.00
Total Donations:	\$ 4,078.08

The Other Revenue line item breaks out as follows:

Print Station:	\$ 6,284.30
Book Shoppe:	12,361.00
Sale of Reusable Bag:	204.50
Sale of Sling Backpacks:	355.00
Sale of Earbuds:	693.50
Sale of Flashdrives:	117.00
Sale of CD-R's:	43.50
Sale of Totebags:	0.00
Hot Beverage Station:	669.00
Test Proctoring:	1,090.00
Meeting Room Fees:	602.50
B Logistics Revenue:	2,667.57
Amazon.com (Online materials sales):	988.36
Bloomington-Normal-Opoly Game:	400.00
Miscellaneous:	927.77
Total Other Revenue:	\$24,946.75

During December, 12 batches containing 128 invoices were processed, totaling \$55,887.61 and 170 credit card charges were made totaling \$28,862.16.

Library Fund Balance Information, 12/31/13:

Operating:	\$ 2,563,913.16
Capital:	\$ 1,734,139.36
Fixed Assets:	\$ 825,358.97

APPROVAL OF BILLS

BILLS LIST

Approved by BPL Board of Trustees, January 21, 2014

Narendra Jaggi

Signature, BPL Trustee

Vendor	Line Item	Amount
Ameren IP	Electricity	5,902.50
Bloomington Normal Sunrise Rotary Club	Membership Dues	300.00
Bloomington Rotary Club	Membership Dues	300.00
CDW Government	Computer Supplies	325.92
Cengage Learning	Adult Books	2,234.49
Center Point Large Print	Adult Books	563.22
City Directories (Info Group)	Public Access Software	13,250.00
City of Bloomington	Dental Insurance	845.44
City of Bloomington	FICA	9,907.75
City of Bloomington	Fuel	491.22
City of Bloomington	Health Insurance-HMO	7,956.08
City of Bloomington	Health Insurance-PPO	16,595.92
City of Bloomington	IMRF	21,842.62
City of Bloomington	Life Insurance	229.54
City of Bloomington	Medicare	2,317.24
City of Bloomington	Payroll	169,690.74
City of Bloomington	Vision Insurance	192.74
City of Bloomington	Water	594.58
Cummins Midstate	Vehicle Maintenance	221.28
Custom Digital Imaging	Printing/Binding	3,217.66
Dell Marketing, L.P.	Computer Supplies	5,568.87
Demco	Library Supplies	640.09
Farnsworth Group	Other Purchased Services	6,291.00
Frontier	Telecommunications	1,614.68
Genealogical Publishing	Adult Books	10.45
Haney, Eric (A-1 Haney Plumbing)	Building Maintenance	130.00
Hill Radio, Inc.	Vehicle Maintenance	28.00
Illinois State University	Other Purchased Services	420.33
Illinois Wesleyan University	Other Purchased Services	852.16
Kavanagh, Scully, Sudow, White & Frederick, P.C.	Other Purchased Services	45.00
Kelly's Bakery & Café	Other Purchased Services	460.00
LimeLight Communications, Inc.	Advertising	200.00
Mid Illinois Mechanical Services, Inc.	Building Maintenance	374.45
Midwest Tape	A/V Materials	4,105.99
Midwest Tape	Other Purchased Services	23.23
Midwestern Family	Periodicals	14.99
Miller Janitorial Supply	Janitorial Supplies	831.80
Morningstar	Public Access Software	2,666.00
Nicor/Northern Illinois Gas	Natural Gas	3,097.88
Officemax	Computer Supplies	436.02
Officemax	Copier Supplies	768.87
Officemax	Employee Relations	41.54
Officemax	Library Supplies	61.80

Officemax
 Officemax
 Officemax
 Pantagraph Publishing
 Random House, Inc.
 Research Technology International
 Ricoh, USA, Inc.
 Specialty Vehicle Services, LLC
 Taylor, Pamela (Seastar Aquascapes)
 ThyssenKrupp Elevator Corp.
 Unique Management Services, Inc.
 U S Postal Service
 Vernon Library Supplies, Inc.
 Weber Electric, Inc.
 VISA - 1000Bulbs.com
 VISA - Abe Books
 VISA - Ace-Hi Glass
 VISA - American Flagpole & Flag Supplies
 VISA - Amazon Marketplace
 VISA - Amazon Marketplace
 VISA - Amazon.com
 VISA - Amazon.com
 VISA - Baker & Taylor Books
 VISA - Baker & Taylor Books
 VISA - Baker & Taylor Books
 VISA - Baker & Taylor Books
 VISA - Barnes & Noble
 VISA - Business Furniture, LLC
 VISA - Demco
 VISA - Denny's Doughnuts
 VISA - Dollar Tree
 VISA - Dollar Tree
 VISA - Dollar Tree
 VISA - Don Smith Paint Co.
 VISA - Eastland Suites
 VISA - Farm & Fleet
 VISA - Fazoli's
 VISA - Five Star Water
 VISA - FontSpring.com
 VISA - Hobby Lobby
 VISA - Hobby Lobby
 VISA - HR Direct
 VISA - Illinois Library Association
 VISA - Ingram
 VISA - Interstate All Battery Center
 VISA - JoAnn Fabrics
 VISA - Lowe's
 VISA - McLeod
 VISA - Medici
 VISA - Medici
 VISA - Meijer
 VISA - Mini Science
 VISA - Murphy at Wal-Mart
 VISA - National Enquirer
 VISA - NRS
 VISA - Officemax

Miscellaneous Expenses	1.89
Office Supplies	922.55
Other Purchased Services	32.91
Printing/Binding	1,200.00
A/V Materials	186.75
Library Supplies	307.94
Rentals	1,665.70
Other Purchased Services	4,200.00
Other Purchased Services	50.00
Building Maintenance	28.09
Other Purchased Services	832.35
Postage	200.00
Library Supplies	2,470.20
Building Maintenance	485.89
Building Mtnc Supplies	464.34
Adult Books	54.98
Building Mtnc Supplies	40.00
Office Supplies	99.95
A/V Materials	338.30
Adult Books	38.99
A/V Materials	602.48
Adult Books	105.25
A/V Materials	8,489.62
Adult Books	7,350.09
Juvenile Books	4,532.72
Professional Collection	1,835.00
Other Purchased Services	7.96
Other Purchased Services	187.50
Library Supplies	60.06
Other Purchased Services	15.00
Employee Relations	3.00
Office Supplies	18.00
Other Purchased Services	1.00
Building Mtnc Supplies	128.40
Other Purchased Services	61.60
Janitorial Supplies	87.02
Employee Relations	(47.87)
Miscellaneous Expenses	138.80
Office/Equipment Mtnc	35.00
Library Supplies	6.99
Other Purchased Services	29.90
Office Supplies	136.05
Membership Dues	100.00
Adult Books	1,244.58
Building Mtnc Supplies	48.80
Library Supplies	23.46
Building Mtnc Supplies	78.00
Telecommunications	123.23
Other Purchased Services	19.76
Travel	54.97
Employee Relations	45.58
Computer Supplies	127.48
Fuel	23.06
Periodicals	101.40
Other Purchased Services	88.80
Library Supplies	64.12

VISA - Office Depot
 VISA - Office Depot
 VISA - Pantagraph
 VISA - Papa John's Pizza
 VISA - Paypal*COSUGI
 VISA - Paypal*Look Magazine
 VISA - Radio Stations WDQZ, WRPW
 VISA - Sprint
 VISA - Toys R Us
 VISA - UPS
 VISA - USPS
 VISA - Valve Software
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart
 VISA - Wal-Mart.com

Total

Library Supplies	37.80
Office Supplies	40.00
Periodicals	259.93
Other Purchased Services	85.85
Membership Dues	100.00
Periodicals	35.80
Advertising	400.00
Telecommunications	309.34
Library Supplies	53.94
Postage	13.70
Postage	47.34
Public Access Software	229.95
Employee Relations	139.00
Janitorial Supplies	35.48
Library Supplies	101.07
Miscellaneous Expenses	68.95
Office/Equipment Mtnc	15.00
Office Supplies	166.32
Other Purchased Services	43.64
Janitorial Supplies	12.27

327,405.11

Bloomington Public Library
Monthly Statistics - December 2013

	Current Month	Cumulative	Last Year	Cumulative
CIRCULATION				
Adults	56,272	484,429	60,589	498,705
Teens	3,033	28,051	3,028	28,767
Children	41,810	430,748	47,673	440,530
OTR Adults	1,734	19,761	2,448	21,852
OTR Teens	99	1,077	124	1,192
OTR Children	2,427	31,129	3,239	33,541
e-Books - Freading	21	247	2,796	18,180
e-Books - Overdrive	3,474	26,079	N/A	N/A
Freegal downloads	678	5,963	813	6,002
Zinio Magazines	525	2,878	0	0
TOTALS				
Adults	58,006	504,190	63,037	520,557
Teens	3,132	29,128	3,152	29,959
Children	44,237	461,877	50,912	474,071
Digital Downloads	4,698	35,167	3,609	24,182
COMBINED TOTAL	110,073	1,030,362	120,710	1,048,769
ITEMS IN THE COLLECTION				
Main	285,729	285,729	276,012	276,012
OTR	12,763	12,763	15,418	15,418
TOTAL	298,492	298,492	291,430	291,430
HOLDS FILLED	7,310	63,149	6,834	54,254
CARDHOLDERS				
Added	270	4,078	391	5,033
TOTAL BY TYPE				
Adults	27,411	27,411	21,921	21,921
Teens	2,363	2,363	1,939	1,939
Children	7,034	7,034	5,963	5,963
Combined Total of Active Cards	36,808	36,808	29,823	29,823
REFERENCE QUESTIONS				
Adults	2,271	23,436	2,479	25,987
Teens	56	601	47	163
Children	758	8,429	755	8,173
OTR	48	533	62	691
Circulation	234	3,441	1,335	9,973
PROGRAMS				
Story Times	11	98	10	90
Adult	7	110	15	155
Teens	5	65	1	44
Juvenile	3	37	1	31
Outreach Adult	0	0	0	0
Outreach Teen	0	0	0	0
Outreach Juvenile	0	0	0	0
PROGRAM ATTENDANCE				
Story Times	212	1,997	190	2,291

Bloomington Public Library
Monthly Statistics - December 2013

	Current Month	Cumulative	Last Year	Cumulative
Adult Programs	59	1,489	176	1,966
Teen Programs	41	422	9	527
Juvenile Programs	31	2,861	75	3,198
Outreach Adult	0	0	0	0
Outreach Teen	0	0	0	0
Outreach Juvenile	0	0	0	0
SUMMER READING PARTICIPANTS				
CHILDREN				
Registered	0	4,458	0	4,696
Completed	0	2,635	0	2,832
TEENS				
Registered	0	822	0	783
Completed	0	387	0	431
ADULTS				
Registered	0	2,261	0	2,361
Completed	0	1,077	0	1,208
TOTAL				
Registered	0	7,541	0	7,840
Completed	0	4,099	0	4,471
COMPUTER USE				
Public computer uses	4,183	42,577	5,284	44,445
Website database/catalog hits	6,288	52,147	11,205	76,006
Online Resource (Database) uses	5,633	32,786	3,049	36,250
TOTAL	16,104	127,510	19,538	156,701
INTERLIBRARY LOAN				
Borrowing Requests Received	299	3,106	290	3,099
Outgoing Loans (Lending)	186	2,059	202	2,208
CONTACTS w/ COMMUNITY GROUPS				
Inside the library (events)	0	72	5	90
Outside the library (events)	10	61	6	69
Number of people	527	11,706	609	14,866
VOLUNTEER HOURS				
	103	1,448	100	906
MEETING ROOM USAGE				
Study Room	65	537	111	727
Digital Media Lab	31	367	0	0
CUSTOMER VISITS				
Customer Visits (MAIN)	26,802	281,999	31,412	310,528
Customer Visits (OTR)	595	9,764	724	9,374
COMBINED TOTAL VISITS	27,397	291,763	32,136	319,902
TRAINING HOURS				
	36	679	88	991

Golden Prairie Public Library District
Board of Trustees Meeting
November 20, 2013
7:00 am

Minutes

- I. Call to Order
Vice-President Gray called the meeting to order at 7:03 a.m.
- II. Roll Call
MEMBERS PRESENT: Carol Carey-Odekirk, Carolyn Dail (arrived at 7:09am) Tim Ervin, Lynn Gray, Stephen Peterson, Patti Salch

MEMBERS ABSENT: Adrienne Ives

OTHERS PRESENT: Georgia Bouda, Laura Golaszewski, Kathy Jeakins, Caprice Prochnow
- III. Introductions & Public Comment
There were no introductions or public comments.
- IV. President's Report
Vice-President Gray reported that the Board Mixer at the Bloomington Country Club was very nice.
- V. Approval of Minutes
A. October 16, 2013
PATTI SALCH MOVED, CAROLYN DAIL SECONDED, TO APPROVE THE MINUTES FROM THE OCTOBER 16, 2013 MEETING. THE MOTION CARRIED UNANIMOUSLY.
- VI. Staff Reports
A. Director's Report
Director Bouda stated that the bookmobile consultant, Michael Swendrowski, spent a whole day here at the Library going line by line on specifications needed for the new bookmobile with us. She went on to say that both she and Laura are very confident in his abilities.
Director Bouda stated that the BPL Board approved the RFP for the new bookmobile at last night's meeting, and these will be sent out to five different vendors. The estimated cost of a new bookmobile will be about \$250,000. It was discussed that \$110,000 is currently in reserve for capital purposes. There was general consensus

that Board members felt a donation would be made from this money for the new bookmobile.

Director Bouda shared that the Library has a card in the new Bloomington-Normal-Opoly game, and that the Library has agreed to sell 20 of the games for \$25.00 each. Director Bouda shared that the "Celebration of India" program had to be postponed due to the power outage on Sunday, but will be rescheduled in January. Director Bouda stated that the Halloween Parade and Story Time was well attended.

B. Outreach Report

Laura Golaszewski stated that generator was down due to a wiring problem for about a week. The stops were cancelled from Saturday through Wednesday. Laura stated that the new stop locations and times that started in November are going well.

C. Fiscal Report

Kathy Jeakins stated that another Property Tax Distribution was received last week. She entertained questions.

1. Approve October Financial Report

TIM ERVIN MOVED, STEPHEN PETERSON SECONDED, TO APPROVE THE OCTOBER FINANCIAL REPORT.

AYES: CAROL CAREY-ODEKIRK, CAROLYN DAIL, TIM ERVIN, LYNN GRAY, STEPHEN PETERSON, PATTI SALCH

NAYES: NONE

ABSENT: ADRIENNE IVES

THE MOTION CARRIED UNANIMOUSLY.

VII. Unfinished Business

A. Discussion of Marketing Ideas

Patti Salch stated that the idea of brochures at house showings will not work as the realtors are now only sharing information electronically.

Carol Carey-Odekirk suggested advertising on a Golden Prairie Public Library District Community Facebook page.

The idea of sending out postcards to Golden Prairie residents was discussed as to what it should say and if it is worthwhile.

As more discussion is needed, this will be included on next month's agenda.

VIII. New Business

A. Acceptance of FY13 Audit

Kathy Jeakins stated there was no Management Discussion and Analysis included in the audit because it is not required. Kathy went on to say that the reason that there was not a Budgetary Comparison of this year to last year is that GPPLD has never compared one year to another year, but rather current year budget to actual.

CAROL CAREY-ODEKIRK MOVED, CAROLYN DAIL SECONDED TO APPROVE THE FY13 AUDIT.

THE MOTION CARRIED UNANIMOUSLY.

B. Discussion of Compliance with Open Meetings Act

Director Bouda shared that the BPL Board had received an Open Meetings Act complaint, lodged by Diane Benjamin who lives in Ellsworth, which is in the Golden Prairie district. Director Bouda stated that in fact, Ms. Benjamin was misinformed as the BPL Agenda was posted both in the Library and on the BPL website and the press was notified in a timely manner. Additionally, members of the press and public were present, which provides evidence that indeed the Agenda had been posted. She went on to say that the complaint also claimed that the room in which the Board meets is not accessible to the public as the room is behind a door that only Library staff have access to. A security person must allow access for those attending the meetings. Director Bouda shared that she had called Atty. Phil Lenzini about the complaint, and with what Phil shared, she thinks the GPPLD Board is not in compliance with the Open Meetings Act. Phil stressed that a meeting must be convenient and accessible to be in compliance. The fact that the meeting is held behind a locked door makes it both inaccessible and inconvenient to the public. She shared with the Board members that breaking the Open Meeting Act is a felony and can have a fine up to \$2,500.00. Director Bouda suggested some options in order to make the meetings compliant with the Open Meetings Act, such as having it at the same place and time, but paying Security staff to let people in the front door, the same place but at a different time, or a different place but at the same time. After much discussion, the Board members are either considering a lunch meeting for a trial period or the hiring of a security officer for an hour to staff the main doors for any public that would like to attend. This item will be held over to the next meeting for further discussion when President Ives is in attendance.

C. Putt with the Prose Sponsorship

Director Bouda stated that the Putt with the Prose Sponsorship letter is included in the packet, and Golden Prairie is the first to be offered the option of sponsoring the 19th Hole, which is \$500.00. The event will be held on Sunday, February 9 from 1:00 – 4:00 pm.

CAROLYN DAIL MOVED, TIM ERVIN SECONDED TO APPROVE 2014 PUTT WITH THE PROSE SPONSORSHIP IN THE AMOUNT OF \$500.00.

AYES: CAROL CAREY-ODEKIRK, CAROLYN DAIL, TIM
ERVIN, LYNN GRAY, STEPHEN PETERSON, PATTI
SALCH

NAYES: NONE

ABSENT: ADRIENNE IVES

THE MOTION CARRIED UNANIMOUSLY.

IX. Adjournment

Vice-President Gray adjourned the meeting at 7:56 a.m.

Next Meeting Date

December 18, 2013

2014 Art Week Proposal

The Library would like to discontinue its practice of circulating artwork. In doing so, we propose that the collection be auctioned and raffled off to the public in the manner outlined below.

Ticketed Event

- The Library would stop circulating art on February 21.
- The 92 art prints would be put on display in the Community Room beginning the evening of Friday, May 16, 2014.
 - Auction prints will be separated from prints being raffled, but all the prints will be in the Community Room.
 - Low minimum bids will be set for each piece in the auction. Georgia predicts the prints will sell for \$25-\$100 each.
- From 6-9pm on May 16, the Library would host a ticketed wine, finger food & jazz reception on the library's upper level.
 - Tickets will cost \$20, and will only be sold in advance.
 - Board members will each be asked to sell a minimum of 10 tickets.
 - During the event, attendees:
 - Will be entertained with live jazz from Glenn Wilson and his 4-piece band (\$400) from 6:30-8:30pm.
 - Will enjoy finger foods, wine, and possibly beer catered by A. Renee.
 - Will each receive \$5 worth of raffle tickets (6 tickets).
 - Will be able to view the Library's McCurdy collection which will be displayed on the upper level.
 - Will be able to buy artwork outright using "Buy it Now" prices much like one sees during the Festival of Trees.
 - Will be allowed to bid on silent auction prints and purchase raffle tickets

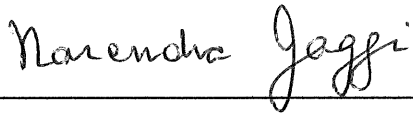
Week-long Silent Auction

- When the Library opens for business at 9am on May 17, the Silent Auction for the public will begin. It will run through 5pm on Saturday, May 24.
 - 10 prints will be raffled off; the remaining prints will be auctioned
 - Raffle tickets will be available for purchase at the Circulation Desk at a cost of \$1 each or 6 for \$5.
 - Prints being raffled will hang on the west wall in the Community Room and will be clearly labeled to indicate that they are part of a raffle and not part of the silent auction.
 - Separate bid sheets will be placed in front of each piece of art that is being auctioned.
 - Raffle prints will be numbered and raffle tickets will ask the buyer to indicate which numbered print the raffle ticket represents.

- **Notes:**

- The Library will need to apply for a raffle license.
- Georgia will ask Tracy at the City if we are able to purchase and pour our own wine. If that is allowed, we may purchase cheese trays and chocolates from Fresh Market and tackle the food and drink on our own.
- If we need a business with a liquor license to tackle the pouring, A Renee's estimate was \$12 per person @ 75 tickets sold with the per-person price going down as the number of attendees climbs.
- We will not confirm Glenn Wilson until we receive board approval. We are tentatively on his calendar.

Approved this 21st day of January 2014

A handwritten signature in cursive script that reads "Narendra Jaggi". The signature is written in black ink and is positioned above a horizontal line.

Narendra Jaggi, President

BLOOMINGTON PUBLIC LIBRARY

Policy regarding the Illinois Freedom of Information Act

Approved 8/19/08

Updated 1/21/14

1. A brief description of our public body is as follows:

A. Our purpose is to provide materials and services for the recreational, social, informational, and educational needs of the community.

B. An organizational chart is attached.

C. The total amount of our operating budget for FY14 is \$5,347,925.

Funding sources are property taxes, fees, personal property replacement taxes, state and federal grants, fines, charges, and donations.

D. The library is located at this address: 205 East Olive Street, Bloomington, IL 61701

E. We have the following number of persons employed:

1. Full-time: 42
2. Part-time: 35

F. The following organization exercises control over our policies and procedures: The Bloomington Public Library Board of Trustees, which meets monthly on the third Tuesday of each month, at 4:30 p.m., at 205 East Olive Street, Bloomington, IL.

The officers are:
Narendra Jaggi, President
Patsy Bowles, Vice-President
Jan Kibler, Secretary
Cathy Pratt, Treasurer

G. The following organization operates in an advisory capacity regarding our operation:

RAILS Library System
125 Tower Drive
Burr Ridge, IL 60527

Dee Brennan, Executive Director

- H. We are required to report and be answerable for our operations to:
Illinois State Library
300 S. 2nd Street
Springfield, Illinois 62701

Anne Craig, State Librarian

II. You may request the information and the records available to the public in the following manner:

- A. Use request form. (see attached)
- B. Your request should be directed to the following individual:
Tracey Covert, City Clerk
Freedom of Information Act (FOIA) officer for the City of Bloomington
- C. You must specify the records requested to be disclosed for inspection or to be copied.
- D. To reimburse us our actual costs for reproducing and certifying, (if requested) the records, you will be charged the following fees:
25 cents per page for employee copied records
- E. The office will respond to a written request within seven (7) working days or sooner if possible. An extension of an additional seven (7) working days may be necessary to properly respond.
- F. Records may be inspected or copied. If inspected, an employee must be present throughout the inspection.
- G. You may appeal the decision of the FOIA officer to the Board of Trustees.
- H. The times and place where the records will be available are as follows:
9 a.m. to 5 p.m., Monday – Friday, Bloomington Public Library Administrative Offices

III. Certain types of information maintained by us are exempt from inspection and copying. However, the following types or categories or records are maintained under our control:

- A. Ordinances and Resolutions
- B. Board Policies
- C. Administrative Procedures
- D. Monthly Financial Statements
- E. Annual Receipts and Disbursements Reports
- F. Budget and Appropriation Ordinances
- G. Levy Ordinances
- H. Annual Audits
- I. Operating Budgets
- J. Minutes of the Board of Trustees and Committees
- K. Job Descriptions
- L. Annual Reports to the State Comptroller

Records which are stored in electronic data processing will usually be printed out on paper for use by requesters, unless other arrangements are expressly made with the FOIA officer at the times the request is made.

Bloomington Public Library
Video Surveillance Policy
Approved 1/21/2014

The Library uses security cameras to help document events involving the safety and security of Library users and property. The security camera installation consists of dedicated cameras which may provide real-time surveillance through a video management system. The primary use of security cameras is to discourage inappropriate and illegal behavior and to enhance the opportunity to apprehend offenders.

Signage

The Library has a sign posted at the public entrance to the building giving notice of the use of security cameras for monitoring and recording activity in public areas of the Library property.

Camera Location

Cameras are installed and located in areas that are prone to theft or other activities that violate Library policy or criminal law. Cameras monitor all public entrances and exits to the Library.

Access to Digital Images

Video data is recorded and stored digitally on a network attached storage array. Recorded data is considered confidential and secure. Access to the recorded archival data is limited to the following authorized individuals: Library Director, Information Technology Manager, Support Services Manager and Security Staff and others at the discretion of the Library Director. Periodic checks are made by the Information Technology Manager and Support Services Manager to ensure proper operations of the system.

Access by Law Enforcement and Patron Privacy

Video surveillance records are not to be used directly or indirectly to identify the activities of individual Library patrons except as viewed in relation to a specific event or suspected criminal activity, suspected violation of Library policy, or incidents where there is reasonable basis to believe a claim may be made against the Library for civil liability. Authorized individuals may use a still shot or selected portions of recorded data to request law enforcement for assessing the security risk of a specific individual or for investigating a crime on Library property.

Video data will be made available to law enforcement officials or agencies upon presentation of a valid subpoena or pursuant to court order. The Library shall retain a copy of the subpoena or court order and documented evidence of the date and sufficiency of the Library's compliance therewith. Recorded data will be accorded the same level of confidentiality and protection provided to library users by Illinois state law and the Library's policies with respect thereto.

Retention of Digital Images

Recordings are kept for 31 days. The only recordings that exceed this limit are either image captures or partial recordings that involve ongoing investigations or to enforce suspensions from the Library.

Disclaimer of Liability

Any patron or staff shall be given a copy of this policy regarding use of the security cameras upon request. The Library disclaims any liability for use of the video data in accordance with the terms of this policy, given that the Library is a public facility and the security cameras shall be limited to those areas where patrons and/or staff have no reasonable expectations of privacy.

Bloomington Public Library

Library Circulation Policy

Approved by the Board of Trustees on January 21, 2014

The Board of Trustees of the Bloomington Public Library encourages the borrowing of its collections, both print and electronic. The Board of Trustees establishes policies to provide equitable access to all Library users.

Library Cards

Library cards are available to all residents of the City of Bloomington and the Golden Prairie Library District. Any resident, 17 years of age and older may receive an adult library card upon completion of an application and provision of a valid photo ID and current address. Acceptable forms of identification include valid Illinois driver's license or other government-issued photo ID with current address, a recent utility bill, signed lease agreement, personalized check, or recent mail with postmark.

The Bloomington Public Library reserves the right not to issue a library card to anyone who cannot provide identification and/or address verification. The library also reserves the right to restrict the borrowing privileges of any person who has overdue materials and/or accumulated fines or charges.

Minors

A parent or legal guardian's signature is required for anyone under the age of 17 to obtain a library card. The child and the parent must both be present. By signing the registration form, parents/guardians acknowledge responsibility for the items borrowed, fees incurred, and their child's selection of materials.

Emancipated minors who have proof of their court ordered emancipation may receive an adult card without parental consent.

Non-residents

Non-residents of Bloomington may purchase a library card with full borrowing privileges by completing the above steps and paying the annual non-resident fee set by the Library Board each year. Any resident of another library in the state of Illinois may register their card and use it at the Bloomington Public Library.

If during the course of the year, a customer moves from a Bloomington address to an out-of-area address, the customer will be required to pay the out-of-area fee if he/she wishes to retain Bloomington Public Library borrowing privileges, or register a local library card from a reciprocal library with the Bloomington Public Library.

Renewal of Library Cards

All library cards are valid for three years. At the end of that period, customers will be asked to verify their contact information by providing a valid photo id and an item verifying the current address.

Lost Cards

Lost or stolen library cards must be reported immediately. There is a minimal charge to replace a library card.

Borrowing Privileges

Borrowing privileges, in-house computer use and remote access to databases will be suspended when accrued fines and fees equal or exceed ten dollars (\$10.00). These privileges will be restored when the amount owed is below ten dollars (\$10.00).

Interlibrary loan service is available only to residents of the City of Bloomington and the Golden Prairie Library District. Charges for lost or damaged material provided through interlibrary loan is determined by the lending library and will include, but not be limited to, replacement cost, fines and processing fees.

Lost or Damaged Materials

Cardholders are responsible for loss or damage to materials they borrow, including cases and supplemental contents. Current replacement cost will be charged for materials that are lost or too badly damaged to remain in the library collection.

Incident Reports

Date	Time	Type
12/2	9:27 AM	InappropriateAttire
12/4	10:31 AM	StolenDamagedLibraryMaterial
12/7	11:18 AM	InappropriateBehavior
12/10	5:36 PM	SleepingIncident
12/11	2:44 PM	CustomerComplaint
12/11	3:45 PM	InappropriateBehavior
12/11	8:19 PM	BicycleIncident
12/12	9:43 AM	InappropriateBehavior
12/14	11:37 AM	SuspiciousCustomerActivity
12/15	2:12 PM	SleepingIncident
12/15	3:32 PM	
12/15	4:06 PM	SleepingIncident
12/15	4:26 PM	InappropriateBehavior
12/15	5:25 PM	TobaccoUse
12/16	11:29 AM	InappropriateBehavior
12/16	12:35 PM	Other
12/16	12:50 PM	SleepingIncident
12/16	8:05 PM	StolenDamagedLibraryMaterial
12/17	8:26 PM	PoliceAmbulanceCall
12/18	12:13 PM	AlcoholDrugs
12/18	2:17 PM	SleepingIncident
12/19	10:27 AM	StolenDamagedLibraryMaterial
12/20	12:58 PM	AlcoholDrugs
12/21	12:21 PM	SleepingIncident
12/23	11:03 AM	SleepingIncident
12/23	12:22 PM	CustomerRelatedIllnessAccident
12/23	12:31 PM	InappropriateAttire
12/23	1:04 PM	SleepingIncident
12/23	4:50 PM	
12/23	4:54 PM	SleepingIncident
12/23	4:58 PM	InappropriateBehavior
12/23	5:01 PM	SleepingIncident
12/23	5:06 PM	InappropriateBehavior
12/27	10:40 AM	InappropriateBehavior
12/27	1:24 PM	InappropriateAttire
12/27	1:57 PM	InappropriateBehavior
12/27	3:18 PM	SleepingIncident
12/28	9:43 AM	StolenDamagedLibraryMaterial
12/28	10:01 AM	SleepingIncident
12/28	10:26 AM	SleepingIncident
12/28	12:18 PM	InappropriateBehavior
12/28	12:44 PM	InappropriateBehavior
12/28	3:27 PM	InappropriateBehavior
12/28	4:10 PM	InappropriateBehavior
12/28	4:14 PM	InappropriateBehavior
12/29	2:08 PM	TobaccoUse
12/29	2:19 PM	InappropriateAttire
12/29	4:10 PM	InappropriateAttire
12/29	5:19 PM	InappropriateBehavior

Suspension Reports

Date	Time	violation
12/12	9:54 AM	InappropriateBehavior
12/16	4:12 PM	InappropriateBehavior
12/20	12:52 PM	AlcoholDrugs

Proposal for Staff Development Day May 28, 2014

I would like to recommend that the Board approve a Staff Development Day for May 28 featuring Warren Graham. The proposed topic is "Black Belt Librarians: Real World Customer Experience." This session will revitalize and empower your employees to see each interaction with patrons in an entirely new light.

Among the subjects discussed are:

- Who the patron really is.
- What the patron really wants.
- The critical elements of patron interaction.
- The three "A's" of success with patrons.
- The simple, yet forgotten principles of engagement.
- Is the patron the problem or is it really you?
- How to say "no" most effectively.
- What can you do for the patron?
- Are you up to the task?

Of course, you can also count on some role-playing that will quickly demonstrate the heart of the matter as well as frank, honest talk on what constitutes a pleasant patron/customer experience in your library.

The Library would be closed that day so that all staff will be able to attend the training. May 28 is the only day that Warren Graham has available before summer.

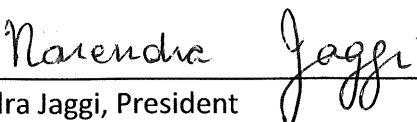
I would like to request the Library Board approve a request to the Foundation for up to \$3,000 for the day. This would be a good use of the income from the Stubblefield Trust.

Proposed costs for the day:

Consultant	\$1,600.00, plus travel and hotel costs
Lunch	\$500.00

The Bloomington Public Library Board of Trustees recommends that the Bloomington Public Library Foundation fund the 2014 Staff Development Day (including the Consultant's fee and expenses, and lunch) at a cost not to exceed \$3,000.00.

Approved on this 21st day of January 2014



Narendra Jaggi, President

January 14, 2014

Georgia Bouda – Director
Bloomington Public Library
205 East Olive Street
Bloomington, IL 61702

Re: Assessment of bookmobile RFP responses

Issue & Response

This Request For Proposal ("RFP") was issued by the Library on November 14, 2013 to multiple potential vendors in an effort to determine responsive and capable manufacturers for the new outreach vehicle. The RFP was issued with a deadline of January 10, 2014, allowing fifty seven (57) days for response.

Three (3) submitted proposals were shared with SVS for analysis on January 10, 2014; one (1) from Matthews Specialty Vehicles of Greensboro NC, one (1) from Summit Bodyworks of Commerce City CO, and one (1) from OBS, Inc. of Canton OH.

Proposal Assessment

These proposals were assessed for completeness and specification adherence. All proposals were found to be generally responsive, with the following exceptions and/or clarifications noted:

<i>Matthews Specialty Vehicles, Inc.</i>	<i>Summit Bodyworks</i>	<i>OBS, Inc.</i>
No "exceptions" sheet provided <u>Rear Engine Proposal</u> Basic Specs 1.6 – Interior width 90" (vs. 92") Basic Specs 1.7 – Interior height is 86" (vs. 84") Body Specs 38 – Door width 30" (vs. 33"), push-bar hardware not identified Body Specs 38.2 – Second door not available Body Specs 58 – Fiberglass screens not identified <u>Front Engine Proposal</u> Basic Specs 1.1 – Exterior length 33'-0" (vs. 33'-6" to 34'-3") Basic Specs 1.3 – Wheelbase 174" (vs. 180"-22") Basic Specs 1.6 – Interior width 90" (vs. 92") Basic Specs 1.7 – Interior height is 86" (vs. 84") Body Specs 38 – Door width 30" (vs. 33"), push-bar hardware not identified Body Specs 58 – Fiberglass screens not identified	Mandatory reference, compliance, insurance and gift ban pages not apparent No "exceptions" sheet provided Basic Specs 1.1 – O.A. length of 33'-3" (vs. 33'-6" to 34'-3") Basic Specs 1.3 – Wheelbase 174" (vs. 180"-220") Basic Specs 1.6 – Interior width 90" (vs 92") Basic Specs 1.7 – Interior height 86" (vs. 84") Body Specs 38 – Door width 30" (vs. 33") Body Specs 58.2.2 – No additional windows identified	Body Specs 58 – Fiberglass screens optional Body Specs 61 – Cradlepoint MBR1400 (vs. AirLink GX) cellular modem Body Specs 63 – FRP ceiling (vs. padded vinyl) Body Specs 64.2.1 – OBS "standard" desk (no ventilation) Body Specs 65.2.6.1 – OBS "standard" wiring (vs. specified) Body Specs 69 – Branch guards optional (not priced in proposal) Body Spec 76.2.1 – Rear seat will not swivel

Cost Summary - Rear Engine

<i>Vendor</i>	<i>Matthew Specialty Vehicles</i>	<i>Summit Bodyworks</i>	<i>OBS, Inc.</i>
Base Cost	\$248,491	Not Provided	\$241,689*
Rear Air Suspension	Inc. w/ front		Inc. w/ front
Front Air Suspension	\$8,551		\$2,760
Inverter System	\$8,840		\$8,400
AGS System	\$1,608		\$300
PTS3000 Transmission	\$8,512		Not Identified
Graphics	\$4,000		\$4,000
22" TV	\$645		\$306
LP Furnace System	\$7,065		\$7,000
LED Lights	\$1,087		\$2,600
Aluminum Shelving	\$5,496		\$2,000
Generator slide-out Tray	Not Required		\$1,100**
Cat's Eye monitor system	Not Required		\$1,600**
Total with Options	\$294,295	Not Provided	\$269,055
Payment Terms			20/30/45/5
Start Timeframe	120-150 days		135-180 days

* with Cummins ISB engine

** not included in total for comparative reasons

Analysis

Short some listed clarifications, all proposals were found to be generally responsive and demonstrated good attention to the requirements of this RFP. Two (2) of these vendors are seasoned manufacturers of bookmobiles and generally regarded as leaders of this industry. Summit Bodyworks is a well-recognized specialty vehicle builder, but relatively new to the bookmobile segment.

When we published our RFP, we did not realize that current generation rear-engine buses did not allow placement of the rear door behind the rear axle - a mission-critical feature for efficient loading/unloading in the library garage. An addendum was issued for an optional front-engine version of the same chassis and as anticipated, multiple proposals were received. Upon review, it was confirmed that neither rear engine proposal could meet the door placement requirement. These proposals were disregarded and focus was put on the front-engine versions.

Investigating the lowest price proposal from OBS, Inc. first, I noted opposition to build the vehicle to some of our specifications within their response. Although they complied with the majority of requirements, vague response statements such as "OBS Standard" required additional insight and in reality did not meet our specifications. Of particular note, we requested a wiring system that was accessible and easy to maintain, but it is commonly known in the industry that the "OBS Standard" wiring system permanently embeds conduit in the walls, rendering large segments of wire inaccessible without complete disassembly. Further objections to providing specified heat ventilation within the desks or an acoustically absorbent ceiling material were additionally noted.

Looking at the second lowest proposal from Matthews Specialty Vehicles, I noted some dimensional discrepancies and price differences. Upon deeper investigation, I learned that the overall length was listing incorrectly and that the actual unit length was much closer to our target. I further learned that when progress payment terms were suggested to even the field, a significant discount was offered.

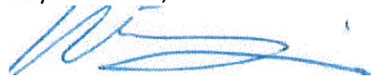
Conclusion

Matthews Specialty Vehicles a trusted industry vendor with a generally good industry reputation. They responded well to the RFP, have built near identical units for other libraries, and have agreed to construct your vehicle virtually 100% to your specification at a reasonable price point. With no apparent reason to disqualify this proposal, I believe that selection of the Matthews proposal for award would be a prudent and responsible choice by the Library.

That said, and assuming the total falls within the project budget, I formally recommend the award of this outreach vehicle contract to **Matthews Specialty Vehicles, Inc.** I believe this company and proposed vehicles will meet the needs of, and better serve the staff and patrons of Bloomington for many years to come.

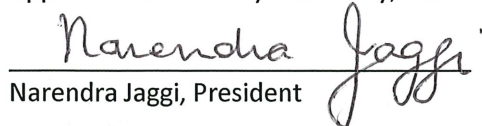
Thank you again for your continued trust during this process. I look forward to continuing work on this exciting project, and further to a very successful delivery later this year! As always, please feel free to contact me anytime with any questions or comments you may have.

At your service,



Michael Swendrowski
President

Approved this 21st day of January, 2014


Narendra Jaggi, President

BPL BOARD MEMBER TERMS

January 15, 2014

	TERM BEGINS (FIRST MEETING ATTENDED)	TERM EXPIRES	
CAROL KOOS	APPOINTED 10/21/97	04/2014	
PATSY BOWLES	APPOINTED 5/19/98	04/2014	
BILL WETZEL	APPOINTED 1972	04/2015	
PEGGY BURTON	APPOINTED 5/18/04	04/2015	
CATHY PRATT	APPOINTED 3/23/09	04/2014 ¹⁵	
JAN KIBLER	APPOINTED 3/05/12	04/2014	Finishing Jim Charlesworth term
NARENDRA JAGGI	APPOINTED 8/13/07	04/2016	
JONI PAINTER	APPOINTED 4/30/13	04/2016	
EMILY KELAHAH	APPOINTED 4/30/13	04/2016	

Bloomington Public Library

Books are just the beginning.

Find

Use

See & Do

Participate

Bloomington Public Library

205 East Olive Street
Bloomington, IL 61701-5218
(309) 828-6091
www.BloomingtonLibrary.org

INVITATION TO BID

PRIMARY SPACE HEATING HOT WATER BOILER And CONTROL SYSTEM SOFTWARE PROJECT

Mailing Address:

Bloomington Public Library
205 East Olive Street
Bloomington, IL 61702-2208

Contact Person:

Owner Contact:
Caprice Prochnow
Support Services Manager
Bloomington Public Library
309-557-8902

Project Engineer Contact:
Tim Gilles, LEED AP
Farnsworth Group, Inc.
200 West College Ave., Suite 301 | Normal, IL 61761
p 309.663.8436, ext. 223 | f 309.663.8862

Bids Due:

February 12, 2014
2:00 PM CST
Bloomington Public Library

TABLE OF CONTENTS

Cover Page	1
Table of Contents	2-3
Invitation to Bid/Legal Notice	4
Terms & Conditions	5-11
Background	5
Bid Identification	5
Definition	5
Questions	5
Bid Package	5
Rejection of Bids	5
Non-Discrimination	6
Ex Parte Communication	6
Full Pricing and Contingencies	6
Payment Terms	6
Bid Evaluation	7
Quality	7
Recourse for Unsatisfactory Materials	7
Investigation	7
Proof of License, Permits, Etc.	7
Bid Form	7-8
Bid Submission	8
Brand Name, Model, Scope of Work	8
Bid Opening	8
Performance Bond	8
Bid Bond	8
Cancellation	8
Withdrawal of Bid	9
Rejection of Bids, Waivers of Irregularity	9
Protests	9
Prevailing Wage	9
Certified Payroll Requirements	9
Increased Penalties for Prevailing Wage Violations	10
Substance Abuse Prevention	10
OSHA Requirements	10
Security	10-11
References - Mandatory	12
Contractor Compliance - Mandatory	13
Insurance - Mandatory	13
Gift Ban Act - Mandatory	14
Equal Opportunity Guidelines	14
EEO Statement	15
EEO Letter	16
Contract Compliance Report Forms - Mandatory	17-21
Resolution No. 2013-16	22-23

January 2014 Prevailing Wage Rates	24-32
Specifications	33-133
Variance Form	134
Bid Form - Mandatory	135
Bid Checklist	136
Tentative Bid Schedule	136

**LEGAL NOTICE OF
INVITATION TO BID
BLOOMINGTON PUBLIC LIBRARY**

Sealed bids will be received at the Bloomington Public Library, 205 East Olive Street, Bloomington, Illinois 61702, until Wednesday, February 12, 2014 at 2:00 PM, Central Time, at which time they will be publicly opened and read for the following:

**PRIMARY SPACE HEATING HOT WATER BOILER
And
CONTROL SYSTEM SOFTWARE PROJECT**

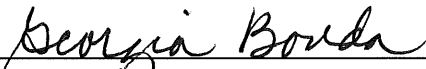
A pre-bid meeting will be on Thursday, February 6, 2014 at 10:00 AM

Documents may be obtained at the Bloomington Public Library, 205 E. Olive, Bloomington, IL 61701, Monday through Friday between the hours of 9:30 AM and 4:30 PM Central time. Information is also available on the Bloomington Public Library website at www.bloomingtonlibrary.org and click on the following links on the Quick Links section: Boiler/Control System Project Invitation to Bid. You may **NOT** respond with an electronic bid submission. All bids must be submitted in a sealed envelope.

The Bloomington Public Library reserves the right to reject any and all bids and to waive technicalities.

The Bloomington Public Library requires all contractors and vendors doing business with the Library not to discriminate on the basis of race, age, color, religion, gender, ancestry, national origin, marital status, mental or physical disability unrelated to ability, familial status or sexual orientation.

Contractors shall not pay less than the prevailing rates of wages to all laborers, workmen, and mechanics performing work under this contract, and shall comply with the requirements of the Illinois Prevailing Wage Act (820 ILCS 130/1-12).



Georgia Bouda, Director

Published **January 23, 2014** Bloomington, Illinois

TERMS AND CONDITIONS FOR BIDDERS

BACKGROUND:

Bloomington Public Library was built in 1976. The Library is 51,000 square feet. The original building was 44,000 square feet with a 7,000 square foot addition completed in 2006. This project is to replace the original boiler and to upgrade the control software.

BID IDENTIFICATION:

Bidders are required to legibly write the bid name and due date in the lower left corner. Do **not** submit bids by fax or electronically. Bids submitted by fax or electronically cannot be accepted or considered for award. Sealed bids are required.

DEFINITION:

"Library" shall mean the Bloomington Public Library, Bloomington, Illinois.

QUESTIONS:

Questions regarding bid/proposal procedures shall be directed to Caprice Prochnow, Support Services Manager, during regular working hours, telephone 309-557-8902.

Questions regarding the technical nature or performance expectations of the equipment, material, or service in the bid shall be submitted in writing to:

Tim Gillis
Farnsworth Group
Phone: 309.663.8436, ext. 223
Email: tgilles@F-W.com

Questions will be answered in the form of written addenda and provided to all Bidders, as per State of Illinois statutes.

BID PACKAGE:

If you have obtained this bid from a source other than directly from the Bloomington Public Library, you are not on record as a plan holder. The Library takes no responsibility to provide addenda to parties not listed by the Library as plan holders. It is the bidder's responsibility to check with the Support Services Manager's office prior to submitting your bid to ensure that you have a complete, up-to-date package. The original copy maintained and on file at the Library shall be considered the official copy. **Addenda copies shall be attached to your bid as proof of receipt.**

REJECTION OF BIDS:

The Bloomington Public Library reserves the right to reject any and all bids and to waive technicalities and to accept that bid which is to be considered to be in the best interest of the Library. Any such decision shall be considered final.

NON-DISCRIMINATION:

The Bloomington Public Library requires all contractors and vendors doing business with the Library not to discriminate against anyone on the basis of race, age, color, religion, gender, ancestry, national origin, marital status, mental or physical disability unrelated to ability, familial status or sexual orientation.

Contractors and Vendors shall comply with the Illinois Human Rights Act, 775 ILCS 5/101 et seq., as amended and any rules and regulations promulgated in accordance therewith, including, but not limited to the Equal Employment Opportunity Clause, Illinois Administrative Code, Title 44, Part 750 (Appendix A), 775 ILCS 5/1-102 and constituting of a written EEO policy and a workforce profile that demonstrates its EEO practices. Furthermore, the Contractor or Vendor shall comply with the Public Works Employment Discrimination Act, 775 ILCS 10/0.01 et seq., as amended. The contractor or vendor must have a written sexual harassment policy, which meets Illinois Compiled State Statutes, 775 ILCS, 15/3.

EX PARTE COMMUNICATION:

Please note that to insure the proper and fair evaluation of a proposal or bid, the Bloomington Public Library prohibits exported communication (i.e., unsolicited) initiated by the Bidder to a Board of Trustee or Employee evaluating or considering the proposal/bid prior to the time a selection has been made. Communication includes but is not limited to fax, phone calls, email and personal visit. Communication between Bidder and the Library will be directed in writing to the Director or designated contact person only. The Director will obtain the information or clarification needed. Exported communication may be grounds for disqualifying the offending Bidder from consideration or award of the proposal and repeat offenders may be disqualified from future projects.

FULL PRICING AND CONTINGENCIES:

Please quote your best net price including delivery and discounts to meet the approval of the Library. Prices shall be stated in units of quantity specified. No additional charges shall be passed to the Library, including any applicable taxes, delivery or surcharges. Prices quoted shall be the final cost to the Library. The Library shall hold the successful bidder to the bid pricing. Additional charges for contingencies discovered by the bidder at any time after the date of the opening of this bid will not be considered for payment by the Library.

All prices and notations shall be in ink or typewritten. Mistakes may be crossed out and corrections made in ink and must be initialed and dated in ink by the person signing the bid. In case of error in the extension of prices, the unit price shall govern.

PAYMENT TERMS:

If payment terms are not indicated, terms of NET 30 days shall be applied by the Library. Payment terms to apply after receipt of invoice or final acceptance of the products/services, whichever is later. Payment terms offering less than 20 days for payment will not be considered. Please note: the Bloomington Public Library offers Electronic Funds Transfers (EFTs) for vendors receiving multiple payments.

BID EVALUATION:

Bids will be evaluated and awarded to the lowest responsible, responsive bidder. The quality of the products/services, conformity with the specifications, suitability to the requirements, delivery terms including length of time for delivery, qualifications and references will be taken into consideration in making an award. The Library will be the sole judge of acceptability of any products offered.

QUALITY:

The scope of work or specification is intended to procure a quality product or service. Quality must be proven to the satisfaction of the Library to meet or exceed requirements as set forth in the scope of work. Items shall be manufactured according to the highest traditions of the industry and shall meet all commercial standards of quality. The Library will be the sole judge of acceptable products. Unacceptable products will be rejected and suitable price adjustments be made.

It is the bidder's task to be familiar with the referenced items and to offer only products of equal or greater quality.

Samples, when requested, must be furnished free of expense, and upon request, if not destroyed, will be returned at the Bidder's risk and expense.

RECOURSE FOR UNSATISFACTORY MATERIALS:

Payment shall be contingent upon the Library's inspection of and satisfaction with completed work. Any defective work or materials, non-conformance to bid specifications, damaged materials, or unsatisfactory installation shall be corrected to the Library's satisfaction by the successful bidder at no additional charge.

INVESTIGATION:

Bidders must acquaint themselves with the policies of the Library, and may do so by contacting the Support Services Manager. All questions as to the meaning of the scope of work must be resolved prior to the bid submission deadline. It is the Bidder's responsibility to check with the Support Services Manager prior to submitting their bid to ensure that they have received all Addenda that may be issued.

PROOF OF LICENSE, PERMIT, ETC.:

Bidders must provide proof of conformance with any applicable Federal/State/Local permits, licenses, certifications, etc., or the ability to obtain any applicable Federal/State/Local permits, licenses, certifications, etc., within a reasonable time after the bid award and prior to the performance of the work. It is the bidder's responsibility to inquire about requirements of performing the job with the requesting department contact person.

BID FORM:

This entire package shall be returned complete and intact with all information requested and all questions answered. The amount of the bid shall be stated on the form(s) provided. Variations from the Specification shall be noted on a separate sheet of paper. If more space is required to furnish a description of the service offered or delivery/start terms, the vendor may attach a

letter hereto, which will be made a part of the bid.

BID SUBMISSION:

PLEASE SUBMIT (1) ORIGINAL, (3) COPIES AND A DIGITAL FILE ON A FLASHDRIVE OF THE ENTIRE BID PACKET.

BRAND NAME, MODEL, SCOPE OF WORK:

All Bidders shall include with their bid brand names, models, catalog numbers, and complete information about the items they are offering. **Manufacturer's Safety Data Sheets, MSDS, are required for all chemical Bids.**

BID OPENING:

Telephone/Fax/Verbal Offers Will Not Be Accepted.

Bids shall be publicly opened and read at the time and date set. It is the responsibility of the vendor to see that the bid has been received by the Library by the specified date and time. The date of the postmark will not be considered. Bids received after the time and date set will be returned unopened to the Vendor. This includes Bids not received as a result of mail delays. In the event that the Library is closed for business at the time scheduled for the bid opening, sealed bids will be accepted on the next business day of the Library, up to the originally scheduled time.

PERFORMANCE BOND:

The successful bidder will be required to provide a Performance and Payment Bond in the amount equal to 100% of the contract price, within ten (10) business days after the bid award. The Performance and Payment Bond shall be duly authorized by an insurance company licensed to do business in the State of Illinois.

BID BOND:

Each bidder shall submit with her or his bid a Bid Bond in the amount equal to 5% of the base bid price. The Bid Bond shall be duly authorized by an insurance or surety company licensed to do business in the State of Illinois. As an alternative to the Bid Bond, bidder may submit a certified check or cashier's check in the amount equal to 5% of the base bid price, made out to the Owner. If the Owner is required to exercise the Bid Bond or the certified or cashier's check, and the value of same is less than the difference between the selected bidder's price and the next bona fide bid, that originally selected bidder shall be obligated to provide the Owner with that difference (in addition to the value of the Bid Bond or check).

CANCELLATION:

Failure to comply with the terms and conditions as herein stated shall be cause for cancellation of the contract. The Library will give a written notice of unsatisfactory performance and the contractor or vendor will be allowed thirty (30) days to take corrective action and accomplish satisfactory control. If at the end of the thirty (30) days, the Library deems that the contractor or vendor's performance is still unsatisfactory, the contract shall be canceled. The exercise of its right of cancellation shall not limit the Library's right to seek any other remedies allowed by law.

WITHDRAWAL OF BID:

A vendor may withdraw a bid prior to the deadline for bid submittal by submitting a request for its withdrawal. Bids received after the time for opening bids or received at any place other than the place specified will not be considered. Except as otherwise provided by regulation, all decisions to permit the correction or withdrawal of bids, or to cancel awards or contracts based on bid mistakes, will be submitted in writing and will be supported by a written determination made by the Director. The request shall then be forwarded to the City's legal staff for final recommendation.

REJECTION OF BIDS, WAIVERS OF IRREGULARITY:

The Library reserves the right to reject any or all bids, to waive irregularities, and to accept that bid which is considered to be in the best interest of the Library. Any such decision shall be final.

PROTESTS:

Any actual or prospective vendor who is aggrieved in connection with this bid or award may protest to the Library Board of Trustees during the public Board meeting only. The protest will be submitted in writing to the Director immediately after such aggrieved person knows or should have known of the facts giving rise and the Board President will place same on the Board agenda if not resolved prior to that time.

PREVAILING WAGE:

The State of Illinois requires under public works contracts that the general prevailing rate of wages in this locality be paid for each craft or type of worker hereunder. This requirement is in accordance with the Prevailing Wage Act (820 ILCS 130) as amended. This shall include payment of the general prevailing rate for legal holiday and overtime work. It shall be mandatory upon the subcontractor under the Contractor. A copy of the most current monthly prevailing wage rates by County is posted on the Illinois Department of Labor website at www.state.il.us/agency/idol. Note that the Prevailing Wage rates change monthly and it is the contractor's responsibility to ensure the correct wage is paid.

CERTIFIED PAYROLL REQUIREMENTS (Public Act 94-0515)

Effective August 10, 2005, contractors and subcontractors on public works projects must submit certified payroll records on a monthly basis to the public body in charge of the construction project along with a statement affirming that such records are true and accurate, that the wages paid to each worker are not less than the required prevailing rate for that County and that the contractor is aware that filing records he or she knows to be false is a Class B misdemeanor.

The certified payroll records must include for every worker employed on the public works project, the name, address, telephone number, social security number, job classification, hourly wages paid in each period, number of hours worked each day, and starting and ending time of each work day. These certified payroll records are considered public records and public bodies must make these records available to the public under the Freedom of Information Act, with the exception of the employee's address, telephone number and social security number. Any contractor who fails to submit a certified payroll or knowingly files a false certified payroll is guilty of a Class B misdemeanor.

INCREASED PENALTIES FOR PREVAILING WAGE VIOLATIONS (Public Act 94-0488)

Effective January 1, 2006, penalties for violations of the Prevailing Wage Act will increase from 20% to 50% of the unpaid amounts for second or subsequent violations. An additional penalty of 5% of the underpayment penalty must be paid to workers for each month the wages remain unpaid.

For violations that occur after January 1, 2006, the debarment period-during which contractors are ineligible for public works contracts, increases from 2 years to 4 years if two notices of violation are issued/serious violations occur within a 5 year period. In addition, a new monetary penalty of \$5,000 may be assessed against contractors who retaliate against employees who report violations or file complaints under the Prevailing Wage Act.

SUBSTANCE ABUSE PREVENTION ON PUBLIC WORKS PROJECTS ACT:

The successful bidder must be in compliance with the State of Illinois HB-1855 (Public Act 095-0635), which amends the Prevailing Wage Act. Before an employer commences work on a public works project, the employer shall have in place a written program, which meets or exceeds the program requirements in this Act, to be filed with the public body engaged in the construction of the public works and made available to the general public, for the prevention of substance abuse among its employees. The testing must be performed in a laboratory that is certified for Federal Workplace Drug Testing Programs by the Substance Abuse and Mental Health Service Administration of the U.S. Department of Health and Human Services.

OSHA REQUIREMENTS:

The Occupational Safety and Health Act of 1970 (OSHA), "guarantees workers the right to a safe and healthful workplace." Under Section 5(a) (1) of the OSHA Act, the employer must "furnish to each of his employees' employment and place of employment which are free from recognized hazards that are causing or likely to cause death or serious physical harm to its employees."

There are times when the Library must hire entities and individuals (contractors) to perform services. To this end, contractors hired by the Library must perform their duties in a manner that is compliant with all State and Federal health and safety laws and industry guidelines. It is the responsibility of the contractor to ensure that their personnel and subcontractors comply with all State and Federal health and safety laws, regulations and industry guidelines, including, but not limited to those set forth by: OSHA and related regulations, the Safety Inspection and Education Act, the Health and Safety Act, the National Institute of Occupational Safety and Health, the National Fire Protection Association, the Centers for Disease Control, American Industrial Hygiene Association, the American Council of Governmental Industrial Hygienists, the Environmental Protection Agency and the Department of Transportation.

SECURITY:

The contractor represents and warrants to the Library that neither it nor any of its principals, shareholders, members, partners or affiliates, as applicable, is a person or an entity named as a Specially Designated National and Blocked Person (as defined in Presidential Executive Order 13224) and that it is not acting, directly or indirectly, for or on behalf of a Specially Designated

or Blocked Person. The contractor further represents and warrants to the Library that the contractor and its principals, shareholders, members, partners, or affiliates as applicable, are not directly or indirectly, engaged in, and are not facilitating, the transactions contemplated by this Agreement on behalf of any person or entity named as Specially Designated National and Blocked Person. The contractor hereby agrees to defend, indemnify and hold harmless the Bloomington Public Library, and all Library appointed officials, officers, employees, agents, representatives, engineers and attorneys, from and against any and all claims, damages, losses, risks, liabilities, and expenses (including reasonable attorneys' fees and costs) arising from or related to any breach of the foregoing representation and warranties.

THIS PAGE IS MANDATORY

REFERENCES:

Three (3) references are **required** with your proposal. The references shall be from three different sources where you have provided the minimum specifications as required in this proposal. Bidder may use the Bloomington Public Library or the City of Bloomington as one reference if the Bidder has provided this equipment or service to the Library or City since January 1, 2010

(1.) Company Name: _____

Company address: _____

City: _____ State: _____ Zip: _____

Company Contact Name or Department: _____

Company Contact Telephone: _____ Fax: _____

Company Contact e-mail address: _____

(2.) Company Name: _____

Company address: _____

City: _____ State: _____ Zip: _____

Company Contact Name or Department: _____

Company Contact Telephone: _____ Fax: _____

Company Contact e-mail address: _____

(3.) Company Name: _____

Company address: _____

City: _____ State: _____ Zip: _____

Company Contact Name or Department: _____

Company Contact Telephone: _____ Fax: _____

Company Contact e-mail address: _____

THIS PAGE IS MANDATORY

*****NOTE: FAILURE TO SIGN THE FOLLOWING CONTRACTOR COMPLIANCE AND INSURANCE SECTIONS WILL DISQUALIFY YOUR BID.**

Contractor Compliance with Public Act 85-1295:

The vendor certifies by signing this statement that this bid is made without prior understanding, agreement or accord with any other person submitting a bid for the same product or service and that this bid is in all respects bona fide, fair and not the result of any act of fraud or collusion with another person engaged in the same line of business or commerce. Furthermore, the firm certifies that it is not barred from bidding on this contract as a result of a conviction for the violation of State laws prohibiting bid-rigging or bid-rotating. Any false statement hereunder constitutes a felony and can result in a fine and imprisonment as well as civil damages. The vendor also understands that failure to sign this statement will make the bid non-responsive and unqualified for award.

Print Name & Date

Authorized Signature

Company Name

Insurance:

Vendors providing a service or installing equipment on or about Library property shall provide to the Support Services Manager evidence of Comprehensive, Liability, and Workman's Compensation insurance prior to commencement of work on Library property. The vendor guarantees to save the Library, its agents or employees, harmless from liability of any nature or kind, for use of any copyright, composition, secret process, patented or unpatented invention, articles or appliances furnished or used in the performance of the contract, or which the vendor is not the patentee, assignee, or licensee.

Furthermore, the vendor hereby agrees to save and hold harmless and indemnify the Library from and against all injury, death, damage, loss, claims and liability caused by or arising out of the performance of this agreement by the Vendor, its employees, agents or sub-vendors. This agreement extends to all claims, of any nature, whether made by the Vendor's employees or third parties.

Print Name & Date

Authorized Signature

Company Name

THIS PAGE IS MANDATORY

GIFT BAN ACT:

I certify that _____ (print company name), its officers, employees and agents, have not made any gifts to officers or employees of the City of Bloomington in violation of Illinois Compiled Statutes, 5 ILCS 430/Article 10, State Officers and Employees Ethics Act (commonly known as the "Gift Ban Act"). The Act is available online at: <http://www.ilga.gov/legislation/ilcs/ilcs4.asp?DocName=000504300HArt%2E+10&ActID=2529&ChapterID=2&SeqStart=1700000&SeqEnd=2200000> under.

I further certify that as a bidder, I have not violated the Bloomington City Code Chapter 2, Administration; Article I, Section 8: Officers and Employees Generally: Section 8a Prohibition on the Solicitation and Acceptance of Gifts; and 8b State Officials and Employees Ethics Act. This section of the Bloomington City Code is available online at <http://www.cityblm.org/code.asp?show=section&id=3450>.

Print Name & Date

Authorized Signature

Equal Opportunity Guidelines:

The City requires all contractors and vendors doing business with the City not to discriminate against anyone on the basis of race, age, color, religion, gender, sexual orientation, ancestry, national origin, and non-job-related disabilities. This program was approved by the City Council on May 27, 1974. In accordance with this program the City shall require that the vendor or contractor be familiar and comply in every respect with the provisions of this program. Information regarding the program may be obtained by contacting the Human Relations Department 309/434-2218.

EQUAL EMPLOYMENT OPPORTUNITY

In the event of the contractor's non-compliance with the provisions of this Equal Opportunity Clause, the Illinois Human Rights Act or the Rules and Regulations of the Illinois Department of Human Rights ("Department"), or the City of Bloomington's Contract Compliance Program, the contractor may be declared ineligible for future contracts or subcontracts with the State of Illinois or any of its political subdivisions or municipal corporations, including the City of Bloomington, and the contract may be canceled or voided in whole or in part, and such other sanctions or penalties may be imposed or remedies invoked as provided by statute, ordinance or regulation. During the performance of this contract, the contractor agrees as follows:

- (1) That it will not discriminate against any employee or applicant for employment because of race, color, religion, gender, sexual orientation, marital status, national origin or ancestry, age, physical or mental disability unrelated to ability, or an unfavorable discharge from military service; and further that it will examine all job classifications to determine if minority persons or women are underutilized and will take appropriate affirmative action to rectify any such under-utilization.
- (2) That, if it hires additional employees in order to perform this contract any portion thereof, it will determine the availability (in accordance with the Department's Rules and Regulations or those of the Human Relations Commission) of minorities and women in the area(s) from which it may reasonably recruit and it will hire for each job classification for which employees are hired in such a way that minorities and women are not underutilized.
- (3) That, in all solicitations or advertisements for employees placed by it or on its behalf, it will state that all applicants will be afforded equal opportunity without discrimination because of race, color, religion, gender, sexual orientation, marital status, national origin or ancestry, age, physical or mental disability unrelated to ability, familial status, or an unfavorable discharge from military service.
- (4) That it will send to each labor organization or representative of workers with which it has or is bound by a collective bargaining or other agreement or understanding, a notice advising such labor organization or representative of the contractor's obligations under the Illinois Human Rights Act and the Department's Rules and Regulations. If any such labor organization or representative fails or refuses to cooperate with the contractor in its efforts to comply with such Act and Rules and Regulations, the contractor will promptly so notify the Department and Human Relations Commission and the contracting agency and will recruit employees from other sources when necessary to fulfill its obligations thereunder.
- (5) That it will submit reports as required by the Department's Rules and Regulations and Human Relations Commission, furnish all relevant information as may from time to time be requested by the Department or the contracting agency, and in all respects comply with the Illinois Human Rights Act and the Department's Rules and Regulations and those of the City of Bloomington's Contract Compliance Program.
- (6) That it will permit access to all relevant books, records, accounts and work sites by personnel of the contracting agency and the Department for purposes of investigation to ascertain compliance with the Illinois Human Rights Act and the Department's Rules and Regulations and those of the City of Bloomington's Contract Compliance Program.
- (7) That it will include verbatim or by reference the provisions of this clause in every subcontract it awards under which any portion of the contract obligations are undertaken or assumed, so that such provisions will be binding upon such subcontractor. In the same manner as with other provisions of this contract, the contractor will be liable for compliance with applicable provisions of this clause by such subcontractors; and further it will promptly notify the contracting agency, the Department and the Human Relations Commission in the event any subcontractor fails or refuses to comply therewith. In addition, the contractor will not utilize any subcontractor declared by the Illinois Human Rights Commission or Human Relation Commission to be ineligible for contracts or subcontracts with the State of Illinois or any of its political subdivisions or municipal corporations including the City of Bloomington.



Community Relations
109 E. Olive St.
Bloomington, IL 61701-3157
(309) 434-2218 (TTY) 829-5115

To Whom It May Concern:

The City of Bloomington's Equal Opportunity in Purchasing Ordinance and the Bloomington Human Relations Ordinance requires that any entity doing business with the City in the excess of \$10,000 during one year, must submit an Affirmative Action Report Form and an Affirmative Action Plan.

It is my understanding that your company will be or are presently a contractor/vendor for the City of Bloomington. In order for this office to approve your company to continue to conduct business with the City of Bloomington, all of the enclosed forms must be submitted to the Community Relations Division within 14 days after receipt of the requested information.

Please complete the enclosed information in its entirety and return it to the Community Relations Office. If your company has an approved Affirmative Action Plan, you may submit it instead of completing the enclosed forms. You must also include a breakdown of your present workforce by race and gender.

If the information requested is not submitted, your company may not be approved to do business with the City of Bloomington and could subsequently not be placed on the "Approved Contractor/Vendor List."

If you should have any questions regarding either of the forms, please feel free to contact me at (309) 434-2468

Sincerely,

Ernestine Jackson
Equal Opportunity Associate

City of Bloomington
Community Relations Division
109 E. Olive Street
Bloomington, Illinois 61701

(309) 434-2218

(309) 434-2831 (fax)

CONTRACT COMPLIANCE REPORT FORM

Failure to properly complete this form prior to the execution of a contract with the City, or within 7 days after a request for submission of this report, will result in it being returned unprocessed thereby resulting in a delay or denial of eligibility to bid or do business with the City of Bloomington.

Section I. Identification

1. Company Name and Address:

Name: _____

D/b/a: _____

Address: _____

City/State/Zip: _____

Telephone Number(s) include area code: _____

Check one of the following:

Corporation Partnership Individual Proprietorship Limited Liability Corp.

2. Name and Address of the Company's Principal Office (answer only if not the same as above)

Name: _____

Address: _____

City/State/Zip: _____

3. Major activity of your company (product or service);

THIS PAGE IS MANDATORY

THIS PAGE IS MANDATORY

Section II. Policies and Practices

Description of EEO Policies and Practices

Is it the Company's policy to recruit, hire, train, upgrade, promote and discipline persons without regard to race, sex, color, religion, national origin, age, mental and/or physical disability, and sexual orientation?

YES _____ NO _____

Has someone been assigned to develop procedures, which will assure that the EEO policy is implemented and enforced by managerial, administrative, and supervisory personnel? If so, please indicate the name and title of the official charged with this responsibility.

Name: _____

Title: _____

Telephone: _____

Has the Company developed a written Affirmative Action Plan? **Note: a copy of the Affirmative Action Plan must be submitted with this form in order to be considered eligible to do business with the City of Bloomington.** If you would need technical assistance in developing your plan, please contact the Community Relations Office at (309) 434-2218.

YES _____ NO _____

Has the Company developed a written policy statement prohibiting Sexual Harassment? Please attach a copy of the policy statement.

YES _____ NO _____

E. Have all recruitment sources been notified that the Company will consider all qualified applicants without regard to race, color, age, national origin, age, religion, sexual orientation mental/and or physical disability?

YES _____ NO _____

F. If advertising is used, does it specify that all qualified applicants will be considered for Employment without regard to race, color, age, sex, national origin, religion, mental and/or physical disability, or sexual orientation?

YES _____ NO _____

G. Has the contractor notified all of its sub-contractors of their obligations to comply with the Equal Opportunity requirements either in writing, by inclusion in subcontracts or purchase orders?

YES _____ NO _____

THIS PAGE IS MANDATORY

H. In the Company a state certified minority/women owned business? If yes, please attach a copy of the state certification.

YES____ NO____

I. Does the Company have collective bargaining agreements with labor organizations?

YES____ NO____

J. Have the labor organizations been notified of the Company's responsibility to comply with the Equal Employment Opportunity requirements in all contracts by the City of Bloomington?

YES____ NO____

Section III. Employment Information

A. Please complete the company work force analysis on the bottom of this page. Use the number of employees as of the most recent payroll period. Be sure to complete all applicable columns.
B. Job Classifications (See descriptions attached)
C. Identify the geographical area(s) from which the company may reasonably recruit employees (use city, county, SMSA, or distance in miles from company location, etc.)
D. If minorities and women are currently under -utilized in your work force, please attach a copy of an explanation for your plan to recruit and hire minorities and women.

THIS PAGE IS MANDATORY

CONTRACT COMPLIANCE WORKFORCE ANALYSIS

Job Categories	Overall Totals		White(Not of Hispanic origin)		Black of African American (Not of Hispanic Origin)		Hispanic of Latino		Asian or Pacific Islander		American Indian or Alaskan Native	
	M	F	M	F	M	F	M	F	M	F	M	F
(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	(J)	(K)	(L)	(M)
Officials & Managers												
Professionals												
Technicians												
Office & Clerical												
Craft Workers (skilled)												
Operatives (semi-skilled)												
Laborers (unskilled)												
Service Workers												
TOTAL												

M= Male, Column B is sum of Rows D, F, H, J and L.

F= Female, Column C is sum of rows E, G, I, K and M.

Date of above date: _____

Name of person that compiled the above data _____

Title of Person that compiled the above data _____

THIS PAGE IS MANDATORY

Section IV. Certification

The Company certifies that it has answered all of the foregoing questions truthfully to the best of its knowledge and belief. The Company also agrees that it will comply and abide by the City's Contract Compliance Ordinance and the City of Bloomington Human Relations Ordinance. In addition, The Company also certifies that it has not been barred from contracting with a unit of State or Local Government as a result of a violation of Section 33E-3 or 33E-4 of the Illinois Criminal Code of 1961, as amended; and The Company certifies that it is aware that all contracts for the construction of public works are subject to the Illinois Prevailing Wage Act (820 ILCS 130/1-12).

Signature:	Typed Name & Title	Telephone Number	Date

RESOLUTION NO. 2013 - 16

**A RESOLUTION OF THE CITY OF BLOOMINGTON, McLEAN COUNTY, ILLINOIS
ASCERTAINING THE PREVAILING RATES OF WAGES FOR LABORERS, WORKERS AND
MECHANICS ENGAGED IN PUBLIC WORKS
WITH THE CITY OF BLOOMINGTON**

WHEREAS, the Prevailing Wage Laws, 820 ILCS 130/1 et seq., as amended, require that each public body awarding any construction contract for public work or doing such work by day labor shall ascertain the general prevailing hourly rates of wages for employees engaged on such work; and

WHEREAS, "public work", as defined in the Prevailing Wage Law, includes commercial or industrial projects financed in whole or in part through the issuance of revenue bonds by the City of Bloomington under authority of the Industrial Project Bond Act or Home Rule Ordinance or financed in whole or in part through other public funds, without regard to what person or entity formally contracts for such work; and

WHEREAS, the statutes further provide that said rates be published, publicly posted and/or kept available for inspection by any interested party in the Office of the Secretary of State and Labor Department; and

WHEREAS, the City of Bloomington believes Prevailing Wage Law should apply to private commercial economic development projects directly supported by public funds, including projects supported by Tax Increment Financing or tax incentives of any kind; and

WHEREAS, the City of Bloomington believes that contractors awarded contracts for public work as defined by state statute and this Resolution should, as a prerequisite to such contract, provide proof of participation in apprenticeship and training programs approved and registered with the United States Department of Labor's Bureau of Apprenticeship and Training for all construction contracts in excess of \$100,000.

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Bloomington, County of McLean, State of Illinois that the prevailing wages as established and regularly updated by the Illinois Department of Labor are incorporated herein by reference as the prevailing rates of hourly wages in the City of Bloomington, Illinois for the laborers, workers and mechanics specified therein who are engaged in the construction of public works within the jurisdiction of this municipality; and

BE IT RESOLVED that the prevailing wages as established and regularly updated by the Illinois Department of Labor shall be paid to laborers, workers and mechanics specified therein when such persons perform work on private commercial economic development projects directly supported by public funds, including projects supported by Tax Increment Financing or tax incentives of any kind; and

BE IT RESOLVED that contractors shall submit to the City on a monthly basis all certified payroll records for prevailing wage work performed by contractor employees and subcontractors. The certified payroll records must include the following for each employee employed on the project: Name, Address, Telephone Number, Social Security Number, Job Classification, hourly wages paid in each pay period, number of hours worked each day and starting and ending time of work each day. The contractor shall submit these records with a signed statement that the records are true and accurate, that the wages paid to

each worker are not less than the prevailing rate and that the contractor is aware that filing records known to be false is a Class B misdemeanor offense; and

BE IT RESOLVED that contractors awarded contracts for public work as defined by state statute and this Resolution should, as a prerequisite to such contract, provide proof of participation in apprenticeship and training programs approved and registered with the United States Department of Labor's Bureau of Apprenticeship and Training for all construction contracts in excess of \$100,000; and

BE IT RESOLVED that nothing herein contained shall be construed to apply said prevailing hourly rates of wages in the locality to any work or employment other than public works or private commercial economic development projects directly supported by public funds as defined in the Act and this Resolution; and

BE IT RESOLVED that contractors awarded contracts for public work as defined by state statute and this Resolution should, as a prerequisite to such contract, obtain the current prevailing wage rates from the Illinois Department of Labor and regularly check for updated prevailing wage rates during the entire duration of said contract; and

BE IT RESOLVED that the City Clerk shall mail a copy of this Resolution to any employer, any association of employers, and to any person or association of employees who have filed or do file their names and addresses with the Clerk requesting copies of any determination under said law of the particular rates and of the particular classes of persons whose wages will be affected by such rates; and

BE IT RESOLVED that the City Clerk shall promptly file a certified copy of this Resolution with the Secretary of State and the Department of Labor of the State of Illinois; and

BE IT RESOLVED that the City Clerk, as required by law, shall cause to be published in a newspaper of general circulation within the area of this municipality a notice of this Resolution and that it is the effective prevailing wage determination of this public body.

ADOPTED this 9th day of December, 2013

APPROVED this 10th day of December, 2013

APPROVED:

Tari Renner
Mayor

ATTEST:

Tracey Covert
City Clerk

McLean County Prevailing Wage for January 2014

(See explanation of column headings at bottom of wages)

Trade Name	RG	TYP	C	Base	FRMAN	M-F>8	OSA	OSH	H/W	Pensn	Vac	Trng
ASBESTOS ABT-GEN		BLD		30.220	31.220	1.5	1.5	2.0	7.700	9.290	0.000	0.800
ASBESTOS ABT-GEN		HWY		32.080	32.630	1.5	1.5	2.0	7.700	9.290	0.000	0.800
ASBESTOS ABT-MEC		BLD		32.140	34.640	1.5	1.5	2.0	11.17	10.76	0.000	0.720
BOILERMAKER		BLD		36.000	39.000	2.0	2.0	2.0	7.070	14.69	0.000	0.350
BRICK MASON		BLD		29.820	31.320	1.5	1.5	2.0	8.300	11.60	0.000	0.580
CARPENTER		BLD		30.050	32.300	1.5	1.5	2.0	7.700	13.91	0.000	0.520
CARPENTER		HWY		31.000	33.250	1.5	1.5	2.0	7.700	14.96	0.000	0.520
CEMENT MASON		ALL		30.590	31.590	1.5	1.5	2.0	6.300	11.00	0.000	0.600
CERAMIC TILE FNSHER		BLD		29.750	0.000	1.5	1.5	2.0	8.300	9.500	0.000	0.580
ELECTRIC PWR EQMT OP		ALL		35.440	0.000	1.5	1.5	2.0	5.000	10.98	0.000	0.270
ELECTRIC PWR GRNDMAN		ALL		24.320	0.000	1.5	1.5	2.0	5.000	7.540	0.000	0.180
ELECTRIC PWR LINEMAN		ALL		39.370	41.910	1.5	1.5	2.0	5.000	12.20	0.000	0.300
ELECTRIC PWR TRK DRV		ALL		25.510	0.000	1.5	1.5	2.0	5.000	7.920	0.000	0.190
ELECTRICIAN		BLD		34.950	38.340	1.5	1.5	2.0	5.600	10.05	0.000	0.870
ELECTRONIC SYS TECH		BLD		29.420	31.170	1.5	1.5	2.0	5.350	7.330	0.000	0.400
ELEVATOR CONSTRUCTOR		BLD		40.520	45.585	2.0	2.0	2.0	11.88	12.71	3.240	0.600
FENCE ERECTOR	E	ALL		31.610	33.510	1.5	1.5	2.0	8.840	9.020	0.000	0.900
GLAZIER		BLD		31.670	33.670	1.5	1.5	2.0	9.950	7.700	0.000	1.250
HT/FROST INSULATOR		BLD		42.850	45.350	1.5	1.5	2.0	11.17	11.96	0.000	0.720
IRON WORKER	E	ALL		31.610	33.510	1.5	1.5	2.0	8.840	9.020	0.000	0.900
IRON WORKER	W	BLD		31.010	32.910	1.5	1.5	2.0	9.390	12.26	0.000	0.540
IRON WORKER	W	HWY		34.580	36.580	1.5	1.5	2.0	9.390	12.26	0.000	0.390
LABORER		BLD		29.220	30.220	1.5	1.5	2.0	7.700	9.290	0.000	0.800
LABORER		HWY		31.080	31.630	1.5	1.5	2.0	7.700	9.290	0.000	0.800
LABORER, SKILLED		BLD		29.220	30.220	1.5	1.5	2.0	7.700	9.290	0.000	0.800
LABORER, SKILLED		HWY		31.080	31.630	1.5	1.5	2.0	7.700	9.290	0.000	0.800
LATHER		BLD		30.050	32.300	1.5	1.5	2.0	7.700	13.91	0.000	0.520
MACHINERY MOVER	W	HWY		34.580	36.580	1.5	1.5	2.0	9.390	12.26	0.000	0.390
MACHINIST		BLD		43.920	46.420	1.5	1.5	2.0	6.760	8.950	1.850	0.000
MARBLE FINISHERS		BLD		29.750	0.000	1.5	1.5	2.0	8.300	9.500	0.000	0.580
MARBLE MASON		BLD		31.510	32.760	1.5	1.5	2.0	8.300	9.500	0.000	0.580
MILLWRIGHT		BLD		30.300	32.550	1.5	1.5	2.0	7.700	14.09	0.000	0.520
MILLWRIGHT		HWY		31.820	34.070	1.5	1.5	2.0	7.700	14.64	0.000	0.520
OPERATING ENGINEER		BLD 1		36.000	39.000	1.5	1.5	2.0	6.750	16.60	0.000	3.000
OPERATING ENGINEER		BLD 2		33.490	39.000	1.5	1.5	2.0	6.750	16.60	0.000	3.000
OPERATING ENGINEER		BLD 3		29.340	39.000	1.5	1.5	2.0	6.750	16.60	0.000	3.000
OPERATING ENGINEER		HWY 1		36.000	39.500	1.5	1.5	2.0	6.750	16.60	0.000	3.000
OPERATING ENGINEER		HWY 2		33.490	39.500	1.5	1.5	2.0	6.750	16.60	0.000	3.000
OPERATING ENGINEER		HWY 3		29.340	39.500	1.5	1.5	2.0	6.750	16.60	0.000	3.000
PAINTER		ALL		33.000	35.000	1.5	1.5	1.5	10.00	8.200	0.000	1.350
PAINTER SIGNS		BLD		33.920	38.090	1.5	1.5	1.5	2.600	2.710	0.000	0.000
PILEDRIIVER		BLD		30.550	32.800	1.5	1.5	2.0	7.700	13.91	0.000	0.520
PILEDRIIVER		HWY		32.000	34.250	1.5	1.5	2.0	7.700	14.96	0.000	0.520
PIPEFITTER		BLD		39.650	42.820	1.5	1.5	2.0	7.000	10.15	0.000	1.850
PLASTERER		BLD		30.000	32.000	1.5	1.5	2.0	7.100	13.83	0.000	0.490
PLUMBER		BLD		39.650	42.820	1.5	1.5	2.0	7.000	10.15	0.000	1.850
ROOFER		BLD		29.580	31.060	1.5	1.5	2.0	8.450	7.220	0.000	0.250
SHEETMETAL WORKER		BLD		32.150	33.760	1.5	1.5	2.0	8.270	14.18	0.000	0.780
SIGN HANGER	W	HWY		34.580	36.580	1.5	1.5	2.0	9.390	12.26	0.000	0.390
SPRINKLER FITTER		BLD		37.120	39.870	1.5	1.5	2.0	8.420	8.500	0.000	0.350
STEEL ERECTOR	W	HWY		34.580	36.580	1.5	1.5	2.0	9.390	12.26	0.000	0.390
SURVEY WORKER		ALL		31.080	31.630	1.5	1.5	2.0	7.700	9.290	0.000	0.800

TERRAZZO FINISHER	BLD	29.750	0.000	1.5	1.5	2.0	8.300	9.500	0.000	0.580
TERRAZZO MASON	BLD	31.510	32.760	1.5	1.5	2.0	8.300	9.500	0.000	0.580
TILE MASON	BLD	31.510	32.760	1.5	1.5	2.0	8.300	9.500	0.000	0.580
TRUCK DRIVER	O&C 1	24.980	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250
TRUCK DRIVER	O&C 2	25.340	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250
TRUCK DRIVER	O&C 3	25.510	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250
TRUCK DRIVER	O&C 4	25.740	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250
TRUCK DRIVER	O&C 5	26.420	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250
TRUCK DRIVER	N ALL 1	35.650	36.200	1.5	1.5	2.0	7.250	6.319	0.000	0.250
TRUCK DRIVER	N ALL 2	35.800	36.200	1.5	1.5	2.0	7.250	6.319	0.000	0.250
TRUCK DRIVER	N ALL 3	36.000	36.200	1.5	1.5	2.0	7.250	6.319	0.000	0.250
TRUCK DRIVER	N ALL 4	36.200	36.200	1.5	1.5	2.0	7.250	6.319	0.000	0.250
TRUCK DRIVER	S ALL 1	31.230	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250
TRUCK DRIVER	S ALL 2	31.680	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250
TRUCK DRIVER	S ALL 3	31.890	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250
TRUCK DRIVER	S ALL 4	32.180	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250
TRUCK DRIVER	S ALL 5	33.020	0.000	1.5	1.5	2.0	10.30	4.840	0.000	0.250

Legend:

RG (Region)
TYP (Trade Type - All, Highway, Building, Floating, Oil & Chip, Rivers)
C (Class)
Base (Base Wage Rate)
FRMAN (Foreman Rate)
H-F>8 (OT required for any hour greater than 8 worked each day, Mon through Fri.
OSA (Overtime (OT) is required for every hour worked on Saturday)
OSH (Overtime is required for every hour worked on Sunday and Holidays)
H/W (Health & Welfare Insurance)
Pensn (Pension)
Vac (Vacation)
Trng (Training)

Explanations**MCLEAN COUNTY**

FENCE ERECTOR - See Ironworkers.

IRONWORKERS (EAST) - That part of the county East of a diagonal line from Heyworth to a point half way between Chenoa and Weston.

TEAMSTERS (NORTH) - North of a straight line starting on the west side where Route 24 crosses McClean County line in a southeasterly direction to the most south-southwestern corner of Livingston County.

The following list is considered as those days for which holiday rates of wages for work performed apply: New Years Day, Memorial Day, Fourth of July, Labor Day, Thanksgiving Day, Christmas Day and Veterans Day in some classifications/counties. Generally, any of these holidays which fall on a Sunday is celebrated on the following Monday. This then makes work performed on that Monday payable at the appropriate overtime rate for holiday pay. Common practice in a given local may alter certain days of celebration. If in doubt, please check with IDOL.

Oil and chip resealing (O&C) means the application of road oils and liquid asphalt to coat an existing road surface, followed by application of aggregate chips or gravel to coated surface, and subsequent rolling of material to seal the surface.

EXPLANATION OF CLASSES

ASBESTOS - GENERAL - removal of asbestos material/mold and hazardous materials from any place in a building, including mechanical systems where those mechanical systems are to be removed. This includes the removal of asbestos materials/mold and hazardous materials from ductwork or pipes in a building when the building is to be demolished at the time or at some close future date.

ASBESTOS - MECHANICAL - removal of asbestos material from mechanical systems, such as pipes, ducts, and boilers, where the mechanical systems are to remain.

CERAMIC TILE FINISHER, MARBLE FINISHER, TERRAZZO FINISHER

Assisting, helping or supporting the tile, marble and terrazzo mechanic by performing their historic and traditional work assignments required to complete the proper installation of the work covered by said crafts. The term "Ceramic" is used for naming the classification only and is in no way a limitation of the product handled. Ceramic takes into consideration most hard tiles.

ELECTRONIC SYSTEMS TECHNICIAN

Installation, service and maintenance of low-voltage systems which utilizes the transmission and/or transference of voice, sound, vision, or digital for commercial, education, security and entertainment purposes for the following: TV monitoring and surveillance, background/foreground music, intercom and telephone interconnect, field programming, inventory control systems, microwave transmission, multi-media, multiplex, radio page, school, intercom and sound burglar alarms and low voltage master clock systems.

Excluded from this classification are energy management systems, life safety systems, supervisory controls and data acquisition systems not intrinsic with the above listed systems, fire alarm systems, nurse call systems and raceways exceeding fifteen feet in length.

LABORER, SKILLED - BUILDING

The skilled laborer building (BLD) classification shall encompass the following types of work, irrespective of the site of the work: tending of carpenters in unloading, handling, stockpiling and distribution operations, also other building crafts, mixing, handling, and conveying of all materials used by masons, plasterers and other building construction crafts, whether done by hand or by any process. The drying of plastering when done by salamander heat, and the cleaning and clearing of all debris. All work pertaining to and in preparation of asbestos abatement and removal. The building of scaffolding and staging for masons and plasterers. The excavations for buildings and all other construction, digging, of trenches, piers, foundations and holes, digging, lagging, sheeting, cribbing, bracing and propping of foundations, holes, caissons, cofferdams, and dikes, the setting of all guidelines for machine or hand excavation and subgrading. The mixing, handling, conveying, pouring, vibrating, gunniting and otherwise applying of concrete, whether by hand or other method of concrete for any walls, foundations, floors, or for other construction concrete sealant men. The wrecking, stripping, dismantling, and handling of concrete forms and false work, and the building of centers for fireproofing purposes. Boring machine, gas,

electric or air in preparation for shoving pipe, telephone cable, and so forth, under highways, roads, streets and alleys. All hand and power operating cross cut saws when used for clearing. All work in compressed air construction. All work on acetylene burners in salvaging. The blocking and tamping of concrete. The laying of sewer tile and conduit, and pre-cast materials. The assembling and dismantling of all jacks and sectional scaffolding, including elevator construction and running of slip form jacks. The work of drill running and blasting, including wagon drills. The wrecking, stripping, dismantling, cleaning, moving and oiling of forms. The cutting off of concrete piles. The loading, unloading, handling and carrying to place of installation of all rods, (and materials for use in reinforcing) concrete and the hoisting of same and all signaling where hoist is used in this type of construction coming under the jurisdiction of the Laborers' Union. And, all other labor work not awarded to any other craft. Mortar mixers, kettlemen and carrier of hot stuff, tool crib men, watchmen (Laborer), firemen or salamander tenders, flagmen, deck hands, installation and maintenance of temporary gas-fired heating units, gravel box men, dumpmen and spotters, fencing Laborers, cleaning lumber, pit men, material checkers, dispatchers, unloading explosives, asphalt plant laborers, writer of scale tickets, fireproofing laborers, janitors, asbestos abatement and removal laborers, handling of materials treated with oil, creosote, chloride, asphalt, and/or foreign material harmful to skin or clothing, Laborers with de-watering systems, gunnite nozzle men, laborers tending masons with hot material or where foreign materials are used, Laborers handling masterplate or similar materials, laser beam operator, concrete burning machine operator, material selector men working with firebrick or combustible material, dynamite men, track laborers, cement handlers, chloride handlers, the unloading and laborers with steel workers and re-bars, concrete workers (wet), luteman, asphalt raker, curb asphalt machine operator, ready mix scalemen, permanent, portable or temporary plant drilling machine operator, plaster tenders, underpinning and shoring of buildings, fire watch, signaling of all power equipment, to include trucks excavating equipment, etc., tree topper or trimmer when in connection to construction, tunnel helpers in free air, batch dumpers, kettle and tar men, tank cleaners, plastic installers, scaffold workers, motorized buggies or motorized unit used for wet concrete or handling of building materials, sewer workers, rod and chain men, vibrator operators, mortar mixer operator, cement silica, clay, fly ash, lime and plasters, handlers (bulk or bag), cofferdam workers, on concrete paving, placing, cutting and tying of reinforcing, deck hand, dredge hand and shore laborers, bankmen on floating plant, asphalt workers with machine & layers, grade checker, power tools, caisson workers, lead man on sewer work, welders, cutters, burners and torch men, chain saw operators, paving breaker, jackhammer and drill operator, layout man and/or drainage tile layer, steel form setters -- street and highway, air tamping hammerman, signal man on crane, concrete saw operator, screen man on asphalt pavers, front end man on chip spreader, multiple concrete duct -- lead man.

LABORER, SKILLED - HIGHWAY

The skilled laborer heavy and highway (HWY) classification shall encompass the following types of work, irrespective of the site of the work: handling of materials treated with oil, creosote, asphalt and/or any foreign materials harmful to skin or clothing, track laborers, chloride handlers, the unloading and loading with steel

workers and re-bars, concrete workers (wet), tunnel helpers in free air, batch dumpers, mason tenders, kettle and tar men, plastic installers, scaffold workers, motorized buggies or motorized unit used for wet concrete or handling of building materials, laborers with de-watering systems, sewer workers plus depth, rod and chainmen, vibrator operators, mortar mixer operators, cement silica, clay, fly ash, lime and plasters, handlers (bulk or bag), cofferdam workers plus depth, on concrete paving, placing, cutting and tying or reinforcing, deck hand, dredge hand shore laborers, bankmen on floating plant, asphalt workers with machine, and layers, grade checker, power tools, stripping of all concrete forms excluding paving forms, dumpmen and spotters, when necessary, caisson workers plus depth, gunnite nozzle men, welders, cutters, burners and torchmen, chain saw operators, paving breaker, jackhammer and drill operators, layout man and/or drainage tile layer, steel form setters - street and highway, air tamping hammerman, signal man on crane, concrete saw operator, screedman on asphalt pavers, front end man on chip spreader, multiple concrete duct, luteman, asphalt raker, curb asphalt machine operator, ready mix scalemen (portable or temporary plant), laser beam operator, concrete burning machine operator, and coring machine operator.

SURVEY WORKER - Operated survey equipment including data collectors, G.P.S. and robotic instruments, as well as conventional levels and transits.

TRUCK DRIVER - BUILDING, HEAVY AND HIGHWAY CONSTRUCTION - SOUTH

Class 1. Drivers on 2 axle trucks hauling less than 9 ton. Air compressor and welding machines and brooms, including those pulled by separate units, truck driver helpers, warehouse employees, mechanic helpers, greasers and tiremen, pickup trucks when hauling materials, tools, or workers to and from and on-the-job site, and fork lifts up to 6,000 lb. capacity.

Class 2. Two or three axle trucks hauling more than 9 ton but hauling less than 16 ton. A-frame winch trucks, hydrolift trucks, vector trucks or similar equipment when used for transportation purposes. Fork lifts over 6,000 lb. capacity, winch trucks, four axle combination units, and ticket writers.

Class 3. Two, three or four axle trucks hauling 16 ton or more. Drivers on water pulls, articulated dump trucks, mechanics and working forepersons, and dispatchers. Five axle or more combination units.

Class 4. Low Boy and Oil Distributors.

Class 5. Drivers who require special protective clothing while employed on hazardous waste work.

TRUCK DRIVER - BUILDING, HEAVY AND HIGHWAY CONSTRUCTION - NORTH

Class 1. Two or three Axle Trucks. A-frame Truck when used for transportation purposes; Air Compressors and Welding Machines, including those pulled by cars, pick-up trucks and tractors; Ambulances; Batch Gate Lockers; Batch Hopperman; Car and Truck Washers; Carry-alls; Fork Lifts and Hoisters; Helpers; Mechanics Helpers and Greasers; Oil Distributors 2-man operation; Pavement Breakers; Pole Trailer, up to 40 feet; Power Mower Tractors;

Self-propelled Chip Spreader; Skipman; Slurry Trucks, 2-man operation; Slurry Truck Conveyor Operation, 2 or 3 man; Teamsters; Unskilled dumpman; and Truck Drivers hauling warning lights, barricades, and portable toilets on the job site.

Class 2. Four axle trucks; Dump Crets and Adgetors under 7 yards; Dumpsters, Track Trucks, Euclids, Hug Bottom Dump Turnapulls or Turnatrailers when pulling other than self-loading equipment or similar equipment under 16 cubic yards; Mixer Trucks under 7 yards; Ready-mix Plant Hopper Operator, and Winch Trucks, 2 Axles.

Class 3. Five axle trucks; Dump Crets and Adgetors 7 yards and over; Dumpsters, Track Trucks, Euclids, Hug Bottom Dump Turnatrailers or turnapulls when pulling other than self-loading equipment or similar equipment over 16 cubic yards; Explosives and/or Fission Material Trucks; Mixer Trucks 7 yards or over; Mobile Cranes while in transit; Oil Distributors, 1-man operation; Pole Trailer, over 40 feet; Pole and Expandable Trailers hauling material over 50 feet long; Slurry trucks, 1-man operation; Winch trucks, 3 axles or more; Mechanic--Truck Welder and Truck Painter.

Class 4. Six axle trucks; Dual-purpose vehicles, such as mounted crane trucks with hoist and accessories; Foreman; Master Mechanic; Self-loading equipment like P.B. and trucks with scoops on the front. TRUCK DRIVER - OIL AND CHIP RESEALING ONLY.

This shall encompass laborers, workers and mechanics who drive contractor or subcontractor owned, leased, or hired pickup, dump, service, or oil distributor trucks. The work includes transporting materials and equipment (including but not limited to, oils, aggregate supplies, parts, machinery and tools) to or from the job site; distributing oil or liquid asphalt and aggregate; stock piling material when in connection with the actual oil and chip contract. The Truck Driver (Oil & Chip Resealing) wage classification does not include supplier delivered materials.

OPERATING ENGINEERS - BUILDING

Class 1. Cranes; Overhead Cranes; Gradall; All Cherry Pickers; Mechanics; Central Concrete Mixing Plant Operator; Road Pavers (27E - Dual Drum - Tri Batchers); Blacktop Plant Operators and Plant Engineers; 3 Drum Hoist; Derricks; Hydro Cranes; Shovels; Skimmer Scoops; Koehring Scooper; Drag Lines; Backhoe; Derrick Boats; Pile Drivers and Skid Rigs; Clamshells; Locomotive Cranes; Dredge (all types) Motor Patrol; Power Blades - Dumore - Elevating and similar types; Tower Cranes (Crawler-Mobile) and Stationary; Crane-type Backfiller; Drott Yumbo and similar types considered as Cranes; Caisson Rigs; Dozer; Tournadozer; Work Boats; Ross Carrier; Helicopter; Tournapulls - all and similar types; Scoops (all sizes); Pushcats; Endloaders (all types); Asphalt Surfacing Machine; Slip Form Paver; Rock Crusher; Heavy Equipment Greaser; CMI, CMI Belt Placer, Auto Grade & 3 Track and similar types; Side Booms; Multiple Unit Earth Movers; Creter Crane; Trench Machine; Pump-crete-Belt Crete-Squeeze Cretes-Screw-type Pumps and Gypsum; Bulker & Pump - Operator will clean; Formless Finishing Machine; Flaherty Spreader or similar types; Screed Man on Laydown Machine; Wheel Tractors (industrial or Farm-type w/Dozer-Hoe-Endloader or other attachments); F.W.D. & Similar Types; Vermeer Concrete Saw.

Class 2. Dinkeys; Power Launches; PH One-pass Soil Cement Machine (and similar types); Pugmill with Pump; Backfillers; Euclid Loader; Forklifts; Jeeps w/Ditching Machine or other attachments; Tunneluger; Automatic Cement and Gravel Batching Plants; Mobile Drills (Soil Testing) and similar types; Gurries and Similar Types; (1) and (2) Drum Hoists (Buck Hoist and Similar Types); Chicago Boom; Boring Machine & Pipe Jacking Machine; Hydro Boom; Dewatering System; Straw Blower; Hydro Seeder; Assistant Heavy Equipment Greaser on Spread; Tractors (Track type) without Power Unit pulling Rollers; Rollers on Asphalt -- Brick Macadem; Concrete Breakers; Concrete Spreaders; Mule Pulling Rollers; Center Stripper; Cement Finishing Machines & CMI Texture & Reel Curing Machines; Cement Finishing Machine; Barber Green or similar loaders; Vibro Tamper (All similar types) Self-propelled; Winch or Boom Truck; Mechanical Bull Floats; Mixers over 3 Bag to 27E; Tractor pulling Power Blade or Elevating Grader; Porter Rex Rail; Clary Screed; Truck Type Hoptoe Oilers; Fireman; Spray Machine on Paving; Curb Machines; Truck Crane Oilers; Oil Distributor; Truck-Mounted Saws.

Class 3. Air Compressor; Power Subgrader; Straight Tractor; Trac Air without attachments; Herman Nelson Heater, Dravo, Warner, Silent Glo, and similar types; Roller: Five (5) Ton and under on Earth or Gravel; Form Grader; Crawler Crane & Skid Rig Oilers; Freight Elevators - permanently installed; Pump; Light Plant; Generator; Conveyor (1) or (2) - Operator will clean; Welding Machine; Mixer (3) Bag and Under (Standard Capacity with skip); Bulk Cement Plant; Oiler on Central Concrete Mixing Plant.

OPERATING ENGINEERS - HEAVY AND HIGHWAY CONSTRUCTION

CLASS 1. Cranes; Hydro Cranes; Shovels; Crane Type Backfiller; Tower, Mobile, Crawler, & Stationary Cranes; Derricks; Hoists (3 Drum); Draglines; Drott Yumbo & Similar Types considered as Cranes; 360 Degree Swing Excavator (Shears, Grapples, Movacs, etc.); Back Hoe; Derrick Boats; Pile Driver and Skid Rigs; Clam Shell; Locomotive - Cranes; Road Pavers - Single Drum - Dual Drum - Tri Batcher; Motor Patrols & Power Blades - Dumore - Elevating & Similar Types; Mechanics; Central Concrete Mixing Plant Operator; Asphalt Batch Plant Operators and Plant Engineers; Gradall; Caisson Rigs; Skimmer Scoop - Koering Scooper; Dredges (all types); Hoptoe; All Cherry Pickers; Work Boat; Ross Carrier; Helicopter; Dozer; Tournadozer; Tournapulls - all and similar types; Operation of Concrete and all Recycle Machines; Multiple Unit Earth Movers; Scoops (all sizes); Pushcats; Endloaders (all types); Asphalt Surfacing Machine; Slip Form Paver; Rock Crusher; Operation of Material Crusher, Screening Plants, and Tunnel Boring Machine; Heavy Equipment Greaser (top greaser on spread); CMI, Auto Grade, CMI Belt Placer & 3 Track and Similar Types; Side Booms; Asphalt Heater & Planer Combination (used to plane streets); Wheel Tractors (with Dozer, Hoe or Endloader Attachments); CAT Earthwork Compactors and Similar Types; Blaw Knox Spreader and Similar Types; Trench Machines; Pump Crete - Belt Crete - Squeeze Crete - Screw Type Pumps and Gypsum (operator will clean); Creter Crane; Operation of Concrete Pump Truck; Formless Finishing Machines; Flaherty Spreader or Similar Types; Screed Man on Laydown Machine; Vermeer Concrete Saw; Operation of Laser Screed; Span Saw; Dredge Leverman; Dredge Engineer; Lull or Similar Type; Hydro-Boom Truck; Operation of Guard Rail Machine; and Starting Engineer on Pipeline or Construction (11 or more pieces) including: Air Compressor (Trailer Mounted), All Forced Air Heaters (regardless of Size), Water Pumps

(Greater than 4-1/2" or Total Discharge Over 4-1/2"), Light Plants, Generators (Trailer Mounted - Excluding Decontamination Trailer), Welding Machines (Any Size or Mode of Power), Conveyor, Mixer (any size), Stud Welder, Power Pac, etc., and Ground Heater (Trailer Mounted).

CLASS 2. Bulker & Pump; Power Launches; Boring Machine & Pipe Jacking Machine; Dinkeys; Operation of Carts, Powered Haul Unit for a Boring Machine; P & H One Pass Soil Cement Machines and Similar Types; Wheel Tractors (Industry or Farm Type - Other); Back Fillers; Euclid Loader; Fork Lifts; Jeep w/Ditching Machine or Other Attachments; Tunneluger; Automatic Cement & Gravel Batching Plants; Mobile Drills - Soil Testing and Similar Types; Pugmill with Pump; All (1) and (2) Drum Hoists; Dewatering System; Straw Blower; Hydro-Seeder; Bump Grinders (self-propelled); Assistant Heavy Equipment Greaser; Apsco Spreader; Tractors (Track-Type) without Power Units Pulling Rollers; Rollers on Asphalt - Brick or Macadam; Concrete Breakers; Concrete Spreaders; Cement Strippers; Cement Finishing Machines & CMI Texture & Reel Curing Machines; Vibro-Tampers (All Similar Types Self-Propelled); Mechanical Bull Floats; Self-Propelled Concrete Saws; Truck Mounted Power Saws; Operation of Curb Cutters; Mixers - Over Three (3) Bags; Winch and Boom Trucks; Tractor Pulling Power Blade or Elevating Grader; Porter Rex Rail; Clary Screed; Mule Pulling Rollers; Pugmill without Pump; Barber Greene or Similar Loaders; Track Type Tractor w/Power Unit attached (minimum); Fireman; Spray Machine on Paving; Curb Machines; Paved Ditch Machine; Power Broom; Self-Propelled Sweepers; Self-Propelled Conveyors; Power Subgrader; Oil Distributor; Straight Tractor; Truck Crane Oiler; Truck Type Oilers; Directional Boring Machine; Horizontal Directional Drill; Articulating End Dump Vehicles; Starting Engineer on Pipeline or Construction (6 -10 pieces) including: Air Compressor (Trailer Mounted), All Forced Air Heaters (regardless of Size), Water Pumps (Greater than 4-1/2" or Total Discharge Over 4-1/2"), Light Plants, Generators (Trailer Mounted - Excluding Decontamination Trailer), Welding Machines (Any Size or Mode of Power), Conveyor, Mixer (any size), Stud Welder, Power Pac, etc., and Ground Heater (Trailer Mounted).

CLASS 3. Straight Framed Truck Mounted Vac Unit (separately powered); Trac Air Machine (without attachments); Rollers - Five Ton and Under on Earth and Gravel; Form Graders; Bulk Cement Plant; Oilers; and Starting Engineer on Pipeline or Construction (3 - 5 pieces) including: Air Compressor (Trailer Mounted), All Forced Air Heaters (regardless of Size), Water Pumps (Greater than 4-1/2" or Total Discharge Over 4-1/2"), Light Plants, Generators (Trailer Mounted - Excluding Decontamination Trailer), Welding Machines (Any Size or Mode of Power), Conveyor, Mixer (any size), Stud Welder, Power Pac, etc., and Ground Heater (Trailer Mounted).

Other Classifications of Work:

For definitions of classifications not otherwise set out, the Department generally has on file such definitions which are available. If a task to be performed is not subject to one of the classifications of pay set out, the Department will upon being contacted state which neighboring county has such a classification and provide such rate, such rate being deemed to exist by reference in this document. If no neighboring county rate applies to the task, the Department shall undertake a special determination, such special determination being then deemed to have existed under this

determination. If a project requires these, or any classification not listed, please contact IDOL at 217-782-1710 for wage rates or clarifications.

LANDSCAPING

Landscaping work falls under the existing classifications for laborer, operating engineer and truck driver. The work performed by landscape plantsman and landscape laborer is covered by the existing classification of laborer. The work performed by landscape operators (regardless of equipment used or its size) is covered by the classifications of operating engineer. The work performed by landscape truck drivers (regardless of size of truck driven) is covered by the classifications of truck driver.

SPECIFICATIONS:

Bloomington Public Library
Books are just the beginning.

Find

Use

See & Do

Participate

Bloomington, Illinois

Heating Upgrades

January 23, 2014

Project 0131113.00



200 W. College Ave., Suite 301, Normal, IL 61761 309/663-8436 FAX 309/663-8862 www.f-w.com

ENGINEERS | ARCHITECTS | SURVEYORS | SCIENTISTS

General Project Requirements

Summary of Work

Project Office

Prime Contractor is not expected to maintain a project office on-site for the project duration. Should that contractor choose to have such an office, no portion of the existing facility will be available for such use. Prime Contractor shall carefully coordinate the location, installation, and removal of said office with the Owner.

Material & Equipment Storage

Parking spaces reserved for use by the Prime Contractor and sub-contractors for the storage of project materials and equipment are designated on the project drawings. No other existing parking spaces maybe so used; and such usage shall be confirmed during the Pre-Construction meeting. Any project materials and equipment stored at this location (or stored indoors, inside the existing mechanical room) shall be maintained in a neat, orderly, and clean manner. And, kept as compact and non-disruptive to the surrounding area as possible.

Toilets

All Prime Contractor and sub-contractor personnel are allowed to use the existing restroom facilities, as long as such use does not in any way disrupt use of these facilities by the general public. And, as long as such personnel does not soil or otherwise damage these facilities.

Telephones & Cellphones

All Prime Contractor and sub-contractor personnel are expected to use their own cellphones while on-site for the project. Such cellphone use shall be accomplished away from the general public, so as not to disrupt the normal use of this facility. No project personnel will be allowed to use the telephones of this existing facility.

Parking

Parking spaces reserved for use by the Prime Contractor and sub-contractors are designated on the project drawings. No other existing parking spaces maybe so used; and such usage shall be confirmed during the Pre-Construction meeting.

Water Use

Prime Contractor and sub-contractors are allowed to use the Owner's water supply, as long as such use in no way disrupts the Owner's use of this water supply. And, as long as the Prime Contractor and sub-contractors provide all extensions and other appurtenances required for such use.

Electricity Use

Prime Contractor and sub-contractors are allowed to use the Owner's electric power supply, as long as such use in no way disrupts the Owner's use of this electric power supply. And, as long as the Prime Contractor and sub-contractors provide all extensions and other appurtenances required for such use.

Gas Use

Prime Contractor and sub-contractors are allowed to use the Owner's natural gas supply, as long as such use in no way disrupts the Owner's use of this natural gas supply. And, as long as the Prime Contractor and sub-contractors provide all extensions and other appurtenances required for such use.

Project Site Cleaning

Prime Contractor shall keep all project areas neat, clean, and free of any dust and debris. This shall include daily cleaning and refuse disposal; and shall apply to both public and back-of-house areas.

Open & Operational Library Facility

The existing library shall remain fully operational for the entire duration of the project. Prime Contractor and all sub-contractors shall plan accordingly, and shall not disrupt this full and complete operation in any way whatsoever.

Damage to Existing Property to Remain

All elements of the existing library shall be fully protected from any damage by the Prime Contractor and all sub-contractors. Any such damage that does occur shall be promptly and fully repaired, to the full and complete satisfaction of the Owner. The Owner and Project Engineer shall be the sole judges as to the satisfactory repair of any such damage.

Cutting & Patching & Demolition

All demolition and cutting of existing elements of the building shall be kept to a minimum, as is absolutely necessary to satisfactorily accomplish the new work. Prime Contractor and all sub-contractors shall discuss all such demolition and cutting (and proposed patching) with both Owner and Project Engineer prior to commencing this work. Prime Contractor and sub-contractors shall take full responsibility for all such demolition, cutting, and patching.

Sound & Dust Control

Excessive noise, dust, and other deleterious effects of the construction process shall be rigorously and continuously controlled by the Prime Contractor and all sub-contractors. Temporary partitions (of a design acceptable to Owner and Project Engineer) shall be provided to fully separate project area from remainder of the existing building.

Hazardous Materials

It is presently anticipated that no hazardous materials should be encountered during the course of project completion. Should any materials suspected to be hazardous be so encountered by either the Prime Contractor or any of the sub-contractors, project work shall be stopped immediately, and the Owner notified of such situation.

Allowances & Unit Prices

There are no allowances or unit prices that are to be provided as part of this project. Prime Contractor shall include in her or his bid all costs necessary to provide a complete, fully operational, and fully finished project installation.

Alternate Bids

There are one (1) or more alternate bids for this project. Prime Contractor shall include in such alternate bids all costs necessary to provide complete, fully operational, and fully finished installations (including any modifications to the Base Bid work to accommodate these alternate bids).

Substitutions

Multiple acceptable choices have been provided for most products specified for this project. Any substitutions from these specified products shall be noted with the bid submitted by the Prime Contractor for the project. These proposed substitutions shall include full and complete data illustrating that said substitution is fully equal to the product originally specified. Acceptance or rejection of proposed substitutions shall be by Owner, in consultation with Project Engineer, and shall be final.

Payment Procedures

Project Modifications

Submittals

Detailed shop drawings, product data, and/or samples shall be submitted for all project materials and systems, for review by the Owner and Project Engineer, prior to the purchase and delivery of such materials and systems. A schedule of these submittals shall be provided to the Owner and Project Engineer within seven (7) calendar days of award of the project; and

Project Schedules

Working Hours

Working hours for the Prime Contractor and all sub-contractor personnel shall be normal and customary business-day hours, Monday through Friday. No working hours outside that normal timeframe shall be considered when preparing project bids. Final working hours and building access arrangements shall be as mutually-agreed between the Owner and the Prime Contractor, and as discussed at the Pre-Construction meeting.

Project Meetings

Project Coordination

The Prime Contractor shall be fully responsible for fully coordinating all elements of the project, on a daily basis throughout the entire duration of the project, including all work of all sub-contractors, sub-sub-contractors, and suppliers. At the discretion of the Prime Contractor, a full-time site superintendent shall be provided by that Prime Contractor in order to successfully accomplish that project coordination. Any remedial work necessitated by the lack of full and continuous project coordination shall be the responsibility of the Prime Contractor.

Codes & Ordinances

The Prime Contractor and all sub-contractors shall be solely responsible for fully satisfying all codes, ordinances, laws, and other regulations applicable to this project. Should any element of the design drawings and/or the design specifications appear to not meet applicable design regulations, the Prime Contractor shall bring such issue to the immediate attention of all parties to the project.

Table of Contents

Division	Section Title	Pages
DIVISION 23 - HEATING VENTILATING AND AIR CONDITIONING		
230519	METERS AND GAGES FOR HVAC PIPING	6
230523	GENERAL-DUTY VALVES FOR HVAC PIPING	4
230529	HANGERS AND SUPPORTS FOR HVAC PIPING AND EQUIPMENT	6
230553	IDENTIFICATION FOR HVAC PIPING AND EQUIPMENT	3
230593	TESTING, ADJUSTING, AND BALANCING FOR HVAC	5
230719	HVAC PIPING INSULATION	9
230923	DIRECT DIGITAL CONTROL (DDC) SYSTEM FOR HVAC	26
231123	FACILITY NATURAL-GAS PIPING	7
232113	HYDRONIC PIPING	7
232116	HYDRONIC PIPING SPECIALTIES	3
232213	STEAM AND CONDENSATE HEATING PIPING	5
235100	BREECHINGS, CHIMNEYS, AND STACKS	3
235216	CONDENSING BOILERS	7
238413	HUMIDIFIERS	4

END OF TABLE OF CONTENTS

SECTION 230519 - METERS AND GAGES FOR HVAC PIPING

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section Includes:
 - 1. Bimetallic-actuated thermometers.
 - 2. Liquid-in-glass thermometers.
 - 3. Thermowells.
 - 4. Dial-type pressure gages.
 - 5. Gage attachments.
 - 6. Test plugs.

1.3 ACTION SUBMITTALS

- A. Product Data: For each type of product indicated.
- B. Wiring Diagrams: For power, signal, and control wiring.

1.4 CLOSEOUT SUBMITTALS

- A. Operation and Maintenance Data: For meters and gages to include in operation and maintenance manuals.

PART 2 - PRODUCTS

2.1 BIMETALLIC-ACTUATED THERMOMETERS

- A. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - 1. Ashcroft Inc.
 - 2. Ernst Flow Industries.
 - 3. Marsh Bellofram.
 - 4. Miljoco Corporation.
 - 5. Palmer Wahl Instrumentation Group.
 - 6. Trerice, H. O. Co.
 - 7. Weiss Instruments, Inc.
 - 8. WIKA Instrument Corporation - USA.

- B. Standard: ASME B40.200.
- C. Case: type(s); stainless steel with 5-inch nominal diameter.
- D. Dial: Nonreflective aluminum with permanently etched scale markings and scales in deg F.
- E. Connector Type(s): Union joint, adjustable angle, with unified-inch screw threads.
- F. Connector Size: 1/2 inch, with ASME B1.1 screw threads.
- G. Stem: 0.25 or 0.375 inch in diameter; stainless steel.
- H. Window: Plain glass or plastic.
- I. Ring: Stainless steel.
- J. Element: Bimetal coil.
- K. Pointer: Dark-colored metal.
- L. Accuracy: Plus or minus 1.5 percent of scale range.

2.2 LIQUID-IN-GLASS THERMOMETERS

A. Metal-Case, Industrial-Style, Liquid-in-Glass Thermometers:

- 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Miljoco Corporation.
 - b. Terice, H. O. Co.
 - c. Weiss Instruments, Inc.
- 2. Standard: ASME B40.200.
- 3. Case: Cast aluminum; 9-inch nominal size unless otherwise indicated.
- 4. Case Form: Adjustable angle unless otherwise indicated.
- 5. Tube: Glass with magnifying lens and blue or red organic liquid.
- 6. Tube Background: Nonreflective aluminum with permanently etched scale markings graduated in deg F.
- 7. Window: Glass or plastic.
- 8. Stem: Aluminum and of length to suit installation.
 - a. Design for Air-Duct Installation: With ventilated shroud.
 - b. Design for Thermowell Installation: Bare stem.
- 9. Connector: 1-1/4 inches, with ASME B1.1 screw threads.
- 10. Accuracy: Plus or minus 1 percent of scale range or one scale division, to a maximum of 1.5 percent of scale range.

B. Plastic-Case, Industrial-Style, Liquid-in-Glass Thermometers:

- 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:

- a. Ernst Flow Industries.
 - b. Marsh Bellofram.
 - c. Miljoco Corporation.
 - d. Palmer Wahl Instrumentation Group.
 - e. Weiss Instruments, Inc.
 - f. WIKA Instrument Corporation - USA.
2. Standard: ASME B40.200.
3. Case: Plastic; 9-inch nominal size unless otherwise indicated.
4. Case Form: Adjustable angle unless otherwise indicated.
5. Tube: Glass with magnifying lens and blue or red organic liquid.
6. Tube Background: Nonreflective aluminum with permanently etched scale markings graduated in deg F.
7. Window: Glass or plastic.
8. Stem: Aluminum, brass, or stainless steel and of length to suit installation.
 - a. Design for Air-Duct Installation: With ventilated shroud.
 - b. Design for Thermowell Installation: Bare stem.
9. Connector: 1-1/4 inches, with ASME B1.1 screw threads.
10. Accuracy: Plus or minus 1 percent of scale range or one scale division, to a maximum of 1.5 percent of scale range.

2.3 DUCT-THERMOMETER MOUNTING BRACKETS

- A. Description: Flanged bracket with screw holes, for attachment to air duct and made to hold thermometer stem.

2.4 THERMOWELLS

- A. Thermowells:
 1. Standard: ASME B40.200.
 2. Description: Pressure-tight, socket-type fitting made for insertion into piping tee fitting.
 3. Material for Use with Copper Tubing: CNR.
 4. Material for Use with Steel Piping: CSA.
 5. Type: Stepped shank unless straight or tapered shank is indicated.
 6. External Threads: NPS 1/2, NPS 3/4, or NPS 1, ASME B1.20.1 pipe threads.
 7. Internal Threads: 1/2, 3/4, and 1 inch, with ASME B1.1 screw threads.
 8. Bore: Diameter required to match thermometer bulb or stem.
 9. Insertion Length: Length required to match thermometer bulb or stem.
 10. Lagging Extension: Include on thermowells for insulated piping and tubing.
 11. Bushings: For converting size of thermowell's internal screw thread to size of thermometer connection.
- B. Heat-Transfer Medium: Mixture of graphite and glycerin.

2.5 PRESSURE GAGES

- A. Direct-Mounted, Metal-Case, Dial-Type Pressure Gages:

1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. AMETEK, Inc.; U.S. Gauge.
 - b. Ashcroft Inc.
 - c. Marsh Bellofram.
 - d. Miljoco Corporation.
 - e. Palmer Wahl Instrumentation Group.
 - f. Trerice, H. O. Co.
 - g. Weiss Instruments, Inc.
 - h. WIKA Instrument Corporation - USA.
2. Standard: ASME B40.100.
3. Case: Liquid-filled type(s); cast aluminum or drawn steel; 4-1/2-inch nominal diameter.
4. Pressure-Element Assembly: Bourdon tube unless otherwise indicated.
5. Pressure Connection: Brass, with NPS 1/4, ASME B1.20.1 pipe threads and bottom-outlet type unless back-outlet type is indicated.
6. Movement: Mechanical, with link to pressure element and connection to pointer.
7. Dial: Nonreflective aluminum with permanently etched scale markings graduated in psi.
8. Pointer: Dark-colored metal.
9. Window: Glass or plastic.
10. Ring: Metal.
11. Accuracy: Grade B, plus or minus 2 percent of middle half of scale range.

B. Direct-Mounted, Plastic-Case, Dial-Type Pressure Gages:

1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. AMETEK, Inc.; U.S. Gauge.
 - b. Ashcroft Inc.
 - c. Marsh Bellofram.
 - d. Miljoco Corporation.
 - e. Palmer Wahl Instrumentation Group.
 - f. Tel-Tru Manufacturing Company.
 - g. Weiss Instruments, Inc.
 - h. WIKA Instrument Corporation - USA.
2. Standard: ASME B40.100.
3. Case: Sealed type; plastic; 4-1/2-inch nominal diameter.
4. Pressure-Element Assembly: Bourdon tube unless otherwise indicated.
5. Pressure Connection: Brass, with NPS 1/4, ASME B1.20.1 pipe threads and bottom-outlet type unless back-outlet type is indicated.
6. Movement: Mechanical, with link to pressure element and connection to pointer.
7. Dial: Nonreflective aluminum with permanently etched scale markings graduated in psi.
8. Pointer: Dark-colored metal.
9. Window: Glass or plastic.
10. Accuracy: Grade B, plus or minus 2 percent of middle half of scale range.

2.6 GAGE ATTACHMENTS

- A. Snubbers: ASME B40.100, brass; with NPS 1/4, ASME B1.20.1 pipe threads and porous-metal-type surge-dampening device. Include extension for use on insulated piping.

- B. Valves: Brass or stainless-steel needle, with NPS 1/4, ASME B1.20.1 pipe threads.

2.7 TEST PLUGS

- A. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - 1. Miljoco Corporation.
 - 2. National Meter, Inc.
 - 3. Trerice, H. O. Co.
 - 4. Weiss Instruments, Inc.
- B. Description: Test-station fitting made for insertion into piping tee fitting.
- C. Body: Brass or stainless steel with core inserts and gasketed and threaded cap. Include extended stem on units to be installed in insulated piping.
- D. Thread Size: NPS 1/4, ASME B1.20.1 pipe thread.
- E. Minimum Pressure and Temperature Rating: 500 psig at 200 deg F.
- F. Core Inserts: Chlorosulfonated polyethylene synthetic self-sealing rubber.

PART 3 - EXECUTION

3.1 INSTALLATION

- A. Install thermowells with socket extending to center of pipe and in vertical position in piping tees.
- B. Install thermowells of sizes required to match thermometer connectors. Include bushings if required to match sizes.
- C. Install thermowells with extension on insulated piping.
- D. Fill thermowells with heat-transfer medium.
- E. Install direct-mounted thermometers in thermowells and adjust vertical and tilted positions.
- F. Install direct-mounted pressure gages in piping tees with pressure gage located on pipe at the most readable position.
- G. Install valve and snubber in piping for each pressure gage for fluids (except steam).
- H. Install test plugs in piping tees.
- I. Install thermometers in the following locations:
 - 1. Heating Hot Water Supply and Return at the boiler.
- J. Install pressure gages in the following locations:
 - 1. Supply and return water connections to the boiler.
 - 2. Steam outlet of the humidifier.

3.2 CONNECTIONS

- A. Install meters and gages adjacent to machines and equipment to allow service and maintenance of meters, gages, machines, and equipment.

3.3 ADJUSTING

- A. After installation, calibrate meters according to manufacturer's written instructions.
- B. Adjust faces of meters and gages to proper angle for best visibility.

3.4 THERMOMETER SCALE RANGE SCHEDULE

- A. Scale Range for Heating-Water Piping: 30 to 240 deg F.

3.5 PRESSURE-GAGE SCHEDULE

- A. Pressure gages at inlet and outlet of each hydronic boiler shall be one of the following:
 - 1. Liquid-filled, direct-mounted, metal case.
 - 2. Sealed, direct-mounted, plastic case.
- B. Pressure gage at outlet of humidifier shall be one of the following:
 - 1. Liquid-filled, direct-mounted, metal case.
 - 2. Sealed, direct-mounted, plastic case.

3.6 PRESSURE-GAGE SCALE-RANGE SCHEDULE

- A. Scale Range for Heating, Hot-Water and Steam Piping: 0 to 30 psi.

END OF SECTION 230519

SECTION 230523 - GENERAL-DUTY VALVES FOR HVAC PIPING

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section Includes:
 - 1. Bronze ball valves.
 - 2. Iron, single-flange butterfly valves.
- B. Related Sections:
 - 1. Section 230553 "Identification for HVAC Piping and Equipment" for valve tags and schedules.

1.3 DEFINITIONS

- A. CWP: Cold working pressure.
- B. EPDM: Ethylene propylene copolymer rubber.
- C. NBR: Acrylonitrile-butadiene, Buna-N, or nitrile rubber.
- D. NRS: Nonrising stem.
- E. RS: Rising stem.
- F. SWP: Steam working pressure.

1.4 ACTION SUBMITTALS

- A. Product Data: For each type of valve indicated.

1.5 QUALITY ASSURANCE

- A. Source Limitations for Valves: Obtain each type of valve from single source from single manufacturer.
- B. ASME Compliance:
 - 1. ASME B16.10 and ASME B16.34 for ferrous valve dimensions and design criteria.
 - 2. ASME B31.1 for power piping valves.
 - 3. ASME B31.9 for building services piping valves.

1.6 DELIVERY, STORAGE, AND HANDLING

- A. Prepare valves for shipping as follows:
 - 1. Protect internal parts against rust and corrosion.
 - 2. Protect threads, flange faces, grooves, and weld ends.
 - 3. Set ball valves open to minimize exposure of functional surfaces.
 - 4. Set butterfly valves closed or slightly open.
- B. Use the following precautions during storage:
 - 1. Maintain valve end protection.
 - 2. Store valves indoors and maintain at higher than ambient dew point temperature. If outdoor storage is necessary, store valves off the ground in watertight enclosures.
- C. Use sling to handle large valves; rig sling to avoid damage to exposed parts. Do not use stems as lifting or rigging points.

PART 2 - PRODUCTS

2.1 GENERAL REQUIREMENTS FOR VALVES

- A. Refer to HVAC valve schedule articles for applications of valves.
- B. Valve Pressure and Temperature Ratings: Not less than indicated and as required for system pressures and temperatures.
- C. Valve Sizes: Same as upstream piping unless otherwise indicated.
- D. Valve Actuator Types:
 - 1. Handlever: For quarter-turn valves NPS 6 and smaller.
- E. Valves in Insulated Piping: With 2-inch stem extensions and the following features:
 - 1. Ball Valves: With extended operating handle of non-thermal-conductive material, and protective sleeve that allows operation of valve without breaking the vapor seal or disturbing insulation.
 - 2. Butterfly Valves: With extended neck.
- F. Valve-End Connections:
 - 1. Flanged: With flanges according to ASME B16.1 for iron valves.
 - 2. Threaded: With threads according to ASME B1.20.1.

2.2 BRONZE BALL VALVES

- A. Two-Piece, Full-Port, Bronze Ball Valves with Stainless-Steel Trim:
 - 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Conbraco Industries, Inc.; Apollo Valves.
 - b. Crane Co.; Crane Valve Group; Crane Valves.
 - c. Hammond Valve.

- d. Milwaukee Valve Company.
- e. NIBCO INC.

2. Description:

- a. Standard: MSS SP-110.
- b. SWP Rating: 150 psig.
- c. CWP Rating: 600 psig.
- d. Body Design: Two piece.
- e. Body Material: Bronze.
- f. Ends: Threaded.
- g. Seats: PTFE or TFE.
- h. Stem: Stainless steel.
- i. Ball: Stainless steel, vented.
- j. Port: Full.

2.3 IRON, SINGLE-FLANGE BUTTERFLY VALVES

A. 150 CWP, Iron, Single-Flange Butterfly Valves with EPDM Seat and Ductile-Iron Disc:

1. Manufacturers: Subject to compliance with requirements, provide products by one of the following:

- a. Bray Controls; a division of Bray International.
- b. Conbraco Industries, Inc.; Apollo Valves.
- c. Cooper Cameron Valves; a division of Cooper Cameron Corp.
- d. Crane Co.; Crane Valve Group.
- e. DeZurik Water Controls.
- f. Hammond Valve.
- g. Kitz Corporation.
- h. Milwaukee Valve Company.
- i. Mueller Steam Specialty; a division of SPX Corporation.
- j. NIBCO INC.
- k. Watts Regulator Co.; a division of Watts Water Technologies, Inc.

2. Description:

- a. Standard: MSS SP-67, Type I.
- b. CWP Rating: 150 psig.
- c. Body Design: Lug type; suitable for bidirectional dead-end service at rated pressure without use of downstream flange.
- d. Body Material: ASTM A 126, cast iron or ASTM A 536, ductile iron.
- e. Seat: EPDM.
- f. Stem: One- or two-piece stainless steel.
- g. Disc: Nickel-plated or -coated ductile iron.

PART 3 - EXECUTION

3.1 EXAMINATION

- A. Examine valve interior for cleanliness, freedom from foreign matter, and corrosion. Remove special packing materials, such as blocks, used to prevent disc movement during shipping and handling.

- B. Operate valves in positions from fully open to fully closed. Examine guides and seats made accessible by such operations.
- C. Examine threads on valve and mating pipe for form and cleanliness.
- D. Examine mating flange faces for conditions that might cause leakage. Check bolting for proper size, length, and material. Verify that gasket is of proper size, that its material composition is suitable for service, and that it is free from defects and damage.
- E. Do not attempt to repair defective valves; replace with new valves.

3.2 VALVE INSTALLATION

- A. Install valves with unions or flanges at each piece of equipment arranged to allow service, maintenance, and equipment removal without system shutdown.
- B. Locate valves for easy access and provide separate support where necessary.
- C. Install valves in horizontal piping with stem at or above center of pipe.
- D. Install valves in position to allow full stem movement.

3.3 ADJUSTING

- A. Adjust or replace valve packing after piping systems have been tested and put into service but before final adjusting and balancing. Replace valves if persistent leaking occurs.

3.4 GENERAL REQUIREMENTS FOR VALVE APPLICATIONS

- A. If valve applications are not indicated, use the following:
 - 1. Shutoff Service: Ball or butterfly.
 - 2. Butterfly Valve Dead-End Service: Single-flange (lug) type.
 - 3. Throttling Service except Steam: ball, or butterfly valves.
- B. If valves with specified SWP classes or CWP ratings are not available, the same types of valves with higher SWP classes or CWP ratings may be substituted.
- C. Select valves, except wafer types, with the following end connections:
 - 1. For Copper Tubing, NPS 2 and Smaller: Threaded ends.
 - 2. For Steel Piping, NPS 2 and Smaller: Threaded ends.
 - 3. For Steel Piping, NPS 2-1/2 to NPS 4: Flanged end.

END OF SECTION 230523

SECTION 230529 - HANGERS AND SUPPORTS FOR HVAC PIPING AND EQUIPMENT

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section Includes:
 - 1. Metal pipe hangers and supports.
 - 2. Trapeze pipe hangers.
 - 3. Metal framing systems.
 - 4. Thermal-hanger shield inserts.
 - 5. Fastener systems.
 - 6. Equipment supports.

1.3 DEFINITIONS

- A. MSS: Manufacturers Standardization Society of The Valve and Fittings Industry Inc.

1.4 ACTION SUBMITTALS

- A. Product Data: For each type of product indicated.

1.5 QUALITY ASSURANCE

- A. Structural Steel Welding Qualifications: Qualify procedures and personnel according to AWS D1.1/D1.1M, "Structural Welding Code - Steel."
- B. Pipe Welding Qualifications: Qualify procedures and operators according to ASME Boiler and Pressure Vessel Code.

PART 2 - PRODUCTS

2.1 METAL PIPE HANGERS AND SUPPORTS

- A. Carbon-Steel Pipe Hangers and Supports:
 - 1. Description: MSS SP-58, Types 1 through 58, factory-fabricated components.
 - 2. Galvanized Metallic Coatings: Pregalvanized or hot dipped.
 - 3. Hanger Rods: Continuous-thread rod, nuts, and washer made of carbon steel.

2.2 TRAPEZE PIPE HANGERS

- A. Description: MSS SP-69, Type 59, shop- or field-fabricated pipe-support assembly made from structural carbon-steel shapes with MSS SP-58 carbon-steel hanger rods, nuts, saddles, and U-bolts.

2.3 METAL FRAMING SYSTEMS

- A. MFMA Manufacturer Metal Framing Systems:

1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Allied Tube & Conduit.
 - b. Cooper B-Line, Inc.
 - c. Thomas & Betts Corporation.
 - d. Unistrut Corporation; Tyco International, Ltd.
2. Description: Shop- or field-fabricated pipe-support assembly for supporting multiple parallel pipes.
3. Standard: MFMA-4.
4. Channels: Continuous slotted steel channel with inturned lips.
5. Channel Nuts: Formed or stamped steel nuts or other devices designed to fit into channel slot and, when tightened, prevent slipping along channel.
6. Hanger Rods: Continuous-thread rod, nuts, and washer made of carbon steel.
7. Metallic Coating: Hot-dipped galvanized.

2.4 THERMAL-HANGER SHIELD INSERTS

- A. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
1. ERICO International Corporation.
 2. National Pipe Hanger Corporation.
 3. PHS Industries, Inc.
 4. Pipe Shields, Inc.; a subsidiary of Piping Technology & Products, Inc.
 5. Rilco Manufacturing Co., Inc.
- B. Insulation-Insert Material for Cold Piping: ASTM C 591, Type VI, Grade 1 polyisocyanurate with 125-psig minimum compressive strength and vapor barrier.
- C. Insulation-Insert Material for Hot Piping: Water-repellent treated, ASTM C 533, Type I calcium silicate with 100-psig minimum compressive strength.
- D. For Trapeze or Clamped Systems: Insert and shield shall cover entire circumference of pipe.
- E. For Clevis or Band Hangers: Insert and shield shall cover lower 180 degrees of pipe.
- F. Insert Length: Extend 2 inches beyond sheet metal shield for piping operating below ambient air temperature.

2.5 FASTENER SYSTEMS

- A. Mechanical-Expansion Anchors: Insert-wedge-type, zinc-coated steel anchors, for use in hardened portland cement concrete; with pull-out, tension, and shear capacities appropriate for supported loads and building materials where used.

2.6 EQUIPMENT SUPPORTS

- A. Description: Welded, shop- or field-fabricated equipment support made from structural carbon-steel shapes.

2.7 MISCELLANEOUS MATERIALS

- A. Structural Steel: ASTM A 36/A 36M, carbon-steel plates, shapes, and bars; black and galvanized.
- B. Grout: ASTM C 1107, factory-mixed and -packaged, dry, hydraulic-cement, nonshrink and nonmetallic grout; suitable for interior and exterior applications.
 - 1. Properties: Nonstaining, noncorrosive, and nongaseous.
 - 2. Design Mix: 5000-psi, 28-day compressive strength.

PART 3 - EXECUTION

3.1 HANGER AND SUPPORT INSTALLATION

- A. Metal Pipe-Hanger Installation: Comply with MSS SP-69 and MSS SP-89. Install hangers, supports, clamps, and attachments as required to properly support piping from the building structure.
- B. Metal Trapeze Pipe-Hanger Installation: Comply with MSS SP-69 and MSS SP-89. Arrange for grouping of parallel runs of horizontal piping, and support together on field-fabricated trapeze pipe hangers.
 - 1. Pipes of Various Sizes: Support together and space trapezes for smallest pipe size or install intermediate supports for smaller diameter pipes as specified for individual pipe hangers.
 - 2. Field fabricate from ASTM A 36/A 36M, carbon-steel shapes selected for loads being supported. Weld steel according to AWS D1.1/D1.1M.
- C. Metal Framing System Installation: Arrange for grouping of parallel runs of piping, and support together on field-assembled metal framing systems.
- D. Thermal-Hanger Shield Installation: Install in pipe hanger or shield for insulated piping.
- E. Fastener System Installation:
 - 1. Install mechanical-expansion anchors in concrete after concrete is placed and completely cured. Install fasteners according to manufacturer's written instructions.
- F. Install hangers and supports complete with necessary attachments, inserts, bolts, rods, nuts, washers, and other accessories.
- G. Equipment Support Installation: Fabricate from welded-structural-steel shapes.

- H. Install hangers and supports to allow controlled thermal and seismic movement of piping systems, to permit freedom of movement between pipe anchors, and to facilitate action of expansion joints, expansion loops, expansion bends, and similar units.
- I. Install lateral bracing with pipe hangers and supports to prevent swaying.
- J. Install building attachments within concrete slabs or attach to structural steel. Install additional attachments at concentrated loads, including valves, flanges, and strainers, NPS 2-1/2 and larger and at changes in direction of piping. Install concrete inserts before concrete is placed; fasten inserts to forms and install reinforcing bars through openings at top of inserts.
- K. Load Distribution: Install hangers and supports so that piping live and dead loads and stresses from movement will not be transmitted to connected equipment.
- L. Pipe Slopes: Install hangers and supports to provide indicated pipe slopes and to not exceed maximum pipe deflections allowed by ASME B31.9 for building services piping.
- M. Insulated Piping:

- 1. Attach clamps and spacers to piping.
 - a. Piping Operating above Ambient Air Temperature: Clamp may project through insulation.
 - b. Piping Operating below Ambient Air Temperature: Use thermal-hanger shield insert with clamp sized to match OD of insert.
 - c. Do not exceed pipe stress limits allowed by ASME B31.9 for building services piping.
- 2. Install MSS SP-58, Type 39, protection saddles if insulation without vapor barrier is indicated. Fill interior voids with insulation that matches adjoining insulation.
 - a. Option: Thermal-hanger shield inserts may be used. Include steel weight-distribution plate for pipe NPS 4 and larger if pipe is installed on rollers.
- 3. Install MSS SP-58, Type 40, protective shields on cold piping with vapor barrier. Shields shall span an arc of 180 degrees.
 - a. Option: Thermal-hanger shield inserts may be used. Include steel weight-distribution plate for pipe NPS 4 and larger if pipe is installed on rollers.
- 4. Shield Dimensions for Pipe: Not less than the following:
 - a. NPS 1/4 to NPS 3-1/2: 12 inches long and 0.048 inch thick.
- 5. Thermal-Hanger Shields: Install with insulation same thickness as piping insulation.

3.2 EQUIPMENT SUPPORTS

- A. Fabricate structural-steel stands to suspend equipment from structure overhead or to support equipment above floor.
- B. Grouting: Place grout under supports for equipment and make bearing surface smooth.
- C. Provide lateral bracing, to prevent swaying, for equipment supports.

3.3 METAL FABRICATIONS

- A. Cut, drill, and fit miscellaneous metal fabrications for trapeze pipe hangers.
- B. Fit exposed connections together to form hairline joints. Field weld connections that cannot be shop welded because of shipping size limitations.
- C. Field Welding: Comply with AWS D1.1/D1.1M procedures for shielded, metal arc welding; appearance and quality of welds; and methods used in correcting welding work; and with the following:
 - 1. Use materials and methods that minimize distortion and develop strength and corrosion resistance of base metals.
 - 2. Obtain fusion without undercut or overlap.
 - 3. Remove welding flux immediately.
 - 4. Finish welds at exposed connections so no roughness shows after finishing and so contours of welded surfaces match adjacent contours.

3.4 ADJUSTING

- A. Hanger Adjustments: Adjust hangers to distribute loads equally on attachments and to achieve indicated slope of pipe.
- B. Trim excess length of continuous-thread hanger and support rods to 1-1/2 inches.

3.5 PAINTING

- A. Touchup: Clean field welds and abraded areas of shop paint. Paint exposed areas immediately after erecting hangers and supports. Use same materials as used for shop painting. Comply with SSPC-PA 1 requirements for touching up field-painted surfaces.
 - 1. Apply paint by brush or spray to provide a minimum dry film thickness of 2.0 mils.
- B. Touchup: Cleaning and touchup painting of field welds, bolted connections, and abraded areas of shop paint on miscellaneous metal are specified in Section 099113 "Exterior Painting"
- C. Galvanized Surfaces: Clean welds, bolted connections, and abraded areas and apply galvanizing-repair paint to comply with ASTM A 780.

3.6 HANGER AND SUPPORT SCHEDULE

- A. Specific hanger and support requirements are in Sections specifying piping systems and equipment.
- B. Comply with MSS SP-69 for pipe-hanger selections and applications that are not specified in piping system Sections.
- C. Use nonmetallic coatings on attachments for electrolytic protection where attachments are in direct contact with copper tubing.
- D. Use carbon-steel and attachments for general service applications.
- E. Use thermal-hanger shield inserts for insulated piping and tubing.
- F. Horizontal-Piping Hangers and Supports: Unless otherwise indicated and except as specified in piping system Sections, install the following types:

1. Adjustable, Steel Clevis Hangers (MSS Type 1): For suspension of noninsulated or insulated, stationary pipes NPS 1/2 to NPS 30.
 2. Pipe Stanchion Saddles (MSS Type 37): For support of pipes NPS 4 to NPS 36, with steel-pipe base stanchion support and cast-iron floor flange or carbon-steel plate, and with U-bolt to retain pipe.
 3. Single-Pipe Rolls (MSS Type 41): For suspension of pipes NPS 1 to NPS 30, from two rods if longitudinal movement caused by expansion and contraction might occur.
 4. Adjustable Roller Hangers (MSS Type 43): For suspension of pipes NPS 2-1/2 to NPS 24, from single rod if horizontal movement caused by expansion and contraction might occur.
- G. Vertical-Piping Clamps: Unless otherwise indicated and except as specified in piping system Sections, install the following types:
1. Extension Pipe or Riser Clamps (MSS Type 8): For support of pipe risers NPS 3/4 to NPS 24.
 2. Carbon- or Alloy-Steel Riser Clamps (MSS Type 42): For support of pipe risers NPS 3/4 to NPS 24 if longer ends are required for riser clamps.
- H. Building Attachments: Unless otherwise indicated and except as specified in piping system Sections, install the following types:
1. Top-Beam C-Clamps (MSS Type 19): For use under roof installations with bar-joist construction, to attach to top flange of structural shape.
 2. C-Clamps (MSS Type 23): For structural shapes.
 3. Welded-Steel Brackets: For support of pipes from below or for suspending from above by using clip and rod. Use one of the following for indicated loads:
 - a. Light (MSS Type 31): 750 lb.
- I. Saddles and Shields: Unless otherwise indicated and except as specified in piping system Sections, install the following types:
1. Steel-Pipe-Covering Protection Saddles (MSS Type 39): To fill interior voids with insulation that matches adjoining insulation.
 2. Protection Shields (MSS Type 40): Of length recommended in writing by manufacturer to prevent crushing insulation.
 3. Thermal-Hanger Shield Inserts: For supporting insulated pipe.
- J. Comply with MSS SP-69 for trapeze pipe-hanger selections and applications that are not specified in piping system Sections.
- K. Comply with MFMA-103 for metal framing system selections and applications that are not specified in piping system Sections.
- L. Use mechanical-expansion anchors instead of building attachments where required in concrete construction.

END OF SECTION 230529

SECTION 230553 - IDENTIFICATION FOR HVAC PIPING AND EQUIPMENT

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section Includes:
 - 1. Equipment labels.
 - 2. Pipe labels.
 - 3. Valve tags.

1.3 ACTION SUBMITTALS

- A. Product Data: For each type of product indicated.
- B. Samples: For color, letter style, and graphic representation required for each identification material and device.
- C. Equipment Label Schedule: Include a listing of all equipment to be labeled with the proposed content for each label.
- D. Valve numbering scheme.
- E. Valve Schedules: For each piping system to include in maintenance manuals.

1.4 COORDINATION

- A. Coordinate installation of identifying devices with completion of covering and painting of surfaces where devices are to be applied.
- B. Coordinate installation of identifying devices with locations of access panels and doors.
- C. Install identifying devices before installing acoustical ceilings and similar concealment.

PART 2 - PRODUCTS

2.1 EQUIPMENT LABELS

- A. Plastic Labels for Equipment:

1. Material and Thickness: Multilayer, multicolor, plastic labels for mechanical engraving, 1/8 inch thick, and having predrilled holes for attachment hardware.
 2. Letter Color: White.
 3. Background Color: Black.
 4. Maximum Temperature: Able to withstand temperatures up to 160 deg F.
 5. Minimum Label Size: Length and width vary for required label content, but not less than 2-1/2 by 3/4 inch.
 6. Minimum Letter Size: 1/4 inch for name of units if viewing distance is less than 24 inches, 1/2 inch for viewing distances up to 72 inches, and proportionately larger lettering for greater viewing distances. Include secondary lettering two-thirds to three-fourths the size of principal lettering.
 7. Fasteners: Stainless-steel rivets or self-tapping screws.
 8. Adhesive: Contact-type permanent adhesive, compatible with label and with substrate.
- B. Label Content: Include equipment's Drawing designation or unique equipment number, Drawing numbers where equipment is indicated (plans, details, and schedules), plus the Specification Section number and title where equipment is specified.
- C. Equipment Label Schedule: For each item of equipment to be labeled, on 8-1/2-by-11-inch bond paper. Tabulate equipment identification number and identify Drawing numbers where equipment is indicated (plans, details, and schedules), plus the Specification Section number and title where equipment is specified. Equipment schedule shall be included in operation and maintenance data.

2.2 PIPE LABELS

- A. General Requirements for Manufactured Pipe Labels: Preprinted, color-coded, with lettering indicating service, and showing flow direction.
- B. Pretensioned Pipe Labels: Precoiled, semirigid plastic formed to partially cover circumference of pipe and to attach to pipe without fasteners or adhesive.
- C. Self-Adhesive Pipe Labels: Printed plastic with contact-type, permanent-adhesive backing.
- D. Pipe Label Contents: Include identification of piping service using same designations or abbreviations as used on Drawings, pipe size, and an arrow indicating flow direction.
1. Flow-Direction Arrows: Integral with piping system service lettering to accommodate both directions, or as separate unit on each pipe label to indicate flow direction.
 2. Lettering Size: At least 1-1/2 inches.

2.3 VALVE TAGS

- A. Valve Tags: Stamped or engraved with 1/4-inch letters for piping system abbreviation and 1/2-inch numbers.
1. Tag Material: Brass, 0.032-inch minimum thickness, and having predrilled or stamped holes for attachment hardware.
 2. Fasteners: Brass wire-link or beaded chain; or S-hook.

PART 3 - EXECUTION

3.1 PREPARATION

- A. Clean piping and equipment surfaces of substances that could impair bond of identification devices, including dirt, oil, grease, release agents, and incompatible primers, paints, and encapsulants.

3.2 EQUIPMENT LABEL INSTALLATION

- A. Install or permanently fasten labels on each major item of mechanical equipment.
- B. Locate equipment labels where accessible and visible.

3.3 PIPE LABEL INSTALLATION

- A. Locate pipe labels where piping is exposed or above accessible ceilings in finished spaces; machine rooms; accessible maintenance spaces such as shafts, tunnels, and plenums; and exterior exposed locations as follows:
 - 1. Near each valve and control device.
 - 2. Where flow pattern is not obvious, mark each pipe at branch.
 - 3. Near penetrations through walls, floors, ceilings, and inaccessible enclosures.
 - 4. Near major equipment items and other points of origination and termination.
 - 5. Spaced at maximum intervals of 25 feet along each run. Reduce intervals to 15 feet in areas of congested piping and equipment.
- B. Pipe Label Color Schedule:
 - 1. Heating Water Piping:
 - a. Background Color: Yellow.
 - b. Letter Color: Black.

3.4 VALVE-TAG INSTALLATION

- A. Install tags on valves and control devices in piping systems.
- B. Valve-Tag Application Schedule: Tag valves according to size, shape, and color scheme and with captions similar to those indicated in the following subparagraphs:
 - 1. Valve-Tag Shape:
 - a. Hot Water: Rectangular.
 - 2. Valve-Tag Color:
 - a. Hot Water: White.
 - 3. Letter Color:
 - a. Hot Water: Black.

END OF SECTION 230553

SECTION 230593 - TESTING, ADJUSTING, AND BALANCING FOR HVAC

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section Includes:
 - 1. Balancing Hydronic Piping Systems:
 - a. Constant-flow hydronic systems.

1.3 DEFINITIONS

- A. AABC: Associated Air Balance Council.
- B. NEBB: National Environmental Balancing Bureau.
- C. TAB: Testing, adjusting, and balancing.
- D. TABB: Testing, Adjusting, and Balancing Bureau.
- E. TAB Specialist: An entity engaged to perform TAB Work.

1.4 INFORMATIONAL SUBMITTALS

- A. Qualification Data: Within 30 days of Contractor's Notice to Proceed, submit documentation that the TAB contractor and this Project's TAB team members meet the qualifications specified in "Quality Assurance" Article.
- B. Strategies and Procedures Plan: Within 60 days of Contractor's Notice to Proceed, submit TAB strategies and step-by-step procedures as specified in "Preparation" Article.
- C. Certified TAB reports.
- D. Instrument calibration reports, to include the following:
 - 1. Instrument type and make.
 - 2. Serial number.
 - 3. Application.
 - 4. Dates of use.
 - 5. Dates of calibration.

1.5 QUALITY ASSURANCE

- A. TAB Contractor Qualifications: Engage a TAB entity certified by AABC NEBB or TABB.
 - 1. TAB Field Supervisor: Employee of the TAB contractor and certified by AABC NEBB or TABB.
 - 2. TAB Technician: Employee of the TAB contractor and who is certified by AABC NEBB or TABB as a TAB technician.
- B. Certify TAB field data reports and perform the following:
 - 1. Review field data reports to validate accuracy of data and to prepare certified TAB reports.
 - 2. Certify that the TAB team complied with the approved TAB plan and the procedures specified and referenced in this Specification.
- C. TAB Report Forms: Use standard TAB contractor's forms approved by Architect.
- D. Instrumentation Type, Quantity, Accuracy, and Calibration: As described in ASHRAE 111, Section 5, "Instrumentation."
- E. ASHRAE Compliance: Applicable requirements in ASHRAE 62.1, Section 7.2.2 - "Air Balancing."
- F. ASHRAE/IESNA Compliance: Applicable requirements in ASHRAE/IESNA 90.1, Section 6.7.2.3 - "System Balancing."

1.6 PROJECT CONDITIONS

- A. Full Owner Occupancy: Owner will occupy the site and existing building during entire TAB period. Cooperate with Owner during TAB operations to minimize conflicts with Owner's operations.

1.7 COORDINATION

- A. Notice: Provide seven days' advance notice for each test. Include scheduled test dates and times.
- B. Perform TAB after leakage and pressure tests on water distribution systems have been satisfactorily completed.

PART 2 - PRODUCTS (Not Applicable)

PART 3 - EXECUTION

3.1 EXAMINATION

- A. Examine the Contract Documents to become familiar with Project requirements and to discover conditions in systems' designs that may preclude proper TAB of systems and equipment.
- B. Examine systems for installed balancing devices, such as test ports, gage cocks, thermometer wells, flow-control devices, balancing valves and fittings. Verify that locations of these balancing devices are accessible.
- C. Examine the approved submittals for HVAC systems and equipment.

- D. Examine design data including HVAC system descriptions, statements of design assumptions for environmental conditions and systems' output, and statements of philosophies and assumptions about HVAC system and equipment controls.
- E. Verify that penetrations in plenum walls are sealed and fire-stopped if required.
- F. Examine system and equipment installations and verify that field quality-control testing, cleaning, and adjusting specified in individual Sections have been performed.
- G. Examine test reports specified in individual system and equipment Sections.
- H. Examine strainers. Verify that startup screens are replaced by permanent screens with indicated perforations.
- I. Examine operating safety interlocks and controls on HVAC equipment.
- J. Report deficiencies discovered before and during performance of TAB procedures. Observe and record system reactions to changes in conditions. Record default set points if different from indicated values.

3.2 PREPARATION

- A. Prepare a TAB plan that includes strategies and step-by-step procedures.
- B. Complete system-readiness checks and prepare reports. Verify the following:
 - 1. Permanent electrical-power wiring is complete.
 - 2. Hydronic systems are filled, clean, and free of air.
 - 3. Automatic temperature-control systems are operational.
 - 4. Isolating and balancing valves are open and control valves are operational.

3.3 GENERAL PROCEDURES FOR TESTING AND BALANCING

- A. Perform testing and balancing procedures on each system according to the procedures contained in AABC's "National Standards for Total System Balance" ASHRAE 111 NEBB's "Procedural Standards for Testing, Adjusting, and Balancing of Environmental Systems" or SMACNA's "HVAC Systems - Testing, Adjusting, and Balancing" and in this Section.
- B. Cut insulation, pipes, and equipment cabinets for installation of test probes to the minimum extent necessary for TAB procedures.
 - 1. Install and join new insulation that matches removed materials. Restore insulation, coverings, vapor barrier, and finish according to 230719 "HVAC Piping Insulation."
- C. Mark equipment and balancing devices, including valve position indicators, and similar controls and devices, with paint or other suitable, permanent identification material to show final settings.
- D. Take and report testing and balancing measurements in inch-pound (IP) units.

3.4 GENERAL PROCEDURES FOR HYDRONIC SYSTEMS

- A. Prepare test reports with pertinent design data, and number in sequence starting at pump to end of system. Check the sum of branch-circuit flows against the approved pump flow rate. Correct variations that exceed plus or minus 5 percent.

- B. Prepare schematic diagrams of systems' "as-built" piping layouts.
- C. Prepare hydronic systems for testing and balancing according to the following, in addition to the general preparation procedures specified above:
 - 1. Open all manual valves for maximum flow.
 - 2. Check liquid level in expansion tank.
 - 3. Check makeup water-station pressure gage for adequate pressure for highest vent.
 - 4. Check flow-control valves for specified sequence of operation, and set at indicated flow.
 - 5. Check air vents for a forceful liquid flow exiting from vents when manually operated.

3.5 PROCEDURES FOR CONSTANT-FLOW HYDRONIC SYSTEMS

- A. Measure flow at all automatic flow control valves to verify that valves are functioning as designed.
- B. Measure flow at all pressure-independent characterized control valves, with valves in fully open position, to verify that valves are functioning as designed.
- C. Set calibrated balancing valves, if installed, at calculated presettings.
- D. Check settings and operation of each safety valve. Record settings.

3.6 PROCEDURES FOR BOILERS

- A. Hydronic Boilers: Measure and record entering- and leaving-water temperatures and water flow.

3.7 TOLERANCES

- A. Set HVAC system's air flow rates and water flow rates within the following tolerances:
 - 1. Heating-Water Flow Rate: Plus or minus 10 percent.

3.8 REPORTING

- A. Initial Construction-Phase Report: Based on examination of the Contract Documents as specified in "Examination" Article, prepare a report on the adequacy of design for systems' balancing devices. Recommend changes and additions to systems' balancing devices to facilitate proper performance measuring and balancing. Recommend changes and additions to HVAC systems and general construction to allow access for performance measuring and balancing devices.

3.9 FINAL REPORT

- A. General: Prepare a certified written report; tabulate and divide the report into separate sections for tested systems and balanced systems.
 - 1. Include a certification sheet at the front of the report's binder, signed and sealed by the certified testing and balancing engineer.
 - 2. Include a list of instruments used for procedures, along with proof of calibration.
- B. Final Report Contents: In addition to certified field-report data, include the following:
 - 1. Manufacturers' test data.

2. Field test reports prepared by system and equipment installers.
3. Other information relative to equipment performance; do not include Shop Drawings and product data.

C. General Report Data: In addition to form titles and entries, include the following data:

1. Title page.
2. Name and address of the TAB contractor.
3. Project name.
4. Project location.
5. Architect's name and address.
6. Engineer's name and address.
7. Contractor's name and address.
8. Report date.
9. Signature of TAB supervisor who certifies the report.
10. Table of Contents with the total number of pages defined for each section of the report. Number each page in the report.
11. Summary of contents including the following:
 - a. Indicated versus final performance.
 - b. Notable characteristics of systems.
 - c. Description of system operation sequence if it varies from the Contract Documents.
12. Nomenclature sheets for each item of equipment.
13. Notes to explain why certain final data in the body of reports vary from indicated values.
14. Test conditions for fans and pump performance forms including the following:

D. System Diagrams: Include schematic layouts of air and hydronic distribution systems. Present each system with single-line diagram and include the following:

1. Water and steam flow rates.
2. Pipe and valve sizes and locations.
3. Balancing stations.
4. Position of balancing devices.

E. Instrument Calibration Reports:

1. Report Data:
 - a. Instrument type and make.
 - b. Serial number.
 - c. Application.
 - d. Dates of use.
 - e. Dates of calibration.

END OF SECTION 230593

SECTION 230719 - HVAC PIPING INSULATION

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section includes insulating the following HVAC piping systems:
 - 1. Heating hot-water piping, indoors.

1.3 ACTION SUBMITTALS

- A. Product Data: For each type of product indicated. Include thermal conductivity, water-vapor permeance thickness, and jackets (both factory and field applied if any).

1.4 QUALITY ASSURANCE

- A. Installer Qualifications: Skilled mechanics who have successfully completed an apprenticeship program or another craft training program certified by the Department of Labor, Bureau of Apprenticeship and Training.
- B. Surface-Burning Characteristics: For insulation and related materials, as determined by testing identical products according to ASTM E 84, by a testing and inspecting agency acceptable to authorities having jurisdiction. Factory label insulation and jacket materials and adhesive, mastic, tapes, and cement material containers, with appropriate markings of applicable testing agency.
 - 1. Insulation Installed Indoors: Flame-spread index of 25 or less, and smoke-developed index of 50 or less.

1.5 DELIVERY, STORAGE, AND HANDLING

- A. Packaging: Insulation material containers shall be marked by manufacturer with appropriate ASTM standard designation, type and grade, and maximum use temperature.

1.6 COORDINATION

- A. Coordinate sizes and locations of supports, hangers, and insulation shields specified in Section 230529 "Hangers and Supports for HVAC Piping and Equipment."
- B. Coordinate clearance requirements with piping Installer for piping insulation application. Before preparing piping Shop Drawings, establish and maintain clearance requirements for installation of insulation and field-applied jackets and finishes and for space required for maintenance.

1.7 SCHEDULING

- A. Schedule insulation application after pressure testing systems and, where required, after installing and testing heat tracing. Insulation application may begin on segments that have satisfactory test results.
- B. Complete installation and concealment of plastic materials as rapidly as possible in each area of construction.

PART 2 - PRODUCTS

2.1 INSULATION MATERIALS

- A. Comply with requirements in "Piping Insulation Schedule, General," "Indoor Piping Insulation Schedule," articles for where insulating materials shall be applied.
- B. Products shall not contain asbestos, lead, mercury, or mercury compounds.
- C. Products that come in contact with stainless steel shall have a leachable chloride content of less than 50 ppm when tested according to ASTM C 871.
- D. Foam insulation materials shall not use CFC or HCFC blowing agents in the manufacturing process.
- E. Mineral-Fiber, Preformed Pipe Insulation:
 - 1. Products: Subject to compliance with requirements, available products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Fibrex Insulations Inc.; Coreplus 1200.
 - b. Johns Manville; Micro-Lok.
 - c. Knauf Insulation; 1000-Degree Pipe Insulation.
 - d. Manson Insulation Inc.; Alley-K.
 - e. Owens Corning; Fiberglas Pipe Insulation.
 - 2. Type I, 850 deg F Materials: Mineral or glass fibers bonded with a thermosetting resin. Comply with ASTM C 547, Type I, Grade A, with factory-applied ASJ. Factory-applied jacket requirements are specified in "Factory-Applied Jackets" Article.

2.2 INSULATING CEMENTS

- A. Mineral-Fiber Insulating Cement: Comply with ASTM C 195.
 - 1. Products: Subject to compliance with requirements, available products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Ramco Insulation, Inc.; Super-Stik.
- B. Mineral-Fiber, Hydraulic-Setting Insulating and Finishing Cement: Comply with ASTM C 449.
 - 1. Products: Subject to compliance with requirements, available products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Ramco Insulation, Inc.; Ramcote 1200 and Quik-Cote.

2.3 ADHESIVES

- A. Materials shall be compatible with insulation materials, jackets, and substrates and for bonding insulation to itself and to surfaces to be insulated unless otherwise indicated.
- B. Mineral-Fiber Adhesive: Comply with MIL-A-3316C, Class 2, Grade A.
 - 1. Products: Subject to compliance with requirements, available products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Childers Brand, Specialty Construction Brands, Inc., a business of H. B. Fuller Company; CP-127.
 - b. Eagle Bridges - Marathon Industries; 225.
 - c. Foster Brand, Specialty Construction Brands, Inc., a business of H. B. Fuller Company; 85-60/85-70.
 - d. Mon-Eco Industries, Inc.; 22-25.
 - 2. For indoor applications, adhesive shall have a VOC content of 80 g/L or less when calculated according to 40 CFR 59, Subpart D (EPA Method 24).
 - 3. Adhesive shall comply with the testing and product requirements of the California Department of Health Services' "Standard Practice for the Testing of Volatile Organic Emissions from Various Sources Using Small-Scale Environmental Chambers."
- C. ASJ Adhesive, and FSK and PVDC Jacket Adhesive: Comply with MIL-A-3316C, Class 2, Grade A for bonding insulation jacket lap seams and joints.
 - 1. Products: Subject to compliance with requirements, available products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Childers Brand, Specialty Construction Brands, Inc., a business of H. B. Fuller Company; CP-82.
 - b. Eagle Bridges - Marathon Industries; 225.
 - c. Foster Brand, Specialty Construction Brands, Inc., a business of H. B. Fuller Company; 85-50.
 - d. Mon-Eco Industries, Inc.; 22-25.
 - 2. For indoor applications, adhesive shall have a VOC content of 50 g/L or less when calculated according to 40 CFR 59, Subpart D (EPA Method 24).
 - 3. Adhesive shall comply with the testing and product requirements of the California Department of Health Services' "Standard Practice for the Testing of Volatile Organic Emissions from Various Sources Using Small-Scale Environmental Chambers."

2.4 MASTICS

- A. Materials shall be compatible with insulation materials, jackets, and substrates; comply with MIL-PRF-19565C, Type II.
 - 1. For indoor applications, use mastics that have a VOC content of 50 g/L or less when calculated according to 40 CFR 59, Subpart D (EPA Method 24).

2.5 SEALANTS

- A. ASJ Flashing Sealants, and Vinyl, PVDC, and PVC Jacket Flashing Sealants:

1. Products: Subject to compliance with requirements, available products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Childers Brand, Specialty Construction Brands, Inc., a business of H. B. Fuller Company; CP-76.
2. Materials shall be compatible with insulation materials, jackets, and substrates.
3. Service Temperature Range: Minus 40 to plus 250 deg F.
4. Color: White.
5. For indoor applications, sealants shall have a VOC content of 420 g/L or less when calculated according to 40 CFR 59, Subpart D (EPA Method 24).
6. Sealants shall comply with the testing and product requirements of the California Department of Health Services' "Standard Practice for the Testing of Volatile Organic Emissions from Various Sources Using Small-Scale Environmental Chambers."

2.6 FACTORY-APPLIED JACKETS

- A. Insulation system schedules indicate factory-applied jackets on various applications. When factory-applied jackets are indicated, comply with the following:
- B. ASJ: White, kraft-paper, fiberglass-reinforced scrim with aluminum-foil backing; complying with ASTM C 1136, Type I

2.7 FIELD-APPLIED JACKETS

- A. PVC Jacket: High-impact-resistant, UV-resistant PVC complying with ASTM D 1784, Class 16354-C; thickness as scheduled; roll stock ready for shop or field cutting and forming. Thickness is indicated in field-applied jacket schedules.
 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to the following:
 - a. Johns Manville; a Berkshire Hathaway company.
 - b. P.I.C. Plastics, Inc.
 - c. Proto Corporation.
 2. Adhesive: As recommended by jacket material manufacturer.
 3. Color: White.
 4. Factory-fabricated fitting covers to match jacket if available; otherwise, field fabricate.
 - a. Shapes: 45- and 90-degree, short- and long-radius elbows, tees, valves, flanges, unions, reducers and end caps.

2.8 TAPES

- A. ASJ Tape: White vapor-retarder tape matching factory-applied jacket with acrylic adhesive, complying with ASTM C 1136.
 1. Products: Subject to compliance with requirements, available products that may be incorporated into the Work include, but are not limited to, the following:
 - a. ABI, Ideal Tape Division; 428 AWF ASJ.

- b. Avery Dennison Corporation, Specialty Tapes Division; Fasson 0836.
 - c. Compac Corporation; 104 and 105.
 - d. Venture Tape; 1540 CW Plus, 1542 CW Plus, and 1542 CW Plus/SQ.
- 2. Width: 3 inches.
 - 3. Thickness: 11.5 mils.
 - 4. Adhesion: 90 ounces force/inch in width.
 - 5. Elongation: 2 percent.
 - 6. Tensile Strength: 40 lbf/inch in width.
 - 7. ASJ Tape Disks and Squares: Precut disks or squares of ASJ tape.

2.9 SECUREMENTS

- A. Staples: Outward-clinching insulation staples, nominal 3/4-inch- wide, stainless steel or Monel.

PART 3 - EXECUTION

3.1 EXAMINATION

- A. Examine substrates and conditions for compliance with requirements for installation tolerances and other conditions affecting performance of insulation application.
 - 1. Verify that systems to be insulated have been tested and are free of defects.
 - 2. Verify that surfaces to be insulated are clean and dry.
 - 3. Proceed with installation only after unsatisfactory conditions have been corrected.

3.2 PREPARATION

- A. Surface Preparation: Clean and dry surfaces to receive insulation. Remove materials that will adversely affect insulation application.
- B. Surface Preparation: Clean and prepare surfaces to be insulated. Before insulating, apply a corrosion coating to insulated surfaces as follows:
 - 1. Carbon Steel: Coat carbon steel operating at a service temperature between 32 and 300 deg F with an epoxy coating. Consult coating manufacturer for appropriate coating materials and application methods for operating temperature range.
- C. Mix insulating cements with clean potable water; if insulating cements are to be in contact with stainless-steel surfaces, use demineralized water.

3.3 GENERAL INSTALLATION REQUIREMENTS

- A. Install insulation materials, accessories, and finishes with smooth, straight, and even surfaces; free of voids throughout the length of piping including fittings, valves, and specialties.
- B. Install insulation materials, forms, vapor barriers or retarders, jackets, and thicknesses required for each item of pipe system as specified in insulation system schedules.
- C. Install accessories compatible with insulation materials and suitable for the service. Install accessories that do not corrode, soften, or otherwise attack insulation or jacket in either wet or dry state.

- D. Install insulation with longitudinal seams at top and bottom of horizontal runs.
- E. Install multiple layers of insulation with longitudinal and end seams staggered.
- F. Do not weld brackets, clips, or other attachment devices to piping, fittings, and specialties.
- G. Keep insulation materials dry during application and finishing.
- H. Install insulation with tight longitudinal seams and end joints. Bond seams and joints with adhesive recommended by insulation material manufacturer.
- I. Install insulation with least number of joints practical.
- J. Apply adhesives, mastics, and sealants at manufacturer's recommended coverage rate and wet and dry film thicknesses.
- K. Install insulation with factory-applied jackets as follows:
 - 1. Draw jacket tight and smooth.
 - 2. Cover circumferential joints with 3-inch- wide strips, of same material as insulation jacket. Secure strips with adhesive and outward clinching staples along both edges of strip, spaced 4 inches o.c.
 - 3. Overlap jacket longitudinal seams at least 1-1/2 inches. Install insulation with longitudinal seams at bottom of pipe. Clean and dry surface to receive self-sealing lap. Staple laps with outward clinching staples along edge at 2 inches o.c.
 - 4. Cover joints and seams with tape, according to insulation material manufacturer's written instructions, to maintain vapor seal.
 - 5. Where vapor barriers are indicated, apply vapor-barrier mastic on seams and joints and at ends adjacent to pipe flanges and fittings.
- L. Cut insulation in a manner to avoid compressing insulation more than 75 percent of its nominal thickness.
- M. Finish installation with systems at operating conditions. Repair joint separations and cracking due to thermal movement.
- N. Repair damaged insulation facings by applying same facing material over damaged areas. Extend patches at least 4 inches beyond damaged areas. Adhere, staple, and seal patches similar to butt joints.
- O. For above-ambient services, do not install insulation to the following:
 - 1. Vibration-control devices.
 - 2. Testing agency labels and stamps.
 - 3. Nameplates and data plates.
 - 4. Manholes.
 - 5. Handholes.
 - 6. Cleanouts.

3.4 GENERAL PIPE INSULATION INSTALLATION

- A. Requirements in this article generally apply to all insulation materials except where more specific requirements are specified in various pipe insulation material installation articles.
- B. Insulation Installation on Fittings, Valves, Strainers, Flanges, and Unions:

1. Install insulation over fittings, valves, strainers, flanges, unions, and other specialties with continuous thermal and vapor-retarder integrity unless otherwise indicated.
 2. Insulate pipe elbows using preformed fitting insulation or mitered fittings made from same material and density as adjacent pipe insulation. Each piece shall be butted tightly against adjoining piece and bonded with adhesive. Fill joints, seams, voids, and irregular surfaces with insulating cement finished to a smooth, hard, and uniform contour that is uniform with adjoining pipe insulation.
 3. Insulate tee fittings with preformed fitting insulation or sectional pipe insulation of same material and thickness as used for adjacent pipe. Cut sectional pipe insulation to fit. Butt each section closely to the next and hold in place with tie wire. Bond pieces with adhesive.
 4. Insulate valves using preformed fitting insulation or sectional pipe insulation of same material, density, and thickness as used for adjacent pipe. Overlap adjoining pipe insulation by not less than two times the thickness of pipe insulation, or one pipe diameter, whichever is thicker. For valves, insulate up to and including the bonnets, valve stuffing-box studs, bolts, and nuts. Fill joints, seams, and irregular surfaces with insulating cement.
 5. Insulate strainers using preformed fitting insulation or sectional pipe insulation of same material, density, and thickness as used for adjacent pipe. Overlap adjoining pipe insulation by not less than two times the thickness of pipe insulation, or one pipe diameter, whichever is thicker. Fill joints, seams, and irregular surfaces with insulating cement. Insulate strainers so strainer basket flange or plug can be easily removed and replaced without damaging the insulation and jacket. Provide a removable reusable insulation cover. Insulate flanges and unions using a section of oversized preformed pipe insulation. Overlap adjoining pipe insulation by not less than two times the thickness of pipe insulation, or one pipe diameter, whichever is thicker.
 6. Cover segmented insulated surfaces with a layer of finishing cement and coat with a mastic. Install breather mastic for above-ambient services. Reinforce the mastic with fabric-reinforcing mesh. Trowel the mastic to a smooth and well-shaped contour.
 7. For services not specified to receive a field-applied jacket, install fitted PVC cover over elbows, tees, strainers, valves, flanges, and unions. Terminate ends with PVC end caps. Tape PVC covers to adjoining insulation facing using PVC tape.
 8. Stencil or label the outside insulation jacket of each union with the word "union." Match size and color of pipe labels.
- C. Insulate instrument connections for thermometers, pressure gages, pressure temperature taps, test connections, flow meters, sensors, switches, and transmitters on insulated pipes. Shape insulation at these connections by tapering it to and around the connection with insulating cement and finish with finishing cement, mastic, and flashing sealant.
- D. Install removable insulation covers at locations indicated. Installation shall conform to the following:
1. Make removable flange and union insulation from sectional pipe insulation of same thickness as that on adjoining pipe. Install same insulation jacket as adjoining pipe insulation.
 2. When flange and union covers are made from sectional pipe insulation, extend insulation from flanges or union long at least two times the insulation thickness over adjacent pipe insulation on each side of flange or union. Secure flange cover in place with stainless-steel or aluminum bands. Select band material compatible with insulation and jacket.
 3. Construct removable valve insulation covers in same manner as for flanges, except divide the two-part section on the vertical center line of valve body.
 4. When covers are made from block insulation, make two halves, each consisting of mitered blocks wired to stainless-steel fabric. Secure this wire frame, with its attached insulation, to flanges with tie wire. Extend insulation at least 2 inches over adjacent pipe insulation on each side of valve. Fill space between flange or union cover and pipe insulation with insulating cement. Finish cover assembly with insulating cement applied in two coats. After first coat is dry, apply and trowel second coat to a smooth finish.
 5. Unless a PVC jacket is indicated in field-applied jacket schedules, finish exposed surfaces with a metal jacket.

3.5 INSTALLATION OF MINERAL-FIBER INSULATION

A. Insulation Installation on Straight Pipes and Tubes:

1. Secure each layer of preformed pipe insulation to pipe with wire or bands and tighten bands without deforming insulation materials.
2. Where vapor barriers are indicated, seal longitudinal seams, end joints, and protrusions with vapor-barrier mastic and joint sealant.
3. For insulation with factory-applied jackets on above-ambient surfaces, secure laps with outward-clinched staples at 6 inches o.c.
4. For insulation with factory-applied jackets on below-ambient surfaces, do not staple longitudinal tabs. Instead, secure tabs with additional adhesive as recommended by insulation material manufacturer and seal with vapor-barrier mastic and flashing sealant.

B. Insulation Installation on Pipe Flanges:

1. Install preformed pipe insulation to outer diameter of pipe flange.
2. Make width of insulation section same as overall width of flange and bolts, plus twice the thickness of pipe insulation.
3. Fill voids between inner circumference of flange insulation and outer circumference of adjacent straight pipe segments with mineral-fiber blanket insulation.
4. Install jacket material with manufacturer's recommended adhesive, overlap seams at least 1 inch, and seal joints with flashing sealant.

C. Insulation Installation on Pipe Fittings and Elbows:

1. Install preformed sections of same material as straight segments of pipe insulation when available.
2. When preformed insulation elbows and fittings are not available, install mitered sections of pipe insulation, to a thickness equal to adjoining pipe insulation. Secure insulation materials with wire or bands.

D. Insulation Installation on Valves and Pipe Specialties:

1. Install preformed sections of same material as straight segments of pipe insulation when available.
2. When preformed sections are not available, install mitered sections of pipe insulation to valve body.
3. Arrange insulation to permit access to packing and to allow valve operation without disturbing insulation.
4. Install insulation to flanges as specified for flange insulation application.

3.6 PIPING INSULATION SCHEDULE, GENERAL

- #### A.
- Acceptable preformed pipe and tubular insulation materials and thicknesses are identified for each piping system and pipe size range. If more than one material is listed for a piping system, selection from materials listed is Contractor's option.

3.7 INDOOR PIPING INSULATION SCHEDULE

A. Heating-Hot-Water Supply and Return, 200 Deg F and Below:

1. NPS 1.25 and Smaller: Insulation shall be the following:
 - a. Mineral-Fiber, Preformed Pipe, Type I: 1-1/2 inch thick.

2. NPS 1.5 and Larger: Insulation shall be the following:
 - a. Mineral-Fiber, Preformed Pipe, Type I: 2 inch thick.

END OF SECTION 230719

SECTION 230923 - DIRECT DIGITAL CONTROL (DDC) SYSTEM FOR HVAC

PART 1 - GENERAL

1.1 SUMMARY

A. Section Includes:

1. DDC system for monitoring and controlling of HVAC systems.
2. **Replacement of the existing Alerton system software with new web-based software as described including required gateways, routers, etc. to allow system software to communicate with existing controllers.**
3. Delivery of selected control devices to equipment and systems manufacturers for factory installation and to HVAC systems installers for field installation.

B. Related Requirements:

1. Section 230993 "Sequence of Operations for HVAC Controls" for control sequences in DDC systems.

1.2 DEFINITIONS

A. Algorithm: A logical procedure for solving a recurrent mathematical problem. A prescribed set of well-defined rules or processes for solving a problem in a finite number of steps.

B. Analog: A continuously varying signal value, such as current, flow, pressure, or temperature.

C. BACnet Specific Definitions:

1. BACnet: Building Automation Control Network Protocol, ASHRAE 135. A communications protocol allowing devices to communicate data over and services over a network.
2. BACnet Interoperability Building Blocks (BIBBs): BIBB defines a small portion of BACnet functionality that is needed to perform a particular task. BIBBs are combined to build the BACnet functional requirements for a device.
3. BACnet/IP: Defines and allows using a reserved UDP socket to transmit BACnet messages over IP networks. A BACnet/IP network is a collection of one or more IP subnetworks that share the same BACnet network number.
4. BACnet Testing Laboratories (BTL): Organization responsible for testing products for compliance with ASHRAE 135, operated under direction of BACnet International.
5. PICS (Protocol Implementation Conformance Statement): Written document that identifies the particular options specified by BACnet that are implemented in a device.

D. Binary: Two-state signal where a high signal level represents ON" or "OPEN" condition and a low signal level represents "OFF" or "CLOSED" condition. "Digital" is sometimes used interchangeably with "Binary" to indicate a two-state signal.

- E. Controller: Generic term for any standalone, microprocessor-based, digital controller residing on a network, used for local or global control. Three types of controllers are indicated: Network Controller, Programmable Application Controller, and Application-Specific Controller.
- F. Gateway: Bidirectional protocol translator that connects control systems that use different communication protocols.
- G. I/O: System through which information is received and transmitted. I/O refers to analog input (AI), binary input (BI), analog output (AO) and binary output (BO). Analog signals are continuous and represent control influences such as flow, level, moisture, pressure, and temperature. Binary signals convert electronic signals to digital pulses (values) and generally represent two-position operating and alarm status. "Digital," (DI and (DO), is sometimes used interchangeably with "Binary," (BI) and (BO), respectively.
- H. LAN: Local area network.
- I. Low Voltage: As defined in NFPA 70 for circuits and equipment operating at less than 50 V or for remote-control, signaling power-limited circuits.
- J. Modbus TCP/IP: An open protocol for exchange of process data.
- K. MS/TP: Master-slave/token-passing, IEE 8802-3. Datalink protocol LAN option that uses twisted-pair wire for low-speed communication.
- L. Network Controller: Digital controller, which supports a family of programmable application controllers and application-specific controllers, that communicates on peer-to-peer network for transmission of global data.
- M. Network Repeater: Device that receives data packet from one network and rebroadcasts it to another network. No routing information is added to protocol.
- N. RAM: Random access memory.
- O. RF: Radio frequency.
- P. Router: Device connecting two or more networks at network layer.
- Q. TCP/IP: Transport control protocol/Internet protocol incorporated into Microsoft Windows.
- R. USB: Universal Serial Bus.
- S. User Datagram Protocol (UDP): This protocol assumes that the IP is used as the underlying protocol.
- T. VAV: Variable air volume.
- U. WLED: White light emitting diode.

1.3 PREINSTALLATION MEETINGS

- A. Preinstallation Conference: Conduct conference at Project site.

1.4 ACTION SUBMITTALS

A. Product Data: For each type of product include the following:

1. Construction details, material descriptions, dimensions of individual components and profiles, and finishes.
2. Product description with complete technical data, performance curves, and product specification sheets.
3. Installation, operation and maintenance instructions including factors effecting performance.
4. Bill of materials of indicating quantity, manufacturer, and extended model number for each unique product.
 - a. Gateways.
 - b. Routers.
 - c. DDC controllers.
 - d. Accessories.
 - e. Instruments.
 - f. Control valves and actuators.
5. When manufacturer's product datasheets apply to a product series rather than a specific product model, clearly indicate and highlight only applicable information.
6. Each submitted piece of product literature shall clearly cross reference specification and drawings that submittal is to cover.

B. Software Submittal:

1. Cross-referenced listing of software to be loaded on each existing operator workstation, server, gateway, and DDC controller.
2. Description and technical data of all software provided, and cross-referenced to products in which software will be installed.
3. Operating system software, operator interface and programming software, color graphic software, DDC controller software, maintenance management software, and third-party software.
4. Description of each network communication protocol.

C. Shop Drawings:

1. Include plans, elevations, sections, and mounting details where applicable.
2. DDC system network riser diagram indicating the following:
 - a. Each device connected to network with unique identification for each.
 - b. Interconnection of each different network in DDC system.
 - c. For each network, indicate communication protocol, speed and physical means of interconnecting network devices, such as copper cable type, or fiber-optic cable type. Indicate raceway type and size for each.
 - d. Each network port for connection of an operator workstation or other type of operator interface with unique identification for each.
3. Monitoring and control signal diagrams indicating the following:

- a. Control signal cable and wiring between controllers and I/O.
 - b. Point-to-point schematic wiring diagrams for each product.
4. Color graphics indicating the following:
- a. Itemized list of color graphic displays to be provided.
 - b. For each display screen to be provided, a true color copy showing layout of pictures, graphics and data displayed.
 - c. Intended operator access between related hierarchical display screens.

D. System Description:

1. Full description of DDC system architecture, network configuration, operator interfaces and peripherals, servers, controller types and applications, gateways, routers and other network devices, and power supplies.
2. Complete listing and description of each report, log and trend for format and timing and events which initiate generation.
3. System and product operation under each potential failure condition including, but not limited to, the following:
 - a. Loss of power.
 - b. Loss of network communication signal.
 - c. Loss of controller signals to inputs and outpoints.
 - d. Operator workstation failure.
 - e. Gateway failure.
 - f. Network failure
 - g. Controller failure.
 - h. Instrument failure.
 - i. Control damper and valve actuator failure.
4. Complete bibliography of documentation and media to be delivered to Owner.
5. Description of testing plans and procedures.
6. Description of Owner training.

1.5 CLOSEOUT SUBMITTALS

A. Operation and Maintenance Data: For DDC system to include in emergency, operation and maintenance manuals.

1. Include the following:
 - a. Project Record Drawings of as-built versions of submittal Shop Drawings provided in electronic PDF format.
 - b. Testing and commissioning reports and checklists of completed final versions of reports, checklists, and trend logs.
 - c. Names, addresses, e-mail addresses and 24-hour telephone numbers of Installer and service representatives for DDC system and products.
 - d. Operator's manual with procedures for operating control systems including logging on and off, handling alarms, producing point reports, trending data, overriding computer control and changing set points and variables.

- e. Programming manuals with description of programming language and syntax, of statements for algorithms and calculations used, of point database creation and modification, of program creation and modification, and of editor use.
- f. Engineering, installation, and maintenance manuals that explain how to:
 - 1) Design and install new points, panels, and other hardware.
 - 2) Perform preventive maintenance and calibration.
 - 3) Debug hardware problems.
 - 4) Repair or replace hardware.
- g. Documentation of all programs created using custom programming language including set points, tuning parameters, and object database.
- h. Backup copy of graphic files, programs, and database on electronic media such as DVDs.
- i. List of recommended spare parts with part numbers and suppliers.
- j. Complete original-issue documentation, installation, and maintenance information for furnished third-party hardware including computer equipment and sensors.
- k. Complete original-issue copies of furnished software, including operating systems, custom programming language, operator workstation software, and graphics software.
- l. Licenses, guarantees, and warranty documents.
- m. Recommended preventive maintenance procedures for system components, including schedule of tasks such as inspection, cleaning, and calibration; time between tasks; and task descriptions.
- n. Owner training materials.

1.6 QUALITY ASSURANCE

A. DDC System Manufacturer Qualifications:

- 1. Nationally recognized manufacturer of DDC systems and products.
- 2. Having complete published catalog literature, installation, operation and maintenance manuals for all products intended for use.
- 3. Having full-time in-house employees for the following:
 - a. Product research and development.
 - b. Product and application engineering.
 - c. Product manufacturing, testing and quality control.
 - d. Technical support for DDC system installation training, commissioning and troubleshooting of installations.
 - e. Owner operator training.

B. DDC System Provider Qualifications:

- 1. Authorized representative of, and trained by, DDC system manufacturer.
- 2. In-place facility located within 60 minutes of Project.
- 3. Each person assigned to Project shall have demonstrated past experience.
- 4. Staffing resources of competent and experienced full-time employees that are assigned to execute work according to schedule.
- 5. Service and maintenance staff assigned to support Project during warranty period.

6. Product parts inventory to support on-going DDC system operation for a period of not less than 5 years after Substantial Completion.

1.7 WARRANTY

- A. Manufacturer's Warranty: Manufacturer and Installer agree to repair or replace products that fail in materials or workmanship within specified warranty period.
 1. Failures shall be adjusted, repaired, or replaced at no additional cost or reduction in service to Owner.
 2. Include updates or upgrades to software and firmware if necessary to resolve deficiencies.
 - a. Install updates only after receiving Owner's written authorization.
 3. Warranty service shall occur during normal business hours and commence within 24 hours of Owner's warranty service request.
 4. Warranty Period: Two year(s) from date of Substantial Completion.
 - a. For Gateway: Two-year parts and labor warranty for each.

PART 2 - PRODUCTS

2.1 MANUFACTURERS

- A. Products: Subject to compliance with requirements, provide one of the following:
 1. Alpha Controls.
 2. Delta Controls Inc.
 3. Johnson Controls, Inc.
 4. Siemens.

2.2 DDC SYSTEM DESCRIPTION

- A. Microprocessor-based monitoring and control including analog/digital conversion and program logic. A control loop or subsystem in which digital and analog information is received and processed by a microprocessor, and digital control signals are generated based on control algorithms and transmitted to field devices to achieve a set of predefined conditions.

2.3 WEB ACCESS

- A. DDC system shall be Web based.
 1. Web-Based Access to DDC System:
 - a. DDC system software shall be based on server thin-client architecture, designed around open standards of Web technology. DDC system server shall be accessed

using a Web browser over DDC system network, using Owner's LAN, and remotely over Internet.

- b. Intent of thin-client architecture is to provide operators complete access to DDC system via a Web browser. No special software other than a Web browser shall be required to access graphics, point displays, and trends; to configure trends, points, and controllers; and to edit programming.
- c. Web access shall be password protected.

2.4 SYSTEM ARCHITECTURE

- A. Conduct field verification of existing Allerton Control automation system to determine communication/interface requirements.

2.5 DDC SYSTEM OPERATOR INTERFACES

- A. Operator Means of System Access: Operator shall be able to access entire DDC system through any of multiple means, including, but not limited to, the following:
 - 1. Existing desktop operator workstation with hardwired connection through LAN port.
 - 2. Remote connection using outside of system personal computer or PDA through Web access.
- B. Access to system, regardless of operator means used, shall be transparent to operator.
- C. Existing Desktop Workstations:
 - 1. Connect to DDC system Level one LAN through a communications port directly on LAN or through a communications port on a DDC controller.
 - 2. Able to communicate with any device located on any DDC system LAN.
 - 3. Able to communicate, with modems, remotely with any device connected to any DDC system LAN.
 - 4. Communication via a modem shall not interfere with LAN activity and LAN activity shall not prevent workstation from handling incoming calls.
- D. Critical Alarm Reporting:
 - 1. Operator-selected critical alarms shall be sent by DDC system to notify operator of critical alarms that require immediate attention.
 - 2. DDC system shall send alarm notification to multiple recipients that are assigned for each alarm.
 - 3. DDC system shall notify recipients by any or all means, including e-mail, text message, and prerecorded phone message to mobile and landline phone numbers.

2.6 NETWORKS

- A. Field verify network currently in place at the Bloomington Public Library to determine and properly address compatibility/communication interface issues:

2.7 NETWORK COMMUNICATION PROTOCOL

- A. Network communication protocol(s) used throughout entire DDC system shall be open to public and available to other companies for use in making future modifications to DDC system.
- B. ASHRAE 135 Protocol:
 - 1. ASHRAE 135 communication protocol shall be sole and native protocol used throughout entire DDC system.
 - 2. DDC system shall not require use of gateways except to integrate HVAC equipment and other building systems and equipment, not required to use ASHRAE 135 communication protocol.
 - 3. If used, gateways shall connect to DDC system using ASHRAE 135 communication protocol and Project object properties and read/write services indicated by interoperability schedule.
 - 4. Operator workstations, controllers and other network devices shall be tested and listed by BACnet Testing Laboratories.
- C. Industry Standard Protocols:
 - 1. New DDC system components shall use any one or a combination of the following industry standard protocols for network communication while complying with other DDC system requirements indicated:
 - a. ASHRAE 135.
 - 2. Gateways shall be used to connect networks and network devices using different protocols.

2.8 EXISTING DESKTOP OPERATOR WORKSTATIONS

- A. Performance Requirements:
 - 1. Field verify existing hardware, operating system, memory, etc. are adequate to accommodate system software.

2.9 SYSTEM SOFTWARE

- A. Operator Interface Software:
 - 1. Minimize operator training through use of English language prorating and English language point identification.
 - 2. Minimize use of a typewriter-style keyboard through use of a pointing device similar to a mouse.
 - 3. Operator sign-off shall be a manual operation or, if no keyboard or mouse activity takes place, an automatic sign-off.
 - 4. Automatic sign-off period shall be programmable from one to 60 minutes in one-minute increments on a per operator basis.
 - 5. Operator sign-on and sign-off activity shall be recorded.

6. Security Access:
 - a. Operator access to DDC system shall be under password control.
 - b. An alphanumeric password shall be field assignable to each operator.
 - c. Operators shall be able to access DDC system by entry of proper password.
 - d. Operator password shall be same regardless of which computer or other interface means is used.
 - e. Additions or changes made to passwords shall be updated automatically.
 - f. Each operator shall be assigned an access level to restrict access to data and functions the operator is cable of performing.
 - g. Software shall have at least three access levels.
 - h. Each menu item shall be assigned an access level so that a one-for-one correspondence between operator assigned access level(s) and menu item access level(s) is required to gain access to menu item.
 - i. Display menu items to operator with those capable of access highlighted. Menu and operator access level assignments shall be online programmable and under password control.
7. Data Segregation:
 - a. Include data segregation for control of specific data routed to a workstation, to an operator or to a specific output device, such as a printer.
 - b. Segregation groups shall be selectable such as "space temperature points," "HVAC points," and so on.
 - c. Points shall be assignable to multiple segregation groups. Display and output of data to printer or monitor shall occur where there is a match of operator or peripheral segregation group assignment and point segregations.
 - d. Alarms shall be displayed and printed at each peripheral to which segregation allows, but only those operators assigned to peripheral and having proper authorization level will be allowed to acknowledge alarms.
 - e. Operators and peripherals shall be assignable to multiple segregation groups and all assignments are to be online programmable and under password control.
8. Operators shall be able to perform commands including, but not limited to, the following:
 - a. Start or stop selected equipment.
 - b. Adjust set points.
 - c. Add, modify, and delete time programming.
 - d. Enable and disable process execution.
 - e. Lock and unlock alarm reporting for each point.
 - f. Enable and disable trending for each point.
 - g. Override control loop set points.
 - h. Enter temporary override schedules.
 - i. Define holiday schedules.
 - j. Change time and date.
 - k. Enter and modify analog alarm limits.
 - l. Enter and modify analog warning limits.
 - m. View limits.
 - n. Display logic programming for each control sequence.
9. Reporting:

- a. Generated automatically and manually.
- b. Sent to displays, printers and disk files.
- c. Types of Reporting:
 - 1) General listing of points.
 - 2) List points currently in alarm.
 - 3) List of off-line points.
 - 4) List points currently in override status.
 - 5) List of disabled points.
 - 6) List points currently locked out.
 - 7) List of items defined in a "Follow-Up" file.
 - 8) List weekly schedules.
 - 9) List holiday programming.
 - 10) List of limits and deadbands.

- 10. Summaries: For specific points, for a logical point group, for an operator selected group(s), or for entire system without restriction due to hardware configuration.

B. Graphic Interface Software:

- 1. Include a full interactive graphical selection means of accessing and displaying system data to operator. Include at least five levels with the penetration path operator assignable (for example, site, building, floor, air-handling unit, and supply temperature loop). Native language descriptors assigned to menu items are to be operator defined and modifiable under password control.
- 2. Include a hierarchical-linked dynamic graphic operator interface for accessing and displaying system data and commanding and modifying equipment operation. Interface shall use a pointing device with pull-down or penetrating menus, color and animation to facilitate operator understanding of system.
- 3. Include at least 10 levels of graphic penetration with the hierarchy operator assignable.
- 4. Descriptors for graphics, points, alarms and such shall be modified through operator's workstation under password control.
- 5. Graphic displays shall be online user definable and modifiable using the hardware and software provided.
- 6. Data to be displayed within a graphic shall be assignable regardless of physical hardware address, communication or point type.
- 7. Graphics are to be online programmable and under password control.
- 8. Points may be assignable to multiple graphics where necessary to facilitate operator understanding of system operation.
- 9. Graphics shall also contain software points.
- 10. Penetration within a graphic hierarchy shall display each graphic name as graphics are selected to facilitate operator understanding.
- 11. Back-trace feature shall permit operator to move upward in the hierarchy using a pointing device. Back trace shall show all previous penetration levels. Include operator with option of showing each graphic full screen size with back trace as horizontal header or by showing a "stack" of graphics, each with a back trace.
- 12. Display operator accessed data on the monitor.
- 13. Operator shall select further penetration using pointing device to click on a site, building, floor, area, equipment, and so on. Defined and linked graphic below that selection shall then be displayed.

14. Include operator with means to directly access graphics without going through penetration path.
15. Dynamic data shall be assignable to graphics.
16. Display points (physical and software) with dynamic data provided by DDC system with appropriate text descriptors, status or value, and engineering unit.
17. Use color, rotation, or other highly visible means, to denote status and alarm states. Color shall be variable for each class of points, as chosen by operator.
18. For operators with appropriate privilege, points shall be commanded directly from display using pointing device.
 - a. For an analog command point such as set point, current conditions and limits shall be displayed and operator can position new set point using pointing device.
 - b. For a digital command point such as valve position, valve shall show its current state such as open or closed and operator could select alternative position using pointing device.
 - c. Keyboard equivalent shall be available for those operators with that preference.
19. Operator shall be able to split or resize viewing screen into quadrants to show one graphic on one quadrant of screen and other graphics or spreadsheet, bar chart, word processing, curve plot and other information on other quadrants on screen. This feature shall allow real-time monitoring of one part of system while displaying other parts of system or data to better facilitate overall system operation.
20. Help Features:
 - a. On-line context-sensitive help utility to facilitate operator training and understanding.
 - b. Bridge to further explanation of selected keywords. Document shall contain text and graphics to clarify system operation.
 - 1) If help feature does not have ability to bridge on keywords for more information, a complete set of user manuals shall be provided in an indexed word-processing program, which shall run concurrently with operating system software.
 - c. Available for Every Menu Item:
 - 1) Index items for each system menu item.
21. Graphic generation software shall allow operator to add, modify, or delete system graphic displays.
 - a. Graphic development package shall use a pointing device in conjunction with a drawing program to allow operator to perform the following:
 - 1) Define background screens.
 - 2) Define connecting lines and curves.
 - 3) Locate, orient and size descriptive text.
 - 4) Define and display colors for all elements.
 - 5) Establish correlation between symbols or text and associated system points or other displays.

C. Project-Specific Graphics: Graphics documentation including, but not limited to, the following:

1. Plan for each building floor, including interstitial floors, and each roof level of each building, showing the following:
 - a. Room layouts with room identification and name.
 - b. Locations and identification of all monitored and controlled HVAC equipment and other equipment being monitored and controlled by DDC system.
 - c. Location and identification of each hardware point being controlled or monitored by DDC system.
2. Control schematic for each of following, including a graphic system schematic representation, similar to existing, with point identification, set point and dynamic value indication.
 - a. Chilled-water system.
 - b. Heating hot-water system.
 - c. Steam system.
 - d. Air-handling system.
 - e. Fan.
 - f. Pump.
 - g. Rooftop unit.
 - h. Terminal unit.
 - i. Other existing systems presently monitored and/or controlled.
3. Graphic display for each piece of equipment connected to DDC system through a data communications link. Include dynamic indication of all points associated with equipment.

D. Customizing Software:

1. Software to modify and tailor DDC system to specific and unique requirements of equipment installed, to programs implemented and to staffing and operational practices planned.
2. Online modification of DDC system configuration, program parameters, and database using menu selection and keyboard entry of data into preformatted display templates.
3. As a minimum, include the following modification capability:
 - a. Operator assignment shall include designation of operator passwords, access levels, point segregation and auto sign-off.
 - b. Peripheral assignment capability shall include assignment of segregation groups and operators to consoles and printers, designation of backup workstations and printers, designation of workstation header points and enabling and disabling of print-out of operator changes.
 - c. System configuration and diagnostic capability shall include communications and peripheral port assignments, DDC controller assignments to network, DDC controller enable and disable, assignment of command trace to points and application programs and initiation of diagnostics.
 - d. System text addition and change capability shall include English or native language descriptors for points, segregation groups and access levels and action messages for alarms, run time and trouble condition.

- e. Time and schedule change capability shall include time and date set, time and occupancy schedules, exception and holiday schedules and daylight savings time schedules.
- f. Point related change capability shall include the following:
 - 1) System and point enable and disable.
 - 2) Run-time enable and disable.
 - 3) Assignment of points to segregation groups, calibration tables, lockout, and run time and to a fixed I/O value.
 - 4) Assignment of alarm and warning limits.
- g. Application program change capability shall include the following:
 - 1) Enable and disable of software programs.
 - 2) Programming changes.
 - 3) Assignment of comfort limits, global points, time and event initiators, time and event schedules and enable and disable time and event programs.

E. Alarm Handling Software:

- 1. Include alarm handling software to report all alarm conditions monitored and transmitted through DDC controllers, gateways and other network devices.
- 2. Include first in, first out handling of alarms according to alarm priority ranking, with most critical alarms first, and with buffer storage in case of simultaneous and multiple alarms.
- 3. Alarm handling shall be active at all times to ensure that alarms are processed even if an operator is not currently signed on to DDC system.
- 4. Alarms display shall include the following:
 - a. Indication of alarm condition such as "Abnormal Off," "Hi Alarm," and "Low Alarm."
 - b. "Analog Value" or "Status" group and point identification with native language point descriptor such as "Space Temperature, Building 110, 2nd Floor, Room 212."
 - c. Discrete per point alarm action message, such as "Call Maintenance Dept. Ext-5561."
 - d. Include extended message capability to allow assignment and printing of extended action messages. Capability shall be operator programmable and assignable on a per point basis.
- 5. Alarms shall be directed to appropriate operator workstations, printers, and individual operators by privilege level and segregation assignments.
- 6. Send e-mail alarm messages to designated operators.
- 7. Send e-mail, page, text and voice messages to designated operators for critical alarms.
- 8. Alarms shall be categorized and processed by class.
 - a. Class 1:
 - 1) Associated with fire, security and other extremely critical equipment monitoring functions; have alarm, trouble, return to normal, and acknowledge conditions printed and displayed.

- 2) Unacknowledged alarms to be placed in unacknowledged alarm buffer.
- 3) All conditions shall cause an audible sound and shall require individual acknowledgment to silence audible sound.

b. Class 2:

- 1) Critical, but not life-safety related, and processed same as Class 1 alarms, except do not require individual acknowledgment.
- 2) Acknowledgement may be through a multiple alarm acknowledgment.

c. Class 3:

- 1) General alarms; printed, displayed and placed in unacknowledged alarm buffer queues.
- 2) Each new alarm received shall cause an audible sound. Audible sound shall be silenced by "acknowledging" alarm or by pressing a "silence" key.
- 3) Acknowledgement of queued alarms shall be either on an individual basis or through a multiple alarm acknowledgement.
- 4) Alarms returning to normal condition shall be printed and not cause an audible sound or require acknowledgment.

d. Class 4:

- 1) Routine maintenance or other types of warning alarms.
- 2) Alarms to be printed only, with no display, no audible sound and no acknowledgment required.

9. Include an unacknowledged alarm indicator on display to alert operator that there are unacknowledged alarms in system. Operator shall be able to acknowledge alarms on an individual basis or through a multiple alarm acknowledge key, depending on alarm class.
10. To ensure that no alarm records are lost, it shall be possible to assign a backup printer to accept alarms in case of failure of primary printer.

F. Reports and Logs:

1. Include reporting software package that allows operator to select, modify, or create reports using DDC system I/O point data available.
2. Each report shall be definable as to data content, format, interval and date.
3. Operator shall be able to obtain real-time logs of all I/O points by type or status, such as alarm, point lockout, or normal.
4. Reports and logs shall be stored on workstation hard drives in a format that is readily accessible by other standard software applications, including spreadsheets and word processing.
5. Reports and logs shall be readily printed and set to be printed either on operator command or at a specific time each day.

G. Custom Reports: Operator shall be able to easily define any system data into a daily, weekly, monthly, or annual report. Reports shall be time and date stamped and shall contain a report title.

H. Standard Trends:

1. Trend all I/O point present values, set points, and other parameters indicated for trending.
2. Trends shall be associated into groups, and a trend report shall be set up for each group.
3. Preset trend intervals for each I/O point after review with Owner.
4. Trend intervals shall be operator selectable from 10 seconds up to 60 minutes. Minimum number of consecutive trend values stored at one time shall be 100 per variable.
5. When drive storage memory is full, most recent data shall overwrite oldest data.
6. Archived and real-time trend data shall be available for viewing numerically and graphically by operators.

I. Custom Trends: Operator shall be able to define a custom trend log for any I/O point in DDC system.

1. Each trend shall include interval, start time, and stop time.
2. Data shall be sampled and stored on DDC controller, within storage limits of DDC controller, and then uploaded to archive on workstation hard drives.
3. Data shall be retrievable for use in spreadsheets and standard database programs.

J. Programming Software:

1. Include programming software to execute existing sequences of operation.
2. Include programming routines in simple and easy to follow logic with detailed text comments describing what the logic does and how it corresponds to sequence of operation.

2.10 ASHRAE 135 GATEWAYS

- A. Include BACnet communication ports, whenever available as an equipment OEM standard option, for integration via a single communication cable. BACnet-controlled plant equipment includes, but is not limited to, boilers, chillers, and variable-speed drives.
- B. Include gateways to connect BACnet to legacy systems, existing non-BACnet devices, and existing non-BACnet DDC-controlled equipment.
- C. Include with each gateway an interoperability schedule showing each point or event on legacy side that BACnet "client" will read, and each parameter that BACnet network will write to. Describe this interoperability of BACnet services, or BIBBs, defined in ASHRAE 135, Annex K.
- D. Gateway Minimum Requirements:
 1. Read and view all readable object properties on non-BACnet network to BACnet network and vice versa where applicable.
 2. Write to all writeable object properties on non-BACnet network from BACnet network and vice versa where applicable.
 3. Include single-pass (only one protocol to BACnet without intermediary protocols) translation from non-BACnet protocol to BACnet and vice versa.
 4. Comply with requirements of Data Sharing Read Property, Data Sharing Write Property, Device Management Dynamic Device Binding-B, and Device Management Communication Control BIBBs according to ASHRAE 135.

5. Hardware, software, software licenses, and configuration tools for operator-to-gateway communications.
6. Backup programming and parameters on CD media and the ability to modify, download, backup, and restore gateway configuration.

2.11 DDC CONTROLLERS (new equipment)

- A. DDC system shall consist of a combination of network controllers, programmable application controllers and application-specific controllers to satisfy performance requirements indicated.
- B. DDC controllers shall perform monitoring, control, energy optimization and other requirements indicated.
- C. DDC controllers shall use a multitasking, multiuser, real-time digital control microprocessor with a distributed network database and intelligence.
- D. Each DDC controller shall be capable of full and complete operation as a completely independent unit and as a part of a DDC system wide distributed network.

2.12 NETWORK CONTROLLERS

- A. General Network Controller Requirements (new equipment):
 1. Include adequate number of controllers to achieve performance indicated.
 2. System shall consist of one or more independent, standalone, microprocessor-based network controllers to manage global strategies indicated.
 3. Controller shall have enough memory to support its operating system, database, and programming requirements.
 4. Data shall be shared between networked controllers and other network devices.
 5. Operating system of controller shall manage input and output communication signals to allow distributed controllers to share real and virtual object information and allow for central monitoring and alarms.
 6. Controllers that perform scheduling shall have a real-time clock.
 7. Controller shall continually check status of its processor and memory circuits. If an abnormal operation is detected, controller shall assume a predetermined failure mode and generate an alarm notification.
 8. Controllers shall be fully programmable.
- B. Communication:
 1. Network controllers shall communicate with other devices on DDC system network.

2.13 CONTROLLER SOFTWARE

- A. General Controller Software Requirements:
 1. Software applications shall reside and operate in controllers. Editing of applications shall occur at operator workstations.
 2. Control functions shall be executed within controllers using DDC algorithms.

3. Controllers shall be configured to use stored default values to ensure fail-safe operation. Default values shall be used when there is a failure of a connected input instrument or loss of communication of a global point value.
- B. Security:
1. Operator access shall be secured using individual security passwords and user names.
 2. Passwords shall restrict operator to points, applications, and system functions as assigned by system manager.
 3. Operator log-on and log-off attempts shall be recorded.
 4. System shall protect itself from unauthorized use by automatically logging off after last keystroke. The delay time shall be operator-definable.
- C. Scheduling: Include capability to schedule each point or group of points in system. Each schedule shall consist of the following:
1. Weekly Schedule:
 - a. Include separate schedules for each day of week.
 - b. Each schedule should include the capability for start, stop, optimal start, optimal stop, and night economizer.
 - c. Each schedule may consist of up to 10 events.
 - d. When a group of objects are scheduled together, include capability to adjust start and stop times for each member.
 2. Exception Schedules:
 - a. Include ability for operator to designate any day of the year as an exception schedule.
 - b. Exception schedules may be defined up to a year in advance. Once an exception schedule is executed, it will be discarded and replaced by regular schedule for that day of week.
 3. Holiday Schedules:
 - a. Include capability for operator to define up to 99 special or holiday schedules.
 - b. Schedules may be placed on scheduling calendar and will be repeated each year.
 - c. Operator shall be able to define length of each holiday period.
- D. System Coordination:
1. Include standard application for proper coordination of equipment.
 2. Application shall include operator with a method of grouping together equipment based on function and location.
 3. Group may then be used for scheduling and other applications.
- E. Binary Alarms:
1. Each binary point shall be set to alarm based on operator-specified state.
 2. Include capability to automatically and manually disable alarming.

F. Analog Alarms:

1. Each analog object shall have both high and low alarm limits.
2. Alarming shall be able to be automatically and manually disabled.

G. Alarm Reporting:

1. Operator shall be able to determine action to be taken in event of an alarm.
2. Alarms shall be routed to appropriate operator workstations based on time and other conditions.
3. Alarm shall be able to start programs, print, be logged in event log, generate custom messages, and display graphics.

H. Remote Communication:

1. System shall have ability to dial out in the event of an alarm.

I. Maintenance Management: System shall monitor equipment status and generate maintenance messages based on operator-designated run-time, starts, and calendar date limits.

J. Sequencing: Include application software based on existing sequences of operation to properly sequence chillers, boilers, and other applicable HVAC equipment.

K. Control Loops:

1. Support any of the following control loops, as applicable to control required:
 - a. Two-position (on/off, open/close, slow/fast) control.
 - b. Proportional control.
 - c. Proportional plus integral (PI) control.
 - d. Proportional plus integral plus derivative (PID) control.
 - 1) Include PID algorithms with direct or reverse action and anti-windup.
 - 2) Algorithm shall calculate a time-varying analog value used to position an output or stage a series of outputs.
 - 3) Controlled variable, set point, and PID gains shall be operator-selectable.
 - e. Adaptive (automatic tuning).

L. Staggered Start: Application shall prevent all controlled equipment from simultaneously restarting after a power outage. Order which equipment (or groups of equipment) is started, along with the time delay between starts, shall be operator-selectable.

PART 3 - EXECUTION

3.1 EXAMINATION

- A. Examine substrates and conditions for compliance with requirements for installation tolerances and other conditions affecting performance of the Work.

1. Verify compatibility with and suitability of substrates.
- B. Examine roughing-in for products to verify actual locations of connections before installation.
 1. Examine roughing-in for instruments installed in piping to verify actual locations of connections before installation.
- C. Examine existing walls, floors, roofs, and ceilings for suitable conditions where product will be installed.
- D. Prepare written report, endorsed by Installer, listing conditions detrimental to performance of the Work.
- E. Proceed with installation only after unsatisfactory conditions have been corrected.

3.2 DDC SYSTEM INTERFACE WITH OTHER SYSTEMS AND EQUIPMENT

- A. Communication Interface to Equipment with Integral Controls:
 1. DDC system shall have communication interface with equipment having integral controls and having a communication interface for remote monitoring or control
 2. **DDC system shall be fully compatible and interface with all existing controllers currently employed within the facility.**
 3. Equipment to Be Connected:
 - a. Boilers specified in Section 235216 "Condensing Boilers."
 - b. Humidifiers specified in Section 238413 "Humidifiers."

3.3 GENERAL INSTALLATION REQUIREMENTS

- A. Install products to satisfy more stringent of all requirements indicated.
- B. Install products level, plumb, parallel, and perpendicular with building construction.
- C. Support products, tubing, piping wiring and raceways.
- D. If codes and referenced standards are more stringent than requirements indicated, comply with requirements in codes and referenced standards.
- E. Fabricate openings and install sleeves in ceilings, floors, roof, and walls required by installation of products. Before proceeding with drilling, punching, and cutting, check for concealed work to avoid damage. Patch, flash, grout, seal, and refinish openings to match adjacent condition.
- F. Firestop penetrations made in fire-rated assemblies.

3.4 EXISTING OPERATOR WORKSTATION INSTALLATION

- A. Existing Desktop Operator Workstations Installation:

1. Install software on workstation(s) and verify software functions properly.
2. Develop Project-specific graphics, trends, reports, logs and historical database.

B. Color Graphics Application:

1. Use existing software system schematics indicated as starting point to create graphics.
2. Develop Project-specific library of symbols for representing system equipment and products.
3. Incorporate digital images of Project-completed installation into graphics where beneficial to enhance effect.
4. Submit sketch of graphic layout with description of all text for each graphic for Owner's review before creating graphic using graphics software.
5. Seek Owner input in graphics development once using graphics software.
6. Final editing shall be done on-site with Owner's review and feedback.
7. Refine graphics as necessary for Owner acceptance.
8. On receiving Owner acceptance, print a hard copy for inclusion in operation and maintenance manual. Prepare a scanned copy PDF file of each graphic and include with softcopy of DDC system operation and maintenance manual.

3.5 GATEWAY INSTALLATION

- A. Install gateways if required for DDC system communication interface.
- B. Test gateway to verify that communication interface functions properly.

3.6 ROUTER INSTALLATION

- A. Install routers if required for DDC system communication interface.
- B. Test router to verify that communication interface functions properly.

3.7 ELECTRIC POWER CONNECTIONS

- A. Connect electrical power to DDC system products requiring electrical power connections.
- B. **Design of electrical power to products not indicated with electric power is delegated to DDC system provider.** Work shall comply with NFPA 70 and other requirements indicated.

3.8 NETWORK INSTALLATION

- A. Install copper cable when connecting between the following network devices located in same building:
 1. Existing operator workstations and network controllers.
 2. Network controllers.
- B. Install copper cable when connecting between the following:

1. Gateways.
2. Gateways and network controllers or programmable application controllers.
3. Routers.
4. Routers and network controllers.

3.9 FIELD QUALITY CONTROL

- A. Manufacturer's Field Service: Engage a factory-authorized service representative to test and inspect components, assemblies, and installations, including connections.

3.10 DDC SYSTEM I/O CHECKOUT PROCEDURES

- A. Check installed products before continuity tests, leak tests and calibration.
- B. Check instruments for proper location and accessibility.
- C. Check instruments for proper installation on direction of flow, elevation, orientation, insertion depth, or other applicable considerations that will impact performance.
- D. Check instrument tubing for proper isolation, fittings, slope, dirt legs, drains, material and support.
- E. Control Valve Checkout:
 1. Verify that control valves are installed correctly for flow direction.
 2. Verify that valve body attachment is properly secured and sealed.
 3. Verify that valve actuator and linkage attachment is secure.
 4. Verify that actuator wiring is complete, enclosed and connected to correct power source.
 5. Verify that valve ball, disc or plug travel is unobstructed.
 6. After piping systems have been tested and put into service, but before insulating and balancing, inspect each valve for leaks. Adjust or replace packing to stop leaks. Replace the valve if leaks persist.
- F. Instrument Checkout:
 1. Verify that instrument is correctly installed for location, orientation, direction and operating clearances.
 2. Verify that attachment is properly secured and sealed.
 3. Verify that conduit connections are properly secured and sealed.
 4. For flow instruments, verify that recommended upstream and downstream distances have been maintained.
 5. For temperature instruments:
 - a. Verify sensing element type and proper material.
 - b. Verify length and insertion.

3.11 DDC SYSTEM I/O ADJUSTMENT, CALIBRATION AND TESTING:

- A. Calibrate each instrument installed that is not factory calibrated and provided with calibration documentation.
- B. Equipment and procedures used for calibration shall comply with instrument manufacturer's written instructions.
- C. Provide diagnostic and test equipment for calibration and adjustment.
- D. Comply with field testing requirements and procedures indicated by ASHRAE's Guideline 11, "Field Testing of HVAC Control Components," in the absence of specific requirements, and to supplement requirements indicated.

3.12 DDC SYSTEM CONTROLLER CHECKOUT

- A. Verify power supply.
 - 1. Verify voltage, phase and hertz.
 - 2. Verify that protection from power surges is installed and functioning.
 - 3. Verify that ground fault protection is installed.
- B. Verify that wire and cabling is properly secured to terminals and labeled with unique identification.
- C. Verify that spare I/O capacity is provided.

3.13 DDC CONTROLLER I/O CONTROL LOOP TESTS

- A. Testing:
 - 1. Test every I/O point connected to DDC controller to verify that safety and operating control set points are as indicated and as required to operate controlled system safely and at optimum performance.
 - 2. Test software and hardware interlocks for proper operation. Correct deficiencies.
 - 3. For every I/O point in DDC system, read and record each value at operator workstation, at DDC controller and at field instrument simultaneously. Value displayed at operator workstation, at DDC controller and at field instrument shall match.

3.14 DDC SYSTEM VALIDATION TESTS

- A. Perform validation tests before requesting final review of system.
- B. Pretest Checklist: Submit the following list with items checked off once verified:
 - 1. Detailed explanation for any items that are not completed or verified.
 - 2. Required mechanical installation work is successfully completed and HVAC equipment is working correctly.
 - 3. Required DDC system components, wiring, and accessories are installed.

4. Installed DDC system architecture matches approved Drawings.
5. DDC system network communications function properly, including uploading and downloading programming changes.
6. Using BACnet protocol analyzer, verify that communications are error free.
7. Each controller's programming is backed up.
8. All I/O points are programmed into controllers.
9. Testing, adjusting and balancing work affecting controls is complete.
10. New Valves and actuators zero and span adjustments are set properly.
11. Each new control valve and actuator goes to failed position on loss of power.
12. New Meter, sensor and transmitter readings are accurate and calibrated.
13. Control loops are tuned for smooth and stable operation.
14. View trend data where applicable.
15. Each controller works properly in standalone mode.
16. Safety controls and devices function properly.
17. Interfaces with fire-alarm system function properly.
18. Electrical interlocks function properly.
19. Existing operator workstations and other interfaces are operable, all system and database software is installed, and graphic are created.
20. Record Drawings are completed.

C. Validation Test:

1. Verify operating performance of each I/O point in DDC system.
 - a. Verify analog I/O points at operating value.
 - b. Make adjustments to out-of-tolerance I/O points.
 - 1) Identify I/O points for future reference.
 - 2) Simulate abnormal conditions to demonstrate proper function of safety devices.
 - 3) Identify existing instruments and controllers that cannot maintain performance indicated after adjustments.
2. Simulate conditions to demonstrate proper sequence of control.
3. Readjust settings to design values and observe ability of DDC system to establish desired conditions.

3.15 ADJUSTING

- A. Occupancy Adjustments: When requested within 12 months from date of Substantial Completion, provide on-site assistance in adjusting system to suit actual occupied conditions. Provide up to two visits to Project during other-than-normal occupancy hours for this purpose.

3.16 SOFTWARE SERVICE AGREEMENT

- A. Technical Support: Beginning at Substantial Completion, service agreement shall include software support for 2 year(s).

3.17 DEMONSTRATION

- A. Engage a factory-authorized service representative with complete knowledge of Project-specific system installed to train Owner's maintenance personnel to adjust, operate, and maintain DDC system.
- B. Extent of Training:
 - 1. Base extent of training on scope and complexity of DDC system indicated and training requirements indicated. Provide extent of training required to satisfy requirements indicated even if more than minimum training requirements are indicated.
 - 2. Inform Owner of anticipated training requirements if more than minimum training requirements are indicated.
 - 3. Minimum Training Requirements:
 - a. Provide not less than one day of training total.
 - b. Stagger training over multiple training classes to accommodate Owner's requirements. All training shall occur before end of warranty period.
 - c. Total days of training shall be broken into not more than two separate training classes.
 - d. Each training class shall be not less than one consecutive day(s).
- C. Training Schedule:
 - 1. Schedule training to provide Owner with at least 10 business days of notice in advance of training.
 - 2. Training shall occur within normal business hours at a mutually agreed on time. Unless otherwise agreed to, training shall occur Monday through Friday, except on U.S. Federal holidays,
 - 3. If requested, provide staggered training schedule as requested by Owner.
- D. Training Attendee List and Sign-in Sheet:
 - 1. Request from Owner in advance of training a proposed attendee list with name, phone number and e-mail address.
- E. Training Attendee Headcount:
 - 1. Plan in advance of training for two attendees.
 - 2. Make allowance for Owner to add up to one attendee(s) at time of training.
 - 3. Headcount may vary depending on training content covered in session. Attendee access may be restricted to some training content for purposes of maintaining system security.
- F. Training Attendee Prior Knowledge: For guidance in planning required training and instruction, assume attendees have the following:
 - 1. Intermediate user knowledge of computers and office applications.
 - 2. Basic knowledge of HVAC systems.
 - 3. Basic knowledge of DDC systems.
 - 4. Basic knowledge of DDC system and products installed.

G. Attendee Training Manuals:

1. Provide each attendee with a color hard copy of all training materials and visual presentations.
2. In addition to hard-copy materials included in training manual, provide a DVD or flash drive with PDF copy of all hard-copy materials.

H. Instructor Requirements:

1. One or multiple qualified instructors, as required, to provide training.

I. Organization of Training Sessions:

1. Organize training sessions into logical groupings of technical content and to reflect different levels of operators having access to system. Plan training sessions to accommodate the following three levels of operators:
 - a. Daily operators.
 - b. Advanced operators.
 - c. System managers and administrators.
2. Plan and organize training sessions to group training content to protect DDC system security. Some attendees may be restricted to some training sessions that cover restricted content for purposes of maintaining DDC system security.

J. On-Site Training:

1. Owner will provide conditioned classroom or workspace with ample desks or tables, chairs, power and data connectivity for instructor and each attendee.
2. Provide as much of training located on-site as deemed feasible and practical by Owner.
3. Existing operator workstation shall be used in training.

K. Training Content for Daily Operators:

1. Basic operation of system.
2. Understanding DDC system architecture and configuration.
3. Operating operator workstations, printers and other peripherals.
4. Logging on and off system.
5. Accessing graphics, reports and alarms.
6. Adjusting and changing set points and time schedules.
7. Recognizing DDC system malfunctions.
8. Understanding content of operation and maintenance manuals including control drawings.
9. Understanding physical location and placement of DDC controllers and I/O hardware.
10. Accessing data from DDC controllers.
11. Running each specified report and log.
12. Displaying and demonstrating each data entry to show Project-specific customizing capability. Demonstrating parameter changes.
13. Stepping through graphics penetration tree, displaying all graphics, demonstrating dynamic updating, and direct access to graphics.
14. Executing digital and analog commands in graphic mode.

15. Demonstrating scan, update, and alarm responsiveness.
 16. Demonstrating on-line user guide, and help function and mail facility.
 17. Demonstrating the following for HVAC systems and equipment controlled by DDC system:
 - a. Operation of HVAC equipment in normal-off, -on and failed conditions while observing individual equipment, dampers and valves for correct position under each condition.
 - b. For HVAC equipment with factory-installed software, show that integration into DDC system is able to communicate with DDC controllers or gateways, as applicable.
 - c. Using graphed trends, show that sequence of operation is executed in correct manner, and HVAC systems operate properly through complete sequence of operation including seasonal change, occupied and unoccupied modes, warm-up and cool-down cycles and other modes of operation indicated.
 - d. Hardware interlocks and safeties function properly and DDC system performs correct sequence of operation after electrical power interruption and resumption after power is restored.
 - e. Reporting of alarm conditions for each alarm, and confirm that alarms are received at assigned locations, including operator workstations.
 - f. Each control loop responds to set point adjustment and stabilizes within time period indicated.
 - g. Sharing of previously graphed trends of all control loops to demonstrate that each control loop is stable and set points are being maintained.
- L. Video of Training Sessions:
1. Provide Owner with two copies of digital files on DVDs or flash drives for later reference and for use in future training.
 2. Owner retains right to make additional copies for intended training purposes without having to pay royalties.

END OF SECTION 230923

SECTION 231123 - FACILITY NATURAL-GAS PIPING

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section Includes:
 - 1. Pipes, tubes, and fittings.
 - 2. Piping specialties.
 - 3. Piping and tubing joining materials.
 - 4. Valves.

1.3 DEFINITIONS

- A. Finished Spaces: Spaces other than mechanical and electrical equipment rooms, furred spaces, pipe and duct shafts, unheated spaces immediately below roof, spaces above ceilings, unexcavated spaces, crawlspaces, and tunnels.
- B. Exposed, Interior Installations: Exposed to view indoors. Examples include finished occupied spaces and mechanical equipment rooms.
- C. Exposed, Exterior Installations: Exposed to view outdoors or subject to outdoor ambient temperatures and weather conditions. Examples include rooftop locations.

1.4 PERFORMANCE REQUIREMENTS

- A. Minimum Operating-Pressure Ratings:
 - 1. Piping and Valves: 100 psig minimum unless otherwise indicated.
- B. Natural-Gas System Pressure within Buildings: 0.5 psig or less.

1.5 ACTION SUBMITTALS

- A. Product Data: For each type of the following:
 - 1. Piping specialties.
 - 2. Valves. Include pressure rating, capacity, settings, and electrical connection data of selected models.

1.6 INFORMATIONAL SUBMITTALS

- A. Site Survey: Plans, drawn to scale, on which natural-gas piping is shown and coordinated with other services and utilities.
- B. Welding certificates.
- C. Field quality-control reports.

1.7 QUALITY ASSURANCE

- A. Steel Support Welding Qualifications: Qualify procedures and personnel according to AWS D1.1/D1.1M, "Structural Welding Code - Steel."
- B. Pipe Welding Qualifications: Qualify procedures and operators according to ASME Boiler and Pressure Vessel Code.

1.8 DELIVERY, STORAGE, AND HANDLING

- A. Deliver pipes and tubes with factory-applied end caps. Maintain end caps through shipping, storage, and handling to prevent pipe end damage and to prevent entrance of dirt, debris, and moisture.

1.9 PROJECT CONDITIONS

- A. Perform site survey, research public utility records, and verify existing utility locations. Contact utility-locating service for area where Project is located.

PART 2 - PRODUCTS

2.1 PIPES, TUBES, AND FITTINGS

- A. Steel Pipe: ASTM A 53/A 53M, black steel, Schedule 40, Type E or S, Grade B.
 - 1. Malleable-Iron Threaded Fittings: ASME B16.3, Class 150, standard pattern.
 - 2. Wrought-Steel Welding Fittings: ASTM A 234/A 234M for butt welding and socket welding.
 - 3. Unions: ASME B16.39, Class 150, malleable iron with brass-to-iron seat, ground joint, and threaded ends.

2.2 PIPING SPECIALTIES

- A. T-Pattern Strainers:
 - 1. Body: Ductile or malleable iron with removable access coupling and end cap for strainer maintenance.
 - 2. End Connections: Grooved ends.
 - 3. Strainer Screen: 60-mesh startup strainer, and perforated stainless-steel basket with 57 percent free area.
 - 4. CWP Rating: 750 psig.

2.3 JOINING MATERIALS

- A. Joint Compound and Tape: Suitable for natural gas.
- B. Welding Filler Metals: Comply with AWS D10.12/D10.12M for welding materials appropriate for wall thickness and chemical analysis of steel pipe being welded.

2.4 MANUAL GAS SHUTOFF VALVES

- A. See "Aboveground Manual Gas Shutoff Valve Schedule" Articles for where each valve type is applied in various services.
- B. General Requirements for Metallic Valves, NPS 2 and Smaller: Comply with ASME B16.33.
 - 1. CWP Rating: 125 psig.
 - 2. Threaded Ends: Comply with ASME B1.20.1.
 - 3. Dryseal Threads on Flare Ends: Comply with ASME B1.20.3.
 - 4. Tamperproof Feature: Locking feature for valves indicated in "Underground Manual Gas Shutoff Valve Schedule" and "Aboveground Manual Gas Shutoff Valve Schedule" Articles.
 - 5. Listing: Listed and labeled by an NRTL acceptable to authorities having jurisdiction for valves 1 inch and smaller.
 - 6. Service Mark: Valves 1-1/4 inches to NPS 2 shall have initials "WOG" permanently marked on valve body.
- C. General Requirements for Metallic Valves, NPS 2-1/2 and Larger: Comply with ASME B16.38.
 - 1. CWP Rating: 125 psig.
 - 2. Flanged Ends: Comply with ASME B16.5 for steel flanges.
 - 3. Tamperproof Feature: Locking feature for valves indicated in "Underground Manual Gas Shutoff Valve Schedule" and "Aboveground Manual Gas Shutoff Valve Schedule" Articles.
 - 4. Service Mark: Initials "WOG" shall be permanently marked on valve body.
 - 5. Manufacturers: Subject to compliance with requirements, provide products by one of the following:
 - a. BrassCraft Manufacturing Company; a Masco company.
 - b. Conbraco Industries, Inc.; Apollo Div.
 - c. Lyall, R. W. & Company, Inc.
 - d. McDonald, A. Y. Mfg. Co.
 - e. Perfection Corporation; a subsidiary of American Meter Company.
 - 6. CWP Rating: 600 psig.
 - 7. Listing: Valves NPS 1 and smaller shall be listed and labeled by an NRTL acceptable to authorities having jurisdiction.
- D. Bronze Plug Valves: MSS SP-78.
 - 1. Manufacturers: Subject to compliance with requirements, provide products by one of the following:
 - a. Lee Brass Company.
 - b. McDonald, A. Y. Mfg. Co.
 - 2. Body: Bronze, complying with ASTM B 584.
 - 3. Plug: Bronze.
 - 4. Ends: Threaded, socket, or flanged as indicated in "Underground Manual Gas Shutoff Valve Schedule" and "Aboveground Manual Gas Shutoff Valve Schedule" Articles.

5. Operator: Square head or lug type with tamperproof feature where indicated.
6. Pressure Class: 125 psig.
7. Listing: Valves NPS 1 and smaller shall be listed and labeled by an NRTL acceptable to authorities having jurisdiction.
8. Service: Suitable for natural-gas service with "WOG" indicated on valve body.
9. Manufacturers: Subject to compliance with requirements, provide products by one of the following:
 - a. Flowserve.
 - b. Homestead Valve; a division of Olson Technologies, Inc.
 - c. McDonald, A. Y. Mfg. Co.
 - d. Milliken Valve Company.
 - e. Mueller Co.; Gas Products Div.
 - f. R&M Energy Systems, A Unit of Robbins & Myers, Inc.
10. Pressure Class: 125 psig.
11. Listing: Valves NPS 1 and smaller shall be listed and labeled by an NRTL acceptable to authorities having jurisdiction.

PART 3 - EXECUTION

3.1 EXAMINATION

- A. Examine roughing-in for natural-gas piping system to verify actual locations of piping connections before equipment installation.
- B. Proceed with installation only after unsatisfactory conditions have been corrected.

3.2 PREPARATION

- A. Inspect natural-gas piping according to NFPA 54 the International Fuel Gas Code to determine that natural-gas utilization devices are turned off in piping section affected.
- B. Comply with NFPA 54 the International Fuel Gas Code requirements for prevention of accidental ignition.

3.3 INDOOR PIPING INSTALLATION

- A. Comply with NFPA 54 the International Fuel Gas Code for installation and purging of natural-gas piping.
- B. Drawing plans, schematics, and diagrams indicate general location and arrangement of piping systems. Indicated locations and arrangements are used to size pipe and calculate friction loss, expansion, and other design considerations. Install piping as indicated unless deviations to layout are approved on Coordination Drawings.
- C. Arrange for pipe spaces, chases, slots, sleeves, and openings in building structure during progress of construction, to allow for mechanical installations.
- D. Install piping in concealed locations unless otherwise indicated and except in equipment rooms and service areas.

- E. Install piping indicated to be exposed and piping in equipment rooms and service areas at right angles or parallel to building walls. Diagonal runs are prohibited unless specifically indicated otherwise.
 - F. Install piping above accessible ceilings to allow sufficient space for ceiling panel removal.
 - G. Locate valves for easy access.
 - H. Install natural-gas piping at uniform grade of 2 percent down toward drip and sediment traps.
 - I. Install piping free of sags and bends.
 - J. Install fittings for changes in direction and branch connections.
 - K. Verify final equipment locations for roughing-in.
 - L. Comply with requirements in Sections specifying gas-fired appliances and equipment for roughing-in requirements.
 - M. Drips and Sediment Traps: Install drips at points where condensate may collect, including service-meter outlets. Locate where accessible to permit cleaning and emptying. Do not install where condensate is subject to freezing.
 - 1. Construct drips and sediment traps using tee fitting with bottom outlet plugged or capped. Use nipple a minimum length of 3 pipe diameters, but not less than 3 inches long and same size as connected pipe. Install with space below bottom of drip to remove plug or cap.
 - N. Conceal pipe installations in walls, pipe spaces, utility spaces, above ceilings, below grade or floors, and in floor channels unless indicated to be exposed to view.
 - O. Use eccentric reducer fittings to make reductions in pipe sizes. Install fittings with level side down.
 - P. Connect branch piping from top or side of horizontal piping.
 - Q. Install unions in pipes NPS 2 and smaller, adjacent to each valve, at final connection to each piece of equipment. Unions are not required at flanged connections.
 - R. Do not use natural-gas piping as grounding electrode.
 - S. Install strainer on inlet of each line-pressure regulator and automatic or electrically operated valve.
 - T. Install sleeves for piping penetrations of walls, ceilings, and floors.
 - U. Install sleeve seals for piping penetrations of concrete walls and slabs.
 - V. Install escutcheons for piping penetrations of walls, ceilings, and floors.
- 3.4 VALVE INSTALLATION
- A. Install manual gas shutoff valve for each gas appliance ahead of pipe union.
- 3.5 PIPING JOINT CONSTRUCTION
- A. Ream ends of pipes and tubes and remove burrs.

- B. Remove scale, slag, dirt, and debris from inside and outside of pipe and fittings before assembly.
- C. Threaded Joints:
 - 1. Thread pipe with tapered pipe threads complying with ASME B1.20.1.
 - 2. Cut threads full and clean using sharp dies.
 - 3. Ream threaded pipe ends to remove burrs and restore full inside diameter of pipe.
 - 4. Apply appropriate tape or thread compound to external pipe threads unless dryseal threading is specified.
 - 5. Damaged Threads: Do not use pipe or pipe fittings with threads that are corroded or damaged. Do not use pipe sections that have cracked or open welds.
- D. Welded Joints:
 - 1. Construct joints according to AWS D10.12/D10.12M, using qualified processes and welding operators.
 - 2. Bevel plain ends of steel pipe.

3.6 HANGER AND SUPPORT INSTALLATION

- A. Comply with requirements for pipe hangers and supports specified in Section 230529 "Hangers and Supports for HVAC Piping and Equipment."
- B. Install hangers for horizontal steel piping with the following maximum spacing and minimum rod sizes:
 - 1. NPS 1 and Smaller: Maximum span, 96 inches; minimum rod size, 3/8 inch.
 - 2. NPS 1-1/4: Maximum span, 108 inches; minimum rod size, 3/8 inch.
 - 3. NPS 1-1/2 and NPS 2: Maximum span, 108 inches; minimum rod size, 3/8 inch.

3.7 CONNECTIONS

- A. Install natural-gas piping electrically continuous, and bonded to gas appliance equipment grounding conductor of the circuit powering the appliance according to NFPA 70.
- B. Install piping adjacent to appliances to allow service and maintenance of appliances.
- C. Connect piping to appliances using manual gas shutoff valves and unions. Install valve within 72 inches of each gas-fired appliance and equipment. Install union between valve and appliances or equipment.
- D. Sediment Traps: Install tee fitting with capped nipple in bottom to form drip, as close as practical to inlet of each appliance.

3.8 LABELING AND IDENTIFYING

- A. Comply with requirements in Section 230553 "Identification for HVAC Piping and Equipment" for piping and valve identification.

3.9 FIELD QUALITY CONTROL

- A. Perform tests and inspections.

- B. Tests and Inspections:
 - 1. Test, inspect, and purge natural gas according to NFPA 54 the International Fuel Gas Code and authorities having jurisdiction.
 - C. Natural-gas piping will be considered defective if it does not pass tests and inspections.
 - D. Prepare test and inspection reports.
- 3.10 INDOOR PIPING SCHEDULE FOR SYSTEM PRESSURES LESS THAN 0.5 PSIG
- A. Aboveground, branch piping NPS 1 and smaller shall be the following:
 - 1. Steel pipe with malleable-iron fittings and threaded joints.
 - B. Aboveground, distribution piping shall be one of the following:
 - 1. Steel pipe with malleable-iron fittings and threaded joints.
 - 2. Steel pipe with wrought-steel fittings and welded joints.
- 3.11 INDOOR PIPING SCHEDULE FOR SYSTEM PRESSURES MORE THAN 0.5 PSIG AND LESS THAN 5 PSIG
- A. Aboveground, branch piping NPS 1 and smaller shall be the following:
 - 1. Steel pipe with malleable-iron fittings and threaded joints.
 - B. Aboveground, distribution piping shall be one of the following:
 - 1. Steel pipe with malleable-iron fittings and threaded joints.
 - 2. Steel pipe with steel welding fittings and welded joints.
- 3.12 ABOVEGROUND MANUAL GAS SHUTOFF VALVE SCHEDULE
- A. Distribution piping valves for pipe sizes NPS 2 and smaller shall be one of the following:
 - 1. Two-piece, full-port, bronze ball valves with bronze trim.
 - 2. Bronze plug valve.

END OF SECTION 231123

SECTION 232113 - HYDRONIC PIPING

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. This Section includes pipe and fitting materials, joining methods, special-duty valves, and specialties for the following:
 - 1. Hot-water heating piping.
 - 2. Reverse-osmosis humidifier makeup-water piping.
 - 3. Air-vent piping.

1.3 DEFINITIONS

- A. PTFE: Polytetrafluoroethylene.

1.4 PERFORMANCE REQUIREMENTS

- A. Hydronic piping components and installation shall be capable of withstanding the following minimum working pressure and temperature:
 - 1. Hot-Water Heating Piping: 100 psig at 200 deg F.
 - 2. Makeup-Water Piping: 80 psig at 150 deg F.
 - 3. Air-Vent Piping: 200 deg F.

1.5 QUALITY ASSURANCE

- A. Steel Support Welding: Qualify processes and operators according to AWS D1.1/D1.1M, "Structural Welding Code - Steel."
- B. ASME Compliance: Comply with ASME B31.9, "Building Services Piping," for materials, products, and installation. Safety valves and pressure vessels shall bear the appropriate ASME label. Fabricate and stamp air separators and expansion tanks to comply with ASME Boiler and Pressure Vessel Code: Section VIII, Division 1.

PART 2 - PRODUCTS

2.1 COPPER TUBE AND FITTINGS

- A. Drawn-Temper Copper Tubing: ASTM B 88, Type L.

- B. Annealed-Temper Copper Tubing: ASTM B 88, Type K.
- C. Wrought-Copper Fittings: ASME B16.22.
- D. Wrought-Copper Unions: ASME B16.22.

2.2 STEEL PIPE AND FITTINGS

- A. Steel Pipe: ASTM A 53/A 53M, black steel with plain ends; type, grade, and wall thickness as indicated in Part 3 "Piping Applications" Article.
- B. Malleable-Iron Threaded Fittings: ASME B16.3, Classes 150 and 300 as indicated in Part 3 "Piping Applications" Article.
- C. Malleable-Iron Unions: ASME B16.39; Classes 150, 250, and 300 as indicated in Part 3 "Piping Applications" Article.
- D. Cast-Iron Pipe Flanges and Flanged Fittings: ASME B16.1, Classes 25, 125, and 250; raised ground face, and bolt holes spot faced as indicated in Part 3 "Piping Applications" Article.
- E. Wrought-Steel Fittings: ASTM A 234/A 234M, wall thickness to match adjoining pipe.
- F. Wrought Cast- and Forged-Steel Flanges and Flanged Fittings: ASME B16.5, including bolts, nuts, and gaskets of the following material group, end connections, and facings:
 - 1. Material Group: 1.1.
 - 2. End Connections: Butt welding.
 - 3. Facings: Raised face.
- G. Steel Pipe Nipples: ASTM A 733, made of same materials and wall thicknesses as pipe in which they are installed.

2.3 JOINING MATERIALS

- A. Pipe-Flange Gasket Materials: Suitable for chemical and thermal conditions of piping system contents.
 - 1. ASME B16.21, nonmetallic, flat, asbestos free, 1/8-inch maximum thickness unless thickness or specific material is indicated.
- B. Flange Bolts and Nuts: ASME B18.2.1, carbon steel, unless otherwise indicated.
- C. Solder Filler Metals: ASTM B 32, lead-free alloys. Include water-flushable flux according to ASTM B 813.
- D. Brazing Filler Metals: AWS A5.8, BCuP Series, copper-phosphorus alloys for joining copper with copper; or BA9-1, silver alloy for joining copper with bronze or steel.
- E. Welding Filler Metals: Comply with AWS D10.12/D10.12M for welding materials appropriate for wall thickness and chemical analysis of steel pipe being welded.
- F. Gasket Material: Thickness, material, and type suitable for fluid to be handled and working temperatures and pressures.

2.4 DIELECTRIC FITTINGS

- A. General Requirements: Assembly of copper alloy and ferrous materials with separating nonconductive insulating material. Include end connections compatible with pipes to be joined.
- B. Dielectric Unions:
 - 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Capitol Manufacturing Company.
 - b. Central Plastics Company.
 - c. Hart Industries International, Inc.
 - d. Jomar International Ltd.
 - e. Matco-Norca, Inc.
 - f. McDonald, A. Y. Mfg. Co.
 - g. Watts Regulator Co.; a division of Watts Water Technologies, Inc.
 - h. Wilkins; a Zurn company.
 - 2. Description:
 - a. Standard: ASSE 1079.
 - b. Pressure Rating: 150 psig.
 - c. End Connections: Solder-joint copper alloy and threaded ferrous.
- C. Dielectric Flanges:
 - 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Capitol Manufacturing Company.
 - b. Central Plastics Company.
 - c. Matco-Norca, Inc.
 - d. Watts Regulator Co.; a division of Watts Water Technologies, Inc.
 - e. Wilkins; a Zurn company.
 - 2. Description:
 - a. Standard: ASSE 1079.
 - b. Factory-fabricated, bolted, companion-flange assembly.
 - c. Pressure Rating: 150 psig.
 - d. End Connections: Solder-joint copper alloy and threaded ferrous; threaded solder-joint copper alloy and threaded ferrous.
- D. Dielectric-Flange Insulating Kits:
 - 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Advance Products & Systems, Inc.
 - b. Calpico, Inc.
 - c. Central Plastics Company.
 - d. Pipeline Seal and Insulator, Inc.
 - 2. Description:

- a. Nonconducting materials for field assembly of companion flanges.
- b. Pressure Rating: 150 psig.
- c. Gasket: Neoprene or phenolic.
- d. Bolt Sleeves: Phenolic or polyethylene.
- e. Washers: Phenolic with steel backing washers.

PART 3 - EXECUTION

3.1 PIPING APPLICATIONS

- A. Hot-water heating piping, aboveground, NPS 2 and smaller, shall be any of the following:
 - 1. Type L, drawn-temper copper tubing, wrought-copper fittings, and soldered joints.
 - 2. Schedule 40 steel pipe; Class 150, malleable-iron fittings; cast-iron flanges and flange fittings; and threaded joints.
- B. Hot-water heating piping, aboveground, NPS 2-1/2 and larger, shall be any of the following:
 - 1. Schedule 40 steel pipe, wrought-steel fittings and wrought-cast or forged-steel flanges and flange fittings, and welded and flanged joints.
 - 2. Schedule 40 steel pipe; grooved, mechanical joint coupling and fittings; and grooved, mechanical joints.
- C. Reverse-osmosis humidifier makeup water shall be the following:
 - 1. Schedule 40 PVC with solvent welded joints.
- D. Air-Vent Piping:
 - 1. Inlet: Same as service where installed with metal-to-plastic transition fittings for plastic piping systems according to the piping manufacturer's written instructions.
 - 2. Outlet: Type L, annealed-temper copper tubing with soldered or flared joints.

3.2 VALVE APPLICATIONS

- A. Install shutoff-duty valves at each branch connection to supply mains, and at supply connection to each piece of equipment.
- B. Install calibrated-orifice, balancing valves at each branch connection to return main.
- C. Install calibrated-orifice, balancing valves in the return pipe of each heating or cooling terminal.

3.3 PIPING INSTALLATIONS

- A. Drawing plans, schematics, and diagrams indicate general location and arrangement of piping systems. Indicate piping locations and arrangements if such were used to size pipe and calculate friction loss, expansion, pump sizing, and other design considerations. Install piping as indicated unless deviations to layout are approved on Coordination Drawings.
- B. Install piping in concealed locations, unless otherwise indicated and except in equipment rooms and service areas.

- C. Install piping indicated to be exposed and piping in equipment rooms and service areas at right angles or parallel to building walls. Diagonal runs are prohibited unless specifically indicated otherwise.
- D. Install piping above accessible ceilings to allow sufficient space for ceiling panel removal.
- E. Install piping to permit valve servicing.
- F. Install piping at indicated slopes.
- G. Install piping free of sags and bends.
- H. Install fittings for changes in direction and branch connections.
- I. Install piping to allow application of insulation.
- J. Select system components with pressure rating equal to or greater than system operating pressure.
- K. Install groups of pipes parallel to each other, spaced to permit applying insulation and servicing of valves.
- L. Install drains, consisting of a tee fitting, NPS 3/4 ball valve, and short NPS 3/4 threaded nipple with cap, at low points in piping system mains and elsewhere as required for system drainage.
- M. Install piping at a uniform grade of 0.2 percent upward in direction of flow.
- N. Reduce pipe sizes using eccentric reducer fitting installed with level side up.
- O. Install valves according to Section 230523 "General-Duty Valves for HVAC Piping."
- P. Install unions in piping, NPS 2 and smaller, adjacent to valves, at final connections of equipment, and elsewhere as indicated.
- Q. Install flanges in piping, NPS 2-1/2 and larger, at final connections of equipment and elsewhere as indicated.
- R. Install strainers on inlet side of each control valve, pressure-reducing valve, solenoid valve, and elsewhere as indicated. Install NPS 3/4 nipple and ball valve in blowdown connection of strainers NPS 2 and larger. Match size of strainer blowoff connection for strainers smaller than NPS 2.
- S. Identify piping as specified in Section 230553 "Identification for HVAC Piping and Equipment."

3.4 HANGERS AND SUPPORTS

- A. Comply with requirements in Section 230529 "Hangers and Supports for HVAC Piping and Equipment" for hanger, support, and anchor devices. Comply with the following requirements for maximum spacing of supports.
- B. Install the following pipe attachments:
 - 1. Adjustable steel clevis hangers for individual horizontal piping less than 20 feet long.
 - 2. Adjustable roller hangers and spring hangers for individual horizontal piping 20 feet or longer.
 - 3. Pipe Roller: MSS SP-58, Type 44 for multiple horizontal piping 20 feet or longer, supported on a trapeze.
 - 4. Spring hangers to support vertical runs.

- C. Install hangers for steel piping with the following maximum spacing and minimum rod sizes:
1. NPS 3/4: Maximum span, 7 feet; minimum rod size, 1/4 inch.
 2. NPS 1: Maximum span, 7 feet; minimum rod size, 1/4 inch.
 3. NPS 1-1/2: Maximum span, 9 feet; minimum rod size, 3/8 inch.
 4. NPS 2: Maximum span, 10 feet; minimum rod size, 3/8 inch.
 5. NPS 2-1/2: Maximum span, 11 feet; minimum rod size, 3/8 inch.
 6. NPS 3: Maximum span, 12 feet; minimum rod size, 3/8 inch.
 7. NPS 4: Maximum span, 14 feet; minimum rod size, 1/2 inch.
 8. NPS 6: Maximum span, 17 feet; minimum rod size, 1/2 inch.
 9. NPS 8: Maximum span, 19 feet; minimum rod size, 5/8 inch.
- D. Install hangers for drawn-temper copper piping with the following maximum spacing and minimum rod sizes:
1. NPS 3/4: Maximum span, 5 feet; minimum rod size, 1/4 inch.
 2. NPS 1: Maximum span, 6 feet; minimum rod size, 1/4 inch.
 3. NPS 1-1/2: Maximum span, 8 feet; minimum rod size, 3/8 inch.
 4. NPS 2: Maximum span, 8 feet; minimum rod size, 3/8 inch.

3.5 PIPE JOINT CONSTRUCTION

- A. Ream ends of pipes and tubes and remove burrs. Bevel plain ends of steel pipe.
- B. Remove scale, slag, dirt, and debris from inside and outside of pipe and fittings before assembly.
- C. Soldered Joints: Apply ASTM B 813, water-flushable flux, unless otherwise indicated, to tube end. Construct joints according to ASTM B 828 or CDA's "Copper Tube Handbook," using lead-free solder alloy complying with ASTM B 32.
- D. Threaded Joints: Thread pipe with tapered pipe threads according to ASME B1.20.1. Cut threads full and clean using sharp dies. Ream threaded pipe ends to remove burrs and restore full ID. Join pipe fittings and valves as follows:
1. Apply appropriate tape or thread compound to external pipe threads unless dry seal threading is specified.
 2. Damaged Threads: Do not use pipe or pipe fittings with threads that are corroded or damaged. Do not use pipe sections that have cracked or open welds.
- E. Welded Joints: Construct joints according to AWS D10.12/D10.12M, using qualified processes and welding operators according to Part 1 "Quality Assurance" Article.
- F. Flanged Joints: Select appropriate gasket material, size, type, and thickness for service application. Install gasket concentrically positioned. Use suitable lubricants on bolt threads.

3.6 TERMINAL EQUIPMENT CONNECTIONS

- A. Sizes for supply and return piping connections shall be the same as or larger than equipment connections.
- B. Install control valves in accessible locations close to connected equipment.
- C. Install ports for pressure gages and thermometers at coil inlet and outlet connections according to Section 230519 "Meters and Gages for HVAC Piping."

BLOOMINGTON PUBLIC LIBRARY
HEATING UPGRADES

PROJECT NO. 0131113.00

END OF SECTION 23 2113

SECTION 232116 - HYDRONIC PIPING SPECIALTIES

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section includes specialties for the following:
 - 1. Hot-water heating piping.
 - 2. Makeup-water piping.
 - 3. Air-vent piping.

1.3 ACTION SUBMITTALS

- A. Product Data: For each type of the following:
 - 1. Air-control devices.
 - 2. Hydronic specialties.

1.4 CLOSEOUT SUBMITTALS

- A. Operation and Maintenance Data: For air-control devices, hydronic specialties, and special-duty valves to include in emergency, operation, and maintenance manuals.

PART 2 - PRODUCTS

2.1 PERFORMANCE REQUIREMENTS

- A. Hydronic piping components and installation shall be capable of withstanding the following minimum working pressure and temperature unless otherwise indicated:
 - 1. Hot-Water Heating Piping: 100 psig at 200 deg F.
 - 2. Makeup-Water Piping: 80 psig at 150 deg F.
 - 3. Air-Vent Piping: 200 deg F.

2.2 VALVES

- A. Ball, and Butterfly Valves: Comply with requirements specified in Section 230523 "General-Duty Valves for HVAC Piping."Section 15112 "General-Duty Valves for HVAC Piping."

- B. Automatic Temperature-Control Valves, Actuators, and Sensors: Comply with requirements specified in Section 230900 "Instrumentation and Control for HVAC."Section 15900 "HVAC Instrumentation and Controls."
- C. Bronze, Calibrated-Orifice, Balancing Valves:
 - 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Armstrong Pumps, Inc.
 - b. Bell & Gossett Domestic Pump.
 - c. Taco.
 - 2. Body: Bronze, ball or plug type with calibrated orifice or venturi.
 - 3. Ball: Brass or stainless steel.
 - 4. Seat: PTFE.
 - 5. End Connections: Threaded or socket.
 - 6. Pressure Gage Connections: Integral seals for portable differential pressure meter.
 - 7. Handle Style: Lever, with memory stop to retain set position.
 - 8. CWP Rating: Minimum 125 psig.
 - 9. Maximum Operating Temperature: 250 deg F.
- D. Cast-Iron or Steel, Calibrated-Orifice, Balancing Valves:
 - 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Armstrong Pumps, Inc.
 - b. Taco.
 - c. Tour & Andersson; available through Victaulic Company.
 - 2. Body: Cast-iron or steel body, ball, plug, or globe pattern with calibrated orifice or venturi.
 - 3. Ball: Brass or stainless steel.
 - 4. Stem Seals: EPDM O-rings.
 - 5. Disc: Glass and carbon-filled PTFE.
 - 6. Seat: PTFE.
 - 7. End Connections: Flanged or grooved.
 - 8. Pressure Gage Connections: Integral seals for portable differential pressure meter.
 - 9. Handle Style: Lever, with memory stop to retain set position.
 - 10. CWP Rating: Minimum 125 psig.
 - 11. Maximum Operating Temperature: 250 deg F.

2.3 AIR-CONTROL DEVICES

- A. Manual Air Vents:
 - 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Amtrol, Inc.
 - b. Armstrong Pumps, Inc.
 - c. Bell & Gossett Domestic Pump.
 - d. Taco, Inc.

2. Body: Bronze.
3. Internal Parts: Nonferrous.
4. Operator: Screwdriver or thumbscrew.
5. Inlet Connection: NPS 1/2.
6. Discharge Connection: NPS 1/8.
7. CWP Rating: 150 psig.
8. Maximum Operating Temperature: 225 deg F.

B. Automatic Air Vents:

1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - a. Amtrol, Inc.
 - b. Armstrong Pumps, Inc.
 - c. Bell & Gossett Domestic Pump.
 - d. Taco, Inc.
2. Body: Bronze or cast iron.
3. Internal Parts: Nonferrous.
4. Operator: Noncorrosive metal float.
5. Inlet Connection: NPS 1/2.
6. Discharge Connection: NPS 1/4.
7. CWP Rating: 150 psig.
8. Maximum Operating Temperature: 240 deg F.

2.4 HYDRONIC PIPING SPECIALTIES

A. Y-Pattern Strainers:

1. Body: ASTM A 126, Class B, cast iron with bolted cover and bottom drain connection.
2. End Connections: Threaded ends for NPS 2 and smaller; flanged ends for NPS 2-1/2 and larger.
3. Strainer Screen: Stainless-steel, 40-mesh strainer, or perforated stainless-steel basket.
4. CWP Rating: 125 psig.

PART 3 - EXECUTION

3.1 HYDRONIC SPECIALTIES INSTALLATION

- A. Install manual air vents at high points in piping, at heat-transfer coils, and elsewhere as required for system air venting.
- B. Install automatic air vents at high points of system piping in mechanical equipment rooms only. Install manual vents at heat-transfer coils and elsewhere as required for air venting.

END OF SECTION 232116

SECTION 232213 - STEAM AND CONDENSATE HEATING PIPING

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section includes pipe and fittings for LP steam and condensate piping:
- B. Related Requirements:

1.3 QUALITY ASSURANCE

- A. Steel Support Welding: Qualify procedures and personnel according to AWS D1.1/D1.1M, "Structural Welding Code - Steel."
- B. Pipe Welding: Qualify procedures and operators according to the following:
 - 1. ASME Compliance: Comply with ASME B31.9, "Building Services Piping," for materials, products, and installation.
 - 2. Certify that each welder has passed AWS qualification tests for welding processes involved and that certification is current.

PART 2 - PRODUCTS

2.1 STEEL PIPE AND FITTINGS

- A. Steel Pipe: ASTM A 53/A 53M, black steel, plain ends, welded and seamless, Grade B, and Schedule as indicated in piping applications articles.
- B. Cast-Iron Threaded Fittings: ASME B16.4; Classes 125, 150, and 300 as indicated in piping applications articles.
- C. Malleable-Iron Threaded Fittings: ASME B16.3; Classes 150 and 300 as indicated in piping applications articles.
- D. Malleable-Iron Unions: ASME B16.39; Classes 150, 250, and 300 as indicated in piping applications articles.
- E. Cast-Iron Threaded Flanges and Flanged Fittings: ASME B16.1, Classes 125 and 250 as indicated in piping applications articles; raised ground face, and bolt holes spot faced.

- F. Wrought-Steel Fittings: ASTM A 234/A 234M, wall thickness to match adjoining pipe.
- G. Wrought-Steel Flanges and Flanged Fittings: ASME B16.5, including bolts, nuts, and gaskets of the following material group, end connections, and facings:
 - 1. Material Group: 1.1.
 - 2. End Connections: Butt welding.
 - 3. Facings: Raised face.
- H. Steel Pipe Nipples: ASTM A 733, made of ASTM A 53/A 53M, black steel of same Type, Grade, and Schedule as pipe in which installed.

2.2 JOINING MATERIALS

- A. Pipe-Flange Gasket Materials: Suitable for chemical and thermal conditions of piping system contents.
 - 1. ASME B16.21, nonmetallic, flat, asbestos free, 1/8-inch (3.2-mm) maximum thickness unless otherwise indicated.
 - a. Full-Face Type: For flat-face, Class 125, cast-iron and cast-bronze flanges.
 - b. Narrow-Face Type: For raised-face, Class 250, cast-iron and steel flanges.
- B. Flange Bolts and Nuts: ASME B18.2.1, carbon steel, unless otherwise indicated.
- C. Welding Filler Metals: Comply with AWS D10.12M/D10.12 for welding materials appropriate for wall thickness and chemical analysis of steel pipe being welded.
- D. Welding Materials: Comply with Section II, Part C, of ASME Boiler and Pressure Vessel Code for welding materials appropriate for wall thickness and for chemical analysis of pipe being welded.

PART 3 - EXECUTION

3.1 LP STEAM PIPING APPLICATIONS

- A. LP Steam Piping, NPS 2 (DN 50) and Smaller: Schedule 40, Type S, Grade B, steel pipe; Class 125 cast-iron fittings; and threaded joints.
- B. LP Steam Piping, NPS 2-1/2 through NPS 12 (DN 65 through DN 300): Schedule 40, Type E, Grade B, steel pipe; Class 150 wrought-steel fittings, flanges, and flange fittings; and welded and flanged joints.
- C. Condensate piping above grade, NPS 2 (DN 50) and smaller, shall be the following:
 - 1. Schedule 80, Type S, Grade B, steel pipe; Class 125 cast-iron fittings; and threaded joints.

3.2 ANCILLARY PIPING APPLICATIONS

- A. Blowdown-Drain Piping: Same materials and joining methods as for piping specified for the service in which blowdown drain is installed.
- B. Vacuum-Breaker Piping: Outlet, same as service where installed.
- C. Safety-Valve-Inlet and -Outlet Piping: Same materials and joining methods as for piping specified for the service in which safety valve is installed.

3.3 PIPING INSTALLATION

- A. Drawing plans, schematics, and diagrams indicate general location and arrangement of piping systems. Install piping as indicated unless deviations to layout are approved on Coordination Drawings.
- B. Install piping indicated to be exposed and piping in equipment rooms and service areas at right angles or parallel to building walls. Diagonal runs are prohibited unless otherwise indicated.
- C. Install piping to permit valve servicing.
- D. Install piping free of sags and bends.
- E. Install fittings for changes in direction and branch connections.
- F. Install piping to allow application of insulation.
- G. Select system components with pressure rating equal to or greater than system operating pressure.
- H. Install groups of pipes parallel to each other, spaced to permit applying insulation and servicing of valves.
- I. Install drains, consisting of a tee fitting, NPS 3/4 (DN 20) full port-ball valve, and short NPS 3/4 (DN 20) threaded nipple with cap, at low points in piping system mains and elsewhere as required for system drainage.
- J. Install steam supply piping at a minimum uniform grade of 0.2 percent downward in direction of steam flow.
- K. Install condensate return piping at a minimum uniform grade of 0.4 percent downward in direction of condensate flow.
- L. Reduce pipe sizes using eccentric reducer fitting installed with level side down.
- M. Install valves according to Section 230523 "General-Duty Valves for HVAC Piping,"
- N. Install unions in piping, NPS 2 (DN 50) and smaller, adjacent to valves, at final connections of equipment, and elsewhere as indicated.

- O. Install flanges in piping, NPS 2-1/2 (DN 65) and larger, at final connections of equipment and elsewhere as indicated.
- P. Install shutoff valve immediately upstream of each dielectric fitting.
- Q. Install strainers on supply side of control valves, pressure-reducing valves, traps, and elsewhere as indicated. Install NPS 3/4 (DN 20) nipple and full port ball valve in blowdown connection of strainers NPS 2 (DN 50) and larger. Match size of strainer blowoff connection for strainers smaller than NPS 2 (DN 50).
- R. Comply with requirements in Section 230553 "Identification for HVAC Piping and Equipment" for identifying piping.
- S. Install drip legs at low points and natural drainage points such as ends of mains, bottoms of risers, and ahead of pressure regulators, and control valves.

3.4 HANGERS AND SUPPORTS

- A. Comply with requirements in Section 230529 "Hangers and Supports for HVAC Piping and Equipment" for installation of hangers and supports. Comply with requirements below for maximum spacing.
- B. Install the following pipe attachments:
 - 1. Adjustable steel clevis hangers for individual horizontal piping less than 20 feet (6 m) long.
 - 2. Spring hangers to support vertical runs.

3.5 PIPE JOINT CONSTRUCTION

- A. Ream ends of pipes and remove burrs. Bevel plain ends of steel pipe.
- B. Remove scale, slag, dirt, and debris from inside and outside of pipe and fittings before assembly.
- C. Threaded Joints: Thread pipe with tapered pipe threads according to ASME B1.20.1. Cut threads full and clean using sharp dies. Ream threaded pipe ends to remove burrs and restore full ID. Join pipe fittings and valves as follows:
 - 1. Apply appropriate tape or thread compound to external pipe threads unless dry seal threading is specified.
 - 2. Damaged Threads: Do not use pipe or pipe fittings with threads that are corroded or damaged. Do not use pipe sections that have cracked or open welds.
- D. Welded Joints: Construct joints according to AWS D10.12M/D10.12, using qualified processes and welding operators according to "Quality Assurance" Article.
- E. Flanged Joints: Select appropriate gasket material, size, type, and thickness for service application. Install gasket concentrically positioned. Use suitable lubricants on bolt threads.

3.6 FIELD QUALITY CONTROL

- A. Prepare steam and condensate piping according to ASME B31.9, "Building Services Piping," and as follows:
 - 1. Leave joints, including welds, uninsulated and exposed for examination during test.
 - 2. Provide temporary restraints for expansion joints that cannot sustain reactions due to test pressure. If temporary restraints are impractical, isolate expansion joints from testing.
 - 3. Flush system with clean water. Clean strainers.
 - 4. Isolate equipment from piping. If a valve is used to isolate equipment, its closure shall be capable of sealing against test pressure without damage to valve. Install blinds in flanged joints to isolate equipment.
- B. Testing Agency: Engage a qualified testing agency to perform tests and inspections.
- C. Manufacturer's Field Service: Engage a factory-authorized service representative to test and inspect components, assemblies, and equipment installations, including connections.
- D. Perform the following tests and inspections:
 - 1. Use ambient temperature water as a testing medium unless there is risk of damage due to freezing. Another liquid that is safe for workers and compatible with piping may be used.
 - 2. Subject piping system to hydrostatic test pressure that is not less than 1.5 times the working pressure. Test pressure shall not exceed maximum pressure for any vessel, pump, valve, or other component in system under test. Verify that stress due to pressure at bottom of vertical runs does not exceed 90 percent of specified minimum yield strength.
 - 3. After hydrostatic test pressure has been applied for at least 10 minutes, examine piping, joints, and connections for leakage. Eliminate leaks by tightening, repairing, or replacing components, and repeat hydrostatic test until there are no leaks.
- E. Prepare test and inspection reports.

END OF SECTION 232213

SECTION 235100 - BREECHINGS, CHIMNEYS, AND STACKS

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. This Section includes the following:

- 1. Listed double-wall vents.

1.3 ACTION SUBMITTALS

- A. Product Data: For the following:

- 1. Special gas vents.

- B. Shop Drawings: For vents, breechings, chimneys, and stacks. Include plans, elevations, sections, details, and attachments to other work.

- 1. Detail equipment assemblies and indicate dimensions, weights, loads, required clearances, methods of field assembly, components, hangers and seismic restraints, and location and size of each field connection.

1.4 QUALITY ASSURANCE

- A. Source Limitations: Obtain listed system components through one source from a single manufacturer.
- B. Welding: Qualify procedures and personnel according to AWS D1.1/D1.1M, "Structural Welding Code--Steel," for hangers and supports and AWS D9.1/D9.1M, "Sheet Metal Welding Code," for shop and field welding of joints and seams in vents, breechings, and stacks.
- C. Certified Sizing Calculations: Manufacturer shall certify venting system sizing calculations.

1.5 COORDINATION

- A. Coordinate installation of roof curbs, equipment supports, and roof penetrations. These items are specified in Section 077200 "Roof Accessories."

PART 2 - PRODUCTS

2.1 LISTED SPECIAL GAS VENTS

- A. Available Manufacturers: Subject to compliance with requirements, manufacturers offering products that may be incorporated into the Work include, but are not limited to, the following:
 - 1. Heat-Fab, Inc.
 - 2. Metal-Fab, Inc.
 - 3. Selkirk Inc.; Selkirk Metalbestos and Air Mate.
- B. Description: Double-wall metal vents tested according to UL 1738 and rated for 480 deg F continuously, with positive or negative flue pressure complying with NFPA 211.
- C. Construction: Inner shell and outer jacket separated by at least a 1/2-inch airspace.
- D. Inner Shell: ASTM A 959, Type 29-4C stainless steel.
- E. Outer Jacket: Stainless steel.
- F. Accessories: Tees, elbows, increasers, draft-hood connectors, terminations, adjustable roof flashings, storm collars, support assemblies, thimbles, firestop spacers, and fasteners; fabricated from similar materials and designs as vent-pipe straight sections; all listed for same assembly.
 - 1. Termination: Exit cone with drain section incorporated into riser.

PART 3 - EXECUTION

3.1 EXAMINATION

- A. Examine areas and conditions for compliance with requirements for installation tolerances and other conditions affecting performance of work.
 - 1. Proceed with installation only after unsatisfactory conditions have been corrected.

3.2 APPLICATION

- A. Listed Special Gas Vent: Condensing gas appliances.

3.3 INSTALLATION OF LISTED VENTS AND CHIMNEYS

- A. Locate to comply with minimum clearances from combustibles and minimum termination heights according to product listing or NFPA 211, whichever is most stringent.
- B. Support vents at intervals recommended by manufacturer to support weight of vents and all accessories, without exceeding appliance loading.
- C. Lap joints in direction of flow.

3.4 CLEANING

- A. After completing system installation, including outlet fittings and devices, inspect exposed finish. Remove burrs, dirt, and construction debris and repair damaged finishes.

- B. Clean breechings internally, during and after installation, to remove dust and debris. Clean external surfaces to remove welding slag and mill film. Grind welds smooth and apply touchup finish to match factory or shop finish.
- C. Provide temporary closures at ends of breechings, chimneys, and stacks that are not completed or connected to equipment.

END OF SECTION 15550

SECTION 235216 - CONDENSING BOILERS

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. This Section includes packaged, factory-fabricated and -assembled, gas-fired, condensing boilers, trim, and accessories for generating hot water.

1.3 SUBMITTALS

- A. Product Data: Include performance data, operating characteristics, furnished specialties, and accessories.
- B. Shop Drawings: For boilers, boiler trim, and accessories. Include plans, elevations, sections, details, and attachments to other work.
 - 1. Wiring Diagrams: Power, signal, and control wiring.
- C. Field quality-control test reports.
- D. Operation and Maintenance Data: For boilers to include in emergency, operation, and maintenance manuals.
- E. Warranty: Special warranty specified in this Section.
- F. Other Informational Submittals:
 - 1. ASME Stamp Certification and Report: Submit "A," "S," or "PP" stamp certificate of authorization, as required by authorities having jurisdiction, and document hydrostatic testing of piping external to boiler.

1.4 QUALITY ASSURANCE

- A. Electrical Components, Devices, and Accessories: Listed and labeled as defined in NFPA 70, Article 100, by a testing agency acceptable to authorities having jurisdiction, and marked for intended use.
- B. ASME Compliance: Fabricate and label boilers to comply with ASME Boiler and Pressure Vessel Code.

- C. ASHRAE/IESNA 90.1 Compliance: Boilers shall have minimum efficiency according to "Gas and Oil Fired Boilers - Minimum Efficiency Requirements."
- D. UL Compliance: Test boilers for compliance with UL 795, "Commercial-Industrial Gas Heating Equipment." Boilers shall be listed and labeled by a testing agency acceptable to authorities having jurisdiction.

1.5 COORDINATION

- A. Coordinate size and location of concrete bases. Cast anchor-bolt inserts into bases. Concrete, reinforcement, and formwork requirements are specified in Division 03.

1.6 WARRANTY

- A. Special Warranty: Manufacturer's standard form in which manufacturer agrees to repair or replace components of boilers that fail in materials or workmanship within specified warranty period.
 - 1. Warranty Period for Condensing Boilers:
 - a. Failure due to thermal shock: 10 years from date of shipment.
 - b. Heat Exchanger and burner: 5 years from date of shipment.
 - c. Control panel circuit boards against failure due to defective materials or workmanship: one year from date of Substantial Completion.

PART 2 - PRODUCTS

2.1 MANUFACTURERS

- A. Basis-of-Design Product: Subject to compliance with requirements, provide the product indicated on Drawings or a comparable product by one of the following:
 - 1. AERCO International.
 - 2. Patterson – Kelley
 - 3. Lochinvar

2.2 MANUFACTURED UNITS

- A. Description: Factory-fabricated, -assembled, and -tested, condensing boiler with heat exchanger sealed pressure tight, built on a steel base; including insulated jacket; flue-gas vent; combustion-air intake connections; water supply, return, and condensate drain connections; and controls. Water heating service only.
- B. Heat Exchanger: Nonferrous, corrosion-resistant combustion chamber.
- C. Pressure Vessel: Carbon steel with welded heads and tube connections.

- D. Burner: Natural gas, forced draft.
- E. Blower: Centrifugal fan to operate during each burner firing sequence and to prepurge and postpurge the combustion chamber.
 - 1. Motors: Comply with requirements specified in Division 23 Section "Common Motor Requirements for HVAC Equipment."
 - a. Motor Sizes: Minimum size as indicated. If not indicated, large enough so driven load will not require motor to operate in service factor range above 1.0.
- F. Gas Train: Combination gas valve with manual shutoff and pressure regulator.
- G. Ignition: Spark ignition with 100 percent main-valve shutoff with electronic flame supervision.
- H. Casing:
 - 1. Jacket: Sheet metal, with snap-in or interlocking closures.
 - 2. Control Compartment Enclosures: NEMA 250, Type 1A.
 - 3. Finish: Baked-enamel or Powder-coated protective finish.
 - 4. Insulation: Minimum 2-inch- thick, mineral-fiber insulation surrounding the heat exchanger.
 - 5. Combustion-Air Connections: Inlet and vent duct collars.
 - 6. Mounting base to secure boiler.
- I. Characteristics and Capacities: As indicated on the Boiler Schedule on the drawings.

2.3 TRIM

- A. Include devices sized to comply with ANSI B31.9, "Building Services Piping."
- B. Safety Relief Valve: ASME rated.
- C. Pressure and Temperature Gage: Minimum 3-1/2-inch- diameter, combination water-pressure and -temperature gage. Gages shall have operating-pressure and -temperature ranges so normal operating range is about 50 percent of full range.
- D. Boiler Air Vent: Manual.
- E. Drain Valve: Minimum NPS 3/4 hose-end gate valve.

2.4 CONTROLS

- A. Factory boiler controls and remote control panel.
- B. Boiler operating controls shall include the following devices and features:
 - 1. Control transformer.
 - 2. Set-Point Adjust: Set points shall be adjustable.

3. Sequence of Operation: Electric, factory-fabricated and field-installed panel to control burner firing rate. Set supply-water temperature at 140 deg F (adjustable).
 - a. Include automatic, alternating-firing sequence for multiple boilers to ensure maximum system efficiency throughout the load range and to provide equal runtime for boilers.
- C. Burner Operating Controls: To maintain safe operating conditions, burner safety controls limit burner operation.
 1. High Cutoff: Manual and Automatic reset stops burner if operating conditions rise above maximum boiler design temperature.
 2. Blocked Inlet Safety Switch: Manual-reset pressure switch field mounted on boiler combustion-air inlet.
 3. Audible Alarm: Factory mounted on control panel with silence switch; shall sound alarm for above conditions.
- D. Building Automation System Interface: Factory installed hardware and software to enable building automation system to monitor, control, and display boiler status and alarms.
 1. Hardwired Points:
 - a. Monitoring: On/off status, common trouble alarm.
 - b. Control: On/off operation, hot water supply temperature set-point adjustment.
 2. A communication interface with building automation system shall enable building automation system operator to remotely control and monitor the boiler from an operator workstation. Control features available, and monitoring points displayed, locally at boiler control panel shall be available through building automation system.

2.5 ELECTRICAL POWER

- A. Controllers, Electrical Devices, and Wiring: Electrical devices and connections are specified in Division 26 Sections.
- B. Single-Point Field Power Connection: Factory-installed and -wired switches, motor controllers, transformers, and other electrical devices necessary shall provide a single-point field power connection to boiler.
 1. House in NEMA 250, Type 1 enclosure.
 2. Wiring shall be numbered and color-coded to match wiring diagram.
 3. Install factory wiring outside of an enclosure in a metal raceway.
 4. Field power interface shall be to nonfused disconnect switch.
 5. Provide each motor with overcurrent protection.

2.6 VENTING KITS

- A. Kit: Complete system, ASTM A 959, Type 29-4C stainless steel, pipe, vent terminal, thimble, indoor plate, vent adapter, condensate trap and dilution tank, and sealant.

- B. Combustion-Air Intake: inlet air opening with screen, and sealant in accordance with manufacturer's written installation instructions. Combustion air shall be drawn from within the room.

2.7 SOURCE QUALITY CONTROL

- A. Burner and Hydrostatic Test: Factory adjust burner to eliminate excess oxygen, carbon dioxide, oxides of nitrogen emissions, and carbon monoxide in flue gas and to achieve combustion efficiency; perform hydrostatic test.
- B. Test and inspect factory-assembled boilers, before shipping, according to ASME Boiler and Pressure Vessel Code.

PART 3 - EXECUTION

3.1 EXAMINATION

- A. Before boiler installation, examine roughing-in for concrete equipment bases, anchor-bolt sizes and locations, and piping and electrical connections to verify actual locations, sizes, and other conditions affecting boiler performance, maintenance, and operations.
 - 1. Final boiler locations indicated on Drawings are approximate. Determine exact locations before roughing-in for piping and electrical connections.
- B. Examine mechanical spaces for suitable conditions where boilers will be installed.
- C. Proceed with installation only after unsatisfactory conditions have been corrected.

3.2 BOILER INSTALLATION

- A. Install boilers level on concrete base. Concrete base is specified in Division 23 Section "Common Work Results for HVAC," and concrete materials and installation requirements are specified in Division 03.
- B. Vibration Isolation: Elastomeric isolation pads.
- C. Install gas-fired boilers according to NFPA 54.
- D. Assemble and install boiler trim.
- E. Install electrical devices furnished with boiler but not specified to be factory mounted.
- F. Install control wiring to field-mounted electrical devices.

3.3 CONNECTIONS

- A. Piping installation requirements are specified in other Division 23 Sections. Drawings indicate general arrangement of piping, fittings, and specialties.
- B. Install piping adjacent to boiler to allow service and maintenance.
- C. Connect piping to boilers, except safety relief valve connections, with flexible connectors of materials suitable for service.
- D. Connect gas piping to boiler gas-train inlet with union. Piping shall be at least full size of gas train connection. Provide a reducer if required.
- E. Connect hot-water piping to supply- and return-boiler tapings with shutoff valve and union or flange at each connection.
- F. Install piping from safety relief valves to nearest floor drain.
- G. Boiler Venting:
 - 1. Install flue venting kit and combustion-air intake.
 - 2. Connect full size to boiler connections. Comply with requirements in Division 23 Section "Breechings, Chimneys, and Stacks."
- H. Ground equipment according to Division 26 Section "Grounding and Bonding for Electrical Systems."
- I. Connect wiring according to Division 26 Section "Low-Voltage Electrical Power Conductors and Cables."

3.4 FIELD QUALITY CONTROL

- A. Perform tests and inspections and prepare test reports.
 - 1. Manufacturer's Field Service: Engage a factory-authorized service representative to inspect components, assemblies, and equipment installations, including connections, and to assist in testing.
- B. Tests and Inspections:
 - 1. Perform installation and startup checks according to manufacturer's written instructions.
 - 2. Leak Test: Hydrostatic test. Repair leaks and retest until no leaks exist.
 - 3. Operational Test: Start units to confirm proper motor rotation and unit operation. Adjust air-fuel ratio and combustion.
 - 4. Test and adjust controls and safeties. Replace damaged and malfunctioning controls and equipment.
 - a. Check and adjust initial operating set points and high- and low-limit safety set points of fuel supply, water level and water temperature.
 - b. Set field-adjustable switches and circuit-breaker trip ranges as indicated.

- C. Remove and replace malfunctioning units and retest as specified above.

3.5 DEMONSTRATION

- A. Engage a factory-authorized service representative to train Owner's maintenance personnel to adjust, operate, and maintain boilers. Refer to Division 01 Section "Demonstration and Training."

END OF SECTION 235216

SECTION 238413 - HUMIDIFIERS

PART 1 - GENERAL

1.1 SUMMARY

- A. This Section includes self-contained humidifiers.

1.2 ACTION SUBMITTALS

- A. Product Data: Include rated capacities, operating characteristics, furnished specialties, and accessories.
- B. Shop Drawings: Detail fabrication and installation of humidifiers. Include piping details, plans, elevations, sections, details of components, manifolds, and attachments to other work.
 - 1. Include wiring diagrams.

1.3 INFORMATIONAL SUBMITTALS

- A. Field quality-control test reports.

1.4 CLOSEOUT SUBMITTALS

- A. Operation and maintenance data.

1.5 QUALITY ASSURANCE

- A. Electrical Components, Devices, and Accessories: Listed and labeled as defined in NFPA 70, Article 100, by a testing agency acceptable to authorities having jurisdiction, and marked for intended use.
- B. Comply with ARI 640, "Commercial and Industrial Humidifiers."

PART 2 - PRODUCTS

2.1 SELF-CONTAINED HUMIDIFIERS

- A. Basis-of-Design Product: Subject to compliance with requirements, provide product indicated on Drawings or comparable product by one of the following:
 - 1. Nortec Industries Inc.
 - 2. Carel USA

3. Spirax Sarco
- B. Gas-Fired Steam Generator: Factory assembled and tested.
1. Standard: Fabricate and label steam generator to comply with CSA.
 2. Burner Type: Natural-gas fired with modulating, low NOx infrared burner, minimum 83 percent efficient based on higher heating value and 94% efficient based on the lower heating value.
 3. Gas Train: Safety shutoff valves, gas cock, strainer, pressure-regulating valve.
 4. Ignition: Hot-surface ignition with flame safety system.
 5. Combustion Chamber: Sealed with outdoor-air and flue-vent connections.
 6. Heat-Exchanger Tank: Cleanable, ASTM A 666, stainless steel with corrosion-resistant coating.
- C. Manifold: Stainless-steel tube with integral fan to discharge vapor directly into occupied space.
- D. Manifold: ASTM A 666, stainless-steel tube extending across entire width of duct or plenum and equipped with mounting brackets on ends.
- E. Cabinet: Sheet metal enclosure for housing heater cylinder, electrical wiring, components, controls, and control panel. Enclosure shall include baked-enamel finish, hinged or removable access door, and threaded outlet in bottom of cabinet for drain piping.
- F. Control Panel:
1. Factory-wired disconnect switch.
 2. Liquid-crystal display.
 3. Programmable keyboard.
 4. Set-point adjustment.
 5. Warning signal indicating end of replaceable cylinder life.
 6. Low-voltage, control circuit.
 7. Diagnostic, maintenance, alarm, and status features.
 8. High-water float to prevent overfilling.
- G. Controls:
1. Microprocessor-based control system for modulating or cycling control, and start/stop and status monitoring for interface to central HVAC instrumentation and controls.
 2. Solenoid-fill and automatic drain valves to maintain water level and temper hot drain water.
 3. Field-adjustable timer to control drain cycle for flush duration and interval.
 4. Controls shall drain tanks if no demand for humidification for more than 72 hours.
 5. Conductivity or float-type level controls.
- H. Capacities and Characteristics:
- a. Refer to schedule on drawings.

PART 3 - EXECUTION

3.1 INSTALLATION

- A. Install humidifiers with required clearance for service and maintenance.
- B. Install manifold supply piping pitched to drain condensate back to humidifier.
- C. Equipment Mounting:
 - 1. Install steam generators on cast-in-place concrete equipment base(s).
- D. Install gas-fired steam generators according to NFPA 54.
- E. Piping installation requirements are specified in other Sections. Drawings indicate general arrangement of piping, fittings, and specialties.
 - 1. Install piping adjacent to humidifiers to allow service and maintenance.
 - 2. Install union in humidifier makeup line.
- F. Install electrical devices and piping specialties furnished by manufacturer but not factory mounted.
- G. Install piping from safety relief valves to nearest floor drain.
- H. Connect gas piping full size to steam-generator, gas-train inlet with union. Gas piping materials and specialties are specified in Section 231123 "Facility Natural-Gas Piping."
- I. Connect breeching full size to steam-generator outlet. Venting materials are specified in Section 235100 "Breechings, Chimneys, and Stacks."
- J. Ground equipment according to Section 260526 "Grounding and Bonding for Electrical Systems."
- K. Connect wiring according to Section 260519 "Low-Voltage Electrical Power Conductors and Cables."

3.2 FIELD QUALITY CONTROL

- A. Perform tests and inspections and prepare test reports.
- B. Tests and Inspections:
 - 1. Leak Test: After installation, charge system and test for leaks. Repair leaks and retest until no leaks exist.
 - 2. Operational Test: After electrical circuitry has been energized, start units to confirm proper motor rotation and unit operation.
 - 3. Test and adjust controls and safeties. Replace damaged and malfunctioning controls and equipment.

- C. Remove and replace malfunctioning units and retest as specified above.

3.3 DEMONSTRATION

- A. Engage a factory-authorized service representative to train Owner's maintenance personnel to adjust, operate, and maintain humidifiers. Refer to Section 017900 "Demonstration and Training."

END OF SECTION 238413

PLEASE USE THIS FORM TO PROVIDE THE VARIANCE FOR ANY ITEMS IN THE SPECIFICATION: (form may be duplicated)

[illegible]

**THIS PAGE IS MANDATORY
BID FORM**

**PRIMARY SPACE HEATING HOT WATER BOILER
And
CONTROL SYSTEM SOFTWARE PROJECT**

We, the undersigned, agree to Primary Space Heating Hot Water Boiler and Control System Software Project used by the Bloomington Public Library, Bloomington, Illinois, at the below bid price, and to supply all services as required in the requirements and Instructions to Bidders. We further agree to fully deliver and install the equipment completely assembled and in operating condition. Substantial Completion for this project shall be achieved no later than May 15, 2014.

BASE BID

AMOUNT

\$ _____

Alternate Bid No. 1

AMOUNT

\$ _____

Alternate Bid No. 2

AMOUNT

\$ _____

Firm

Authorized Signature & Seal

Address

City

State

Zip

Phone Number

Date

Email Address: _____

BID CHECKLIST:

1. Return the **entire** packet – not just your response
2. Sign and Attach all addenda if any were issued
3. Sign and date all required forms
4. Include a copy of your certificate of insurance for your business and any other required certificates, permits, etc.
5. Seal the envelope and attach the label or print in the lower left corner of the outer envelope the bid/proposal name and date due
6. Your (1) original, (3) required copies and a digital file on a flash-drive
7. Anything relative to this bid

TENTATIVE BID SCHEDULE:

A. The following projected timetable should be used as a working guide for planning purposes. The Library reserves the right to adjust this timetable as required during the course of the bid process.

Action	Due Date
BID Released	1/23/2014
Pre-BID Meeting 10:00 AM	2/6/2014
Questions Due to Library 5:00 PM	2/6/2014
Response from Library by 10:00 AM	2/10/2014
BIDS Due 2:00 PM	2/12/2014
Anticipated Award Date	2/18/2014

A. Questions will be answered in the form of written addenda and provided to all Bidders, as per State of Illinois statutes. Submit questions regarding the bid in writing to Caprice Prochnow, Support Services Manager, at cprochnow@bloomingtonlibrary.org no later than February 6, 2014 5:00 PM.

END OF DOCUMENT

Bloomington Public Library

Books are just the beginning.

Find

Use

See & Do

Participate

Bloomington Public Library

205 East Olive Street

Bloomington, IL 61701-5218

(309) 828-6091

www.BloomingtonLibrary.org

Bloomington Public Library

Policies Manual

1/21/2014

5. Facilities	60
5.1 Hours of Operation	60
5.2 Library Patron Conduct Policy	60
5.3 Customer Expectations Guidelines	62
5.4 Unattended Child Policy	63
5.5 Policy Regarding Display Space	63
5.6 Meeting Room Usage Policy	64
5.8 Video Surveillance Policy	67
5.9 Active Shooter Event Policy	68
6. Technology	70
6.1 Technology Plan 2010-2013	70
6.2 Computer Usage Policy	73
6.3 IT Usage Policy for Staff	74
6.4 Laptop Usage Policy	75
6.5 Internet Policy	76
<i>Appendix</i>	<i>79</i>
<i>A. Organizational Chart</i>	<i>79</i>
<i>B. Freedom of Information Act</i>	<i>80</i>
<i>C. Library Bill of Rights</i>	<i>101</i>
<i>D. Access for Children and Young Adults to Nonprint Materials</i>	<i>102</i>
<i>E. Access to Digital Information, Services and Networks</i>	<i>104</i>
<i>F. Access to Library Resources and Services Regardless of Sex, Gender, Identity, Gender Expression, or Sexual Orientation</i>	<i>107</i>
<i>G. Challenged Materials</i>	<i>109</i>
<i>H. Diversity in Collection Development</i>	<i>110</i>
<i>I. Freedom to Read Statement</i>	<i>112</i>
<i>J. Labels and Rating Systems</i>	<i>116</i>

of the Board of Directors are open to the public as provided in the Illinois Revised Statutes, Chap. 102, Secs. 41-44.

2. Special meetings may be held at any time at the call of the President, the Vice-President, or any two members of the Board, provided that notice and purpose of the special meetings be given at least 24 hours prior to the meeting.
3. A quorum at any meeting shall consist of a majority of the members of the Board.
4. The Officers of the Board of Directors shall be a President, a Vice-President, a Secretary, and a Treasurer. They shall be elected at the first regular meeting of the Board each fiscal year and shall serve one year terms, or until their successors are elected.
5. The President shall preside at all meetings of the Board, appoint all committees and perform such other duties as are normally associated with the office or may be assigned by the Board. The President may ask the Mayor to declare a Board Member's seat vacant if such Board member has three consecutive unexcused absences from regularly scheduled Board meetings. In the absence of the President, the Vice-President shall preside. The Secretary, or designate, shall keep the minutes of the Board meetings, call the roll and record votes. The Treasurer shall review the budget and shall have such other duties as may be assigned by the Board. The Library Director shall issue notice of all meetings, to include minutes of the prior meeting, the agenda to be discussed at the proposed meeting, and any reports essential to consideration of the agenda.
6. Committees: The President may appoint such committees and charge them with such responsibilities as are deemed appropriate. The three standing committees are the Budget and Personnel Committee, the Planning, Policy and Programs Committee (3 P's) Committee, and the Nominating Committee.
 - A. The Budget and Personnel Committee is charged with 1) reviewing the Library's annual budget; and 2) evaluating the Library Director, annually
 - B. The 3 P's Committee is charged with 1) developing, with staff, the short-term and long-term plans for the Library; 2) with staff, periodically reviewing Library policies; and 3) with staff, reviewing and assessing the Library's balance of programs
 - C. The Nominating Committee is charged with preparing and presenting the slate of officers, in consultation with all Board members, including seeking self-nominations
7. Order of Business: the order of business at all regular meetings of the Board shall be determined by the Board.
8. Robert's Rules of Order Revised shall govern the parliamentary procedure of the Board except as specified herein.
9. All regular and special meetings of the Board shall be open to the public and to the press, except closed sessions as authorized by the statutes of the State of Illinois.

Trustees who accept library board responsibilities are expected to perform all of the functions of library trustees.

1.5 Library Board Officers and Committees Procedures

Approved February 19, 2013

Nomination of Officers

The Bylaws specify that “the officers shall be a President, a Vice-President, a Secretary and a Treasurer and that a Nominating Committee is charged with preparing and presenting the slate of officers, in consultation with all Board members, including self-nominations.”

The following procedures are in place to satisfy the requirements of the Bylaws.

1. The President shall select a Nominating Committee of three members from the Board of Trustees at least one month prior to the end of the fiscal year.
2. The Nominating Committee shall solicit interested Board members for the officers of the Board. It will be an expectation of the Committee that they will contact all Board members. The Chair will pass around a sheet of paper with the description of the responsibilities of each of the Officers so that any trustee may volunteer to serve. Any trustee absent from the meeting will be contacted by a committee member to determine their interest in any position.
3. The Nominating Committee shall present a slate of officers at the April meeting. The Board will vote to elect the slate of officers at that meeting.
4. The new officers will take office at the first meeting of the new fiscal year.

Committees of the Board

As outlined in the Bylaws, “The President may appoint such committees and charge them with such responsibilities as are deemed appropriate. The three standing committees are the Budget and Personnel Committee, the Planning, Policy and Programs Committee (3 P’s Committee), and the Nominating Committee.

1. The Budget and Personnel Committee is charged with 1) reviewing the Library’s annual budget; and 2) evaluating the Library Director annually.
2. The 3 P’s Committee is charged with 1) developing, with staff, the short-term and long-term plans for the Library; 2) with staff, periodically reviewing Library policies; and 3) with staff, reviewing and assessing the Library’s balance of programs.
3. The Nominating Committee is charged with preparing and presenting the slate of officers, in consultation with all Board members, including seeking self-nominations.”

Committee Appointments

All trustees will be asked to serve on one or more of the Board committees. The President will review and make appointments annually. The sheet of paper distributed to the Board each year to solicit nominations shall also include a description of the responsibilities of the committees. Trustees may volunteer to serve on the committee/committees that interest them. The President will select and announce the Chair and members of each committee in May at the first meeting of the fiscal year. This is the same meeting at which the new officers take office.

Committees

The President may appoint such committees and charge them with such responsibilities as are deemed appropriate. The three standing committees are the Budget and Personnel Committee, the Planning, Policy and Programs Committee (3 P's) Committee), and the Nominating Committee.

The **Budget and Personnel Committee** is charged with 1) reviewing the Library's annual budget; and 2) evaluating the Library Director, annually.

The **3 P's Committee** is charged with 1) developing, with staff, the short-term and long-term plans for the Library; 2) with staff, periodically reviewing Library policies; and 3) with staff, reviewing and assessing the Library's balance of programs.

The **Nominating Committee** is charged with preparing and presenting the slate of officers, in consultation with all Board members, including seeking self-nominations.

1.6 Illinois Freedom of Information Act

Approved 8/19/08; Updated 1/21/14

c. Faxed to: (309) 434-2628

Requests for information can be made from the FOIA Request for Public Records form, or at the City Clerk's office at 109 East Olive Street, Bloomington, Illinois. The office hours are Monday – Friday 8:00AM to 5:00PM. Records may be inspected, copied or provided electronically. If inspected, an employee must be present throughout the inspection.

FOIA Timeline and fees can be accessed at the City of Bloomington's website:
www.cityblm.org.

Certain types of information maintained by us are exempt from inspection and copying. However, the following types or categories or records are maintained under our control:

1. Ordinances and Resolutions
2. Board Policies
3. Administrative Procedures
4. Monthly Financial Statements
5. Annual Receipts and Disbursements Reports
6. Budget and Appropriation Ordinances
7. Levy Ordinances
8. Annual Audits
9. Operating Budgets
10. Minutes of the Board of Trustees and Committees
11. Job Descriptions
12. Annual Reports to the State Comptroller

Records which are stored in electronic data processing will usually be printed out on paper for use by requesters, unless other arrangements are expressly made with the FOIA officer at the times the request is made.

(5 ILCS 140/) Illinois Freedom of Information Act, Appendix B.

1.7 Investment Policy

Approved August 18, 2009; Revised February 10, 2010

The purpose of this policy statement is to outline the responsibilities, general objectives, and specific guidelines for gifts to the library and management of public funds by the Bloomington Public Library.

All investment policies and procedures of the Bloomington Public Library will be in accordance with Illinois law. The authority of the Library Board of Trustees to control and invest public funds is defined in the Illinois Public Funds Investment Act, and the investments permitted are described therein. Management responsibility for the Library's funds is delegated to the City of Bloomington and investment of the Library funds is governed by the City of Bloomington Investment Policy.

materials are considered in the same manner as purchased material. Gifts not added to the collection will be donated to the Friends of the Library for sale.

1.9 Purchasing Policy

Approved August 19, 2008; Revised March 17, 2009; Revised August 16, 2011; Revised; January 24, 2012

These purchasing procedures are to be followed in the purchasing of materials, supplies, construction and services for Bloomington Public Library.

Purchases of the Bloomington Public Library are governed by the State of Illinois statutes. Further, it is the policy that all purchases, contracts, and expenditure of funds shall be awarded to the lowest responsible bidder or supplier considering conformity with specifications, terms of delivery, quality, and serviceability.

The Library, like the City of Bloomington, is required by Federal law to engage in a policy of strict nondiscrimination in employment without consideration of race, color, religion, sex, age, national origin, marital status, veteran status, physical or mental disability unrelated to ability. Federal law also requires the use of provisions in every contract or purchase order that require contractors and subcontractors to conform to strict nondiscrimination practices.

All employees shall be responsible for adherence to these purchasing procedures and to the National Institute of Government Purchasing Code of Ethics.

All purchases should be routed through the Business Manager and approved by the Director and the Library Board of Trustees.

All purchases of goods and services should be made within the parameters of the approved working budget, from funds that are in excess of all unpaid obligations within appropriate line items.

GUIDELINES

All purchases shall be made, if possible on competitive bids or quotations in order to secure at the lowest total cost, the highest quality commodity, material, equipment or service.

At all times, the purchaser shall follow the established guidelines:

Items costing up to \$4,999.99 may be purchased without obtaining three quotes by authorized staff.

Purchases from \$5,000 to \$9,999.99 require three written quotes and Director approval.

Purchases from \$10,000 to \$19,999.99 require three written quotes, Director approval, and Library Board of Trustees approval.

determined to have been purchased with a value of less than \$1000 may be disposed of in an appropriate method determined by the Library Director. Items that were purchased with a cost of \$1000 or over will be declared surplus by the Library Board and disposed of in one of the permissible methods listed below. A list of items to be declared surplus will be compiled, reviewed, and voted on by the Library Board before any action will be taken.

Permissible methods of disposing of surplus property include: public auction, solicitation of written bids, trade-in on new equipment, transfer to another agency of the City at or below reasonable market value, donation to a non-profit, garage sale, or sold for scrap. If the property has been offered in one of the above manners and not been able to be sold, the property may be given away or disposed of.

Surplus property sold by the Library is sold in "as is, where is" condition without warranty, either express or implied with payment on delivery expected.

1.11 Equal Employment Opportunity Policy

Approved May 2007

Discrimination

We value diversity and the many contributions that are made to our organization by people from all walks of life. Therefore, it is our policy not to discriminate against any employee or applicant for employment because of race, color, religion, age, sex, national origin, disability, sexual orientation or any other attribute or characteristic protected by law. The policy not to discriminate in employment includes, but is not limited to, the following:

- The Library will employ those applicants who possess necessary skills, education, and experience, without regard to race, color, religion, age, sex, national origin, disability, sexual orientation or any other attribute or characteristic protected by law.
- The Library will promote, upgrade, transfer, demote, recruit, advertise, and solicit for employment without regard to race, color, religion, age, sex, national origin, disability, sexual orientation or any other attribute or characteristic protected by law.
- The Library will provide for training during employment, and select for training and apprenticeship programs, without regard to race, color, religion, age, sex, national origin, disability, sexual orientation or any other attribute or characteristic protected by law.
- No employee will aid, abet, compel, coerce, or conspire to discharge or cause another employee to resign because of race, color, religion, age, sex, national origin, disability, sexual orientation or any other attribute or characteristic protected by law.
- The Library will establish rates of pay and terms, conditions, and privileges of employment without regard to race, color, religion, age, sex, national origin, disability, sexual orientation or any other attribute or characteristic protected by law.

Reporting and Investigation

Any employee who experiences discrimination as a result of their race, color, religion, age, sex, national origin, disability, sexual orientation or any other attribute or characteristic protected by law must promptly report the matter to the Human Resources Manager or the City Human

Department. If the complaint involves the Human Resources Manager, prompt notification should be made to the Library Director.

Any supervisor who becomes aware of possible sexual or other unlawful harassment, or to whom a report of discrimination is made, must promptly notify the Human Resources Manager or the City Human Resources Department. If the complaint involves the Human Resources Manager, prompt notification should be made to the Library Director.

Any employee who witnesses an incident of sexual or other unlawful harassment should promptly notify the Human Resources Manager or the City Human Resources Department. If the complaint involves the Human Resources Manager, prompt notification should be made to the Library Director

The Bloomington Public Library does not tolerate any form of retaliation against employees availing themselves of this procedure in good faith.

This procedure should not be construed, however, as preventing, limiting or delaying the Library from taking disciplinary action against any individual, up to and including termination, in circumstances where the Library deems disciplinary action appropriate.

Any Library employee found to have engaged in sexual or other unlawful harassment or retaliation is subject to disciplinary action, up to and including immediate termination.

full-time employee is subject to all library rules and regulations and receives benefits and rights as provided by the Union Contract and/or Personnel Code.

1.4.5. Part-time -- A part-time employee is paid on an hourly basis and works less than 38 hours per week. A part-time employee is subject to all library rules and regulations and receives benefits and rights as provided by the Union Contract and/or Personnel Code.

1.4.6. Temporary Employees -- A temporary employee works to complete a special project, to fill a position for an employee on a leave of absence, or for a defined time period on either a salaried or hourly paid basis. A temporary employee is not a part of the bargaining unit.

1.5. Conflict of Interest. No employee of the Library shall personally profit directly or indirectly from any contract, purchase, sale or service between the Library and any person or company.

ARTICLE 2. UNION COVERAGE

2.1. Coverage Under the Union Contract. The terms and provisions of the Union Contract describe the categories of personnel and circumstances that are covered by the Union Contract. Employees covered under the terms and provisions of the Union Contract are referred to as "bargaining unit" employees in this Personnel Code and employees who are not covered under the Union Contract are referred to as "non-bargaining unit" employees.

ARTICLE 3. HOURS OF WORK AND OVERTIME

3.1. Hours of Work Necessary for Library Operation. Work schedules are established by the Director and/or Manager to meet the needs of Library patrons and may require that any and all employees work evenings, weekends, and split days.

3.2. Workweek. The workweek for all employees is Sunday through Saturday. All full-time employees, other than custodians, work a thirty-eight (38) hour week. The workweek of full-time Operations staff consists of a forty (40) hour week. The workweek for the Director and Managers is thirty-eight (38) hours; however, the Director and the Managers are responsible for high quality service and/or production levels in their departments and are not restricted to a fixed number of hours per week.

3.3. Scheduling. Work schedules will be posted two weeks in advance, but are subject to change due to the Library's needs and/or unforeseen staffing shortages. All employees will be notified of such changes as much in advance as possible. Work on Sundays by employees is essential if the Library is to serve the needs of its patrons. Full-time staff who work four or more hours on Sunday will receive the following Friday and Saturday off within the same workweek.

3.4. Rest Break. Employees who work six (6) hours or more in any workday shall be entitled to two (2) fifteen (15) minute uninterrupted breaks. Employees who work more than two (2) hours but less than six (6) hours in any workday shall be entitled to one (1) fifteen

5.2. Vacation Scheduling.

5.2.3. Bargaining Unit Employees. Bargaining Unit employees shall refer to Article 5, Section 5.2 of the Union Contract.

5.2.4. Non-Bargaining Unit Employees. Vacation is an earned privilege and must be taken at a time convenient to the employee's department and to the Library. Vacations of one week or longer should be scheduled at least a month in advance if possible and must be approved by the Director and/or Manager. Vacation requests must be submitted before leave time has been taken.

5.2.5. Probationary Period. After the completion of a new employee's probationary period, up to half (1/2) of the annual allotment of paid vacation may be taken.

5.2.6. Approval for Deviations. The Director must approve any deviation from vacation leave policy in writing in advance.

5.2.7. Vacation Carry-Over. Vacations must be taken within the vacation year in which they are due unless an exception is granted by the Library Director. Full-time employees may carry over up to but no more than twenty-four (24) hours of vacation time annually. Part-time employees may carry over up to but no more than twelve (12) hours of vacation time annually. Written requests for carry-over must be made to the Director sufficiently in advance of the annual vacation date.

5.2.8. Increments. Vacation leave can be taken in fifteen (15) minute increments after the first half hour. Example: .5 hour; .75 hour; 1 hour; 1.25 hours; 1.5 hours; 1.75 hours, etc.

5.3. Holidays During Vacation. In the event a paid holiday falls during an employee's vacation period, an employee eligible for holiday pay will receive holiday pay for the day.

5.4. Vacation Rights in Case of Separation or Layoff. Unused vacation leave shall not be compensated by a cash settlement except upon separation of employment. Employees shall be paid for their accrued, unused vacation at separation of employment or in the event the employee is laid off.

ARTICLE 6. WAGES

6.1. Positions. All positions in the Library are grouped into classifications based on complexity and difficulty of duties, responsibilities, and qualifications required, including education, technical training, and experience.

6.2. Pay Plan. The pay plan of the Library for positions not covered by the Union Contract consists of a range for each position title, with the rates of pay adjusted, within budget, to reflect the level of difficulty and responsibility of each position. The non-bargaining unit salary range for each position should ensure pay compared with that received by persons doing comparable work either in the Bloomington Public Library and similar-sized public libraries in the Midwest, or in a public service organization in the community.

- 7.3.4. An account of other incidences of similar nature, if any, for which the employee has received warnings or reprimands.
 - 7.3.5. Actions that must be taken by the employee to correct the offense.
 - 7.3.6. The disciplinary action to be taken for the offense.
 - 7.3.7. The disciplinary action that will be taken in the future should the employee repeat the offense or not show improvement in work performance.
 - 7.3.8. The statement that a copy of the reprimand is being placed in the employee's personnel file.
- 7.4. **Warning and Reprimand Appeals.** The employee has the right to appeal a warning or reprimand and must do so in writing within three (3) working days following receipt of the warning or reprimand. If the appeal cannot be resolved on the supervisory level, it shall be submitted to the Director. If not satisfactorily resolved, the employee may opt for the appeal process in accordance with Article 8 of the Personnel Code.
- 7.5. **Suspensions.** Suspension is the removal of an employee from the worksite for a specified period of time, usually from one (1) day to several weeks. A suspension cannot be recommended unless there have been attempts to correct an employee's deficiencies through discussions with the Manager, appraisal reports, and verbal and/or written warnings or reprimands. Thus, there must be documentation in the employee's personnel file to justify the action. When a serious incident has occurred, disciplinary action may immediately go directly to suspension or termination.
- 7.5.3. **Suspension Due to Criminal Offense.** A staff member charged with a criminal offense may be suspended without pay pending the outcome of the hearing. If the employee is cleared by investigation, restitution of unpaid salary will be made.
- 7.6. **Demotion.** Demotion is the assignment of an employee to a lower-grade position, which carries with it compensation within that lower pay schedule. The Employer does not bestow this method as a means of discipline for persons who have violated the rules of conduct; however, it is used for employees who have demonstrated an inability to perform their assignments in a competent and effective manner, but do have potential for performing an acceptable job in a lower rank. Prior to demotion the employee must have received written warning in which it was specified how performance could be improved to a satisfactory level. Demotion must be supported by the supervisory chain of command and sanctioned by the Director.
- 7.7. **Termination.** Termination is the removal and discharge of an employee from employment. A termination action bars the employee from any future employment with the library. Although this action may be taken for a one-time severe and intolerable infraction of library rules or policies, it is normally the culmination of a continuing serious problem that has not been resolved by other methods and in which the employee is not amenable or capable of altering behavior or performance. Terminations are made by the Director and/or Manager and Human Resources Manager. See also: 9.6.2.
- Employees shall receive a written notice of termination. Such notice shall present the reason(s) for the action and what steps have been taken by the Library in the past to

8.5.7. Continuance for additional evidence or witnesses shall be permitted, if necessary, for proper determination of the validity of the appeal. The hearing may be continued for a period not to exceed seven (7) working days.

8.6. Decision of the Hearing.

8.6.3. Within five (5) working days following the hearing, the Board of Trustees must render a written decision.

8.6.4. The decision shall be rendered by mail to the Director and to the employee.

8.6.5. The decision shall be based only on the evidence, written and verbal, presented at the hearing.

8.6.6. The decision shall contain a summary statement of facts, issues, findings, and basis for decision.

8.6.7. The decision shall be final. There is no further recourse for either party.

ARTICLE 9. INTERNAL MOVEMENT AND TERMINATION

9.1. **Tenure.** The employee is assured tenure after satisfactorily completing probation (unless the appointment is for a temporary position) as long as the employee performs competently and in accordance with Library policies and practices, and as long as the financial conditions of the Library, as determined by the Board of Trustees, allow continued employment.

9.2. **Promotion.** Promotion is the shifting of an employee to a position of higher grade with a higher salary. Promotion is based upon evidence of above satisfactory performance, superior performance evaluation, and evident promise of future development, as well as marked educational, technical, and personal qualification. Length of service, unaccompanied by superior performance or acquisition of new skills, is a reason against promotion, rather than in favor of it.

9.3. **Longevity.** Longevity is only a determining factor when candidates have equal qualifications.

9.4. **Lateral.** Lateral is shifting an employee to a position of the same grade in another department, without a salary increase or decrease. Lateral transfers are made whenever feasible or necessary to meet the needs of the Library and the welfare of the staff. Lateral transfers can be made as an aid in proper placement, to provide additional or wider experience, or to achieve more effective use of staff.

9.5. **Probationary Period.** The first six (6) months of service for all original appointments shall constitute the probationary period. This may be extended for an additional six (6) months for non-bargaining staff, and for three (3) months for employees covered by the union contract, for good cause by notifying the affected employee in writing. During this probationary period, any original employee may be dismissed by the Director for any reason not prohibited by law, without right of appeal or hearing in any manner.

9.6. **Termination of Service.** Service will be terminated when an employee resigns or is terminated.

- 10.6. Nepotism.** The Library shall not employ relatives of supervisory staff, Managers, Director, Trustees, Friends Board members, Foundation Board members, or City Officials. The Library shall not employ relatives of current employees to work in the same department.
- 10.7. Probation on Promotion.** Any employee who accepts a promotion will be on probation in that position for ninety (90) calendar days. During the probationary period, if the employee fails to demonstrate his/her ability to perform the work involved, he/she shall be transferred back to the position he/she vacated, displacing the employee, if any, who replaced him/her. During the probationary period, the employee may voluntarily return to the position which he/she vacated, displacing the employee, if any, who replaced him/her.
- 10.8. Probation Review.** A review of the employee's work performance will be made midway and at the end of the probationary period. The Director and/or Manager will discuss this review with the employee.

ARTICLE 11. TRAINING AND EDUCATION

11.1. Library Conferences, Workshops, Seminars, and Conventions. Every effort is made by the Director and/or Manager to allow as many staff members as possible to attend library conferences, workshops, seminars, and conventions on a regular basis. The Director and/or Manager must approve attendance, subject to availability of funds within each departmental budget. Employees will be granted a paid leave of absence for the period necessary for event attendance. Travel time shall be considered as time worked to the extent required by the Fair Labor Standards Act. Provisions of the Article are in accordance with the Library's Travel/Training Guidelines.

11.1.3. Guidelines for Staff Attendance.

Priority of Staff.

1. Staff members who have a job directly related to the subject of the conference or agenda of the meeting;
2. Staff who are members of and active in professional organizations;
3. Staff who are members of professional organizations;
4. Staff attending at the request of the Director and/or Manager;
5. All others.

Priority of Meetings and Conferences.

1. Local and regional meetings sponsored by public libraries and public library systems;
2. Illinois Library Association—Annual Conference;
3. American Library Association—Annual Conference and meeting of ALA Divisions;
4. All others.

- 11.3. Separation of Employment.** Any employee who leaves the Library within one (1) year of completing a course will refund the Library the amount paid for the course or reimbursed by the Library. This sum may be withheld from the final paycheck.
- 11.4. Leave for Library Related Course Work.** After completing six (6) months of service, a full-time employee may request use of leave time to attend library related course work for academic credit which, even after work schedules are rearranged by mutual agreement, cannot be scheduled during non-work time. The time off shall be charged to earned leave time in the following order:
1. Compensatory time;
 2. Vacation time;
 3. Personal time.
- 11.4.1. Approval for Leave.** Approval for this leave will be at the discretion of the Director and/or Manager. Such approval will not be unreasonably withheld.
- 11.5 Non Credit Classes.** All employees shall be given the opportunity to take job related non-credit classes (eg. Heartland Community Education, Alliance Library System continuing education classes) subject to the availability of funds and arrangements of work schedules. Employees must receive approval from the Director or their Department Manager. If an employee does not complete the class, he/she will be required to reimburse the library for the cost of the class.

ARTICLE 12. SICK LEAVE

- 12.1. Sick Leave Accrual.** Sick leave shall accrue for all new full-time management and other non-bargaining unit employees at the following rate:

First twelve months. Two and one half days (20 hours) per month for the first twelve (12) months of employment, which shall be paid at full pay during time of illness.

After the first year. The accrual rate will be one day (8 hours) per month up to a total of one hundred twenty (120) days (960 hours) less sick leave used.

Leave Taken in Increments. Sick leave can be taken in fifteen (15) minute increments after the first half hour. Example: .5 hour, .75 hour, 1 hour; 1.25 hours; 1.5 hours; 1.75, etc.

Serious Health Conditions. An illness, injury, impairment, or physical or mental condition that involves in-patient care in a hospital, hospice, residential medical care facility, or continuing treatment by a physician is considered a serious health condition.

Sick Leave Accrual After Serious Illness. After the employee has returned to work and has depleted all but eighty (80) hours of sick leave, by reason of one or more serious health conditions, the employee will accrue sick leave at the rate of two and one-half (2½) days (20 hours) per month until his/her sick leave returns to the level maintained before the serious health condition(s).

Sick Leave Accrual Eligibility After Serious Illness. In order to be eligible to receive sick leave benefits as above specified, an employee returning to work must present to

800 or more

70%

All employees hired May 1, 1997 and thereafter, who are at least 55 years of age with twenty (20) years of service as a Library employee, may choose to be paid at their final hourly rate for all accumulated unused sick leave according to the following schedule:

<u>Total Hours Available</u>	<u>Percentage</u>
Less than 400	0%
Next 100 Hours (400-499)	50%
Next 100 Hours (500-599)	55%
Next 100 Hours (600-699)	60%
Next 100 Hours (700-799)	65%
Next 161 Hours (800-960)	70%

- 12.3. IMRF Creditable Service.** The Library and the City agree that IMRF Creditable Service Credits shall be retroactive to March 1995.

Sick Leave Creditable Service Days. Employees who have accumulated the maximum sick leave accrual of one hundred twenty (120) days (960 hours) may continue to accrue, for Illinois Municipal Retirement Fund creditable service purposes only, additional sick leave up to a maximum of two hundred forty (240) sick days. It is understood between the parties that such additional accrual over one hundred twenty (120) days (960 hours) shall be used for IMRF creditable service purposes only, and may never be used for any form of paid sick leave.

Sick Leave Accrual. If an employee who has accrued unused sick leave in excess of one hundred twenty (120) days (960 hours) is required to use sick leave which reduces the one hundred twenty (120) day (960 hours) amount, the amount of sick leave available for IMRF purposes shall not be reduced, but shall not begin accruing again until such point as the employee has again accrued one hundred twenty (120) days (960 hours) of sick leave.

ARTICLE 13. LEAVES OF ABSENCE

- 13.1. Leave Without Pay for up to One Year.** The Director may grant a full-time employee who has completed his/her probationary period, or a part-time employee with five (5) or more years of continuous service, a leave without pay for a period not to exceed one (1) year when it is in the interest of the Library to do so. During the employee's approved leave of absence, his/her position may be filled by a limited term appointment, temporary promotion, or temporary reassignment of an employee. At the expiration of the leave without pay, the employee has the right to and shall be reinstated to the position he/she vacated if the position still exists; or if not, to any other vacant position in the same class.

Application for Reinstatement. Written application for reinstatement must be made within one (1) year from the beginning day of such leave without pay.

Leave Without Pay for Seven Days. A leave without pay up to seven (7) days shall be granted if prior request is made to the Director and/or Manager by the employee at least

- 13.5.2. Voting.** Employees shall be given time off without loss of pay for the purpose of voting when the polls are not open at least two (2) hours before or after the employee's scheduled hours of work.
- 13.5.3. Military Leave.** Military leave shall be granted to all employees for participation in the National Guard or the U. S. Armed Forces Reserves.
- 13.5.4. Required Duty.** Military leave for required duty or training for a period not exceeding fifteen (15) calendar days per year shall be granted without loss of pay when the returning employee submits to the Director a pay voucher for the military duty performed. The Library will then compensate the employee's regular pay less the amount of the voucher for the time absent from the Library.
- 13.5.5. Additional Military Leave.** Additional military leave without loss of pay shall be extended to ninety (90) days that would be renewable in thirty (30) day increments at the option of the Director.
- 13.6. Leave for Service Connected Injury.** An employee who suffers an on-the-job injury shall be allowed full pay during the first three (3) working days without the utilization of any accumulated sick leave or other benefits. Thereafter, the employee shall be permitted to utilize accumulated sick leave. In the event such service-connected injury becomes the subject of an award by the Industrial Commission, the employee shall reimburse the employer the dollar equivalent which duplicates payment received as sick leave days, and the employee's sick leave account shall be credited with the number of sick leave days used. An employee who suffers an on-the-job injury shall not be required to utilize any accumulated sick days prior to being granted an injury leave under Section 13.7 of the Union Contract and the Personnel Code.
- 13.6.3. On the Job Injury.** If an employee has an accident, sustains an injury, or becomes seriously ill, a Form 45 Employer's First Report of Injury or Illness will be filled out by the employee or another staff member or security officer witnessing the event, on behalf of the employee. The report will be given to the Business Manager or put in his/her mailbox if he/she is not at work at the time of the incident. The Business Manager will keep the original and provide a copy to the Library's insurance company, the employee's Manager, and the Chair of the Safety Committee.
- 13.7. Illness or Injury Leave.** All eligible employees who have utilized all their accumulated sick leave days, except as provided in Section 13.6 of the Union Contract and the Personnel Code, and are unable to report back to work because of the start of or continuance of their sickness or injury, including pregnancy-related leave, may receive a leave not to exceed one (1) year from the onset of the event with prior approval of the Director. At the discretion of the Director, library keys will be returned to the library and the employee will not have library computer or email access.
- 13.7.3. Verification.** During Illness or Injury Leave, the employee shall provide written verification by a person licensed under the Illinois Medical Practice Act or under similar laws of another state. Such verification shall show the diagnosis, prognosis and expected duration of illness. Such verification shall be

- 14.5. Social Security, Medicare, Federal, and State Income Taxes.** In accordance with state and federal law, Social Security (FICA), Medicare, federal, and state income taxes are withheld from all employees' paychecks.
- 14.6. Worker's Compensation.** All employees are covered by the State Worker's Compensation Act.

ARTICLE 15. UNIFORMS

- 15.1. Clothing.** Uniform requirements are set forth in accordance with Article 15 of the Union Contract. Personal Appearance and Image guidelines are provided to each employee upon hire. The Manager for each department may provide additional guidelines for their employees. Employees are expected to wear their library issued nametag during working hours. Security Officers will be required to wear a uniform shirt with proper identification. The Library will furnish the uniform shirt.

ARTICLE 16. NO STRIKE AND NO LOCKOUT

- 16.1. No Strike.** In accordance with Section 16.1 of the Union Contract, there shall be no strikes, work stoppages, sympathy strikes, or slowdowns.
- 16.2. No Lockout.** In accordance with Section 16.2 of the Union Contract, no lockout of employees shall be instituted by the Employer during the term of the Union Contract.

ARTICLE 17. PERFORMANCE REVIEWS

- 17.1. Informal Conferences.** Periodic informal performance review conferences between the employee and the Director and/or Manager to discuss work performance, job satisfaction, work-related problems, and the work environment are encouraged.
- 17.2. Written Performance Reviews.** The written performance review represents a formal record of an appraisal interview between the Director and/or Manager and the employee. In order to evaluate the abilities, performance, and potentialities of staff, a Director and/or Manager is required annually, but not later than the employee's anniversary date of employment in current position, to complete a performance review. The review shall be discussed with the employee, and the employee shall be given a copy of the review, have the opportunity to add comments, and shall then sign the review as recognition of having read it. Such signature shall not constitute agreement with the Performance Review. Performance reviews for new or probationary employees are made midway and at the end of the probationary period with additional reviews required if the probationary period is extended.
- 17.3. Discussion.** In case the Director and/or Manager finds serious fault with an employee during the probationary period, the matter will be frankly discussed with the employee during the evaluation. The employee may be given a chance to improve, or an opportunity in another assignment of similar grade when such arrangements can be made.

ARTICLE 20. UNION RIGHTS

20.1. Union Rights. Provisions related to Union Rights are set forth in accordance with Article 20 of the Union Contract.

ARTICLE 21. MANAGEMENT RIGHTS

21.1. Management Rights. The Library has and will continue to retain the rights and responsibilities to direct the affairs of the Library in all of its various aspects. Among the rights retained by the Library are the Library's rights to direct the working forces; to plan, direct, and control all the operations and services of the Library; to determine the methods, means, organization, and number of personnel by which such operations and services are to be conducted; to determine whether goods or services shall be made or purchased; to relieve employees due to lack of work or for other legitimate reasons; to make and enforce reasonable rules and regulations; to change or eliminate existing methods, equipment or facilities provided, however, that the exercise of any of the above rights shall not conflict with any of the express written provisions of the Union Contract.

ARTICLE 22. NON-DISCRIMINATION

22.1. Non-Discrimination. The Library and employees of the Library shall not discriminate against any employee on the basis of race, sex, creed, religion, color, age, national origin, disability, political affiliation and/or beliefs, sexual orientation, or other non-merit factors as provided by law.

ARTICLE 23. CDL POLICY

23.1. CDL Policy. The Library will pay for the difference in the cost of obtaining a Commercial Driver's License and a Class D License. This amount, net of the regular renewal rate, will be paid each time a new or renewed CDL is required. The Library will not demand reimbursement of these amounts from CDL employees who cease employment with the Library.

A new employee in the Outreach Department will have 45 working days in which to successfully obtain a CDL. If the license is not obtained within 45 working days, this may be cause for termination of a newly hired employee. Extensions may be granted at the discretion of the Director. An in-house employee who does not receive their CDL in 45 working days will be able to return to their previous position as governed by the union contract, Section 10.5. Section 10.5 will be adhered to with the additional stipulation of the 45 day requirement to obtain a CDL.

Employees who possess a required CDL for their job will be subject to random drug and alcohol testing as required by the City of Bloomington. Pursuant to the City Drug Test procedure, employees who fail to pass a drug or alcohol test will be terminated.

to become eligible to borrow books and other materials and (iii) "circulation records" includes all information identifying the individual borrowing particular books or materials.

(Source: P.A. 95-40, eff. 1-1-08.)

(75 ILCS 70/2) (from Ch. 81, par. 1202)

Sec. 2. This Act may be cited as the Library Records Confidentiality Act.

(Source: P.A. 86-1475.)

Procedures Related to the Library Records Confidentiality Act

The Library does not share information about customer transactions regarding materials borrowed, resources reviewed, or services used. Examples are whether a particular customer has a library card, what materials are or have been charged to a customer's library card, or a customer's use of library public access computers.

A customer must present his/her barcode number and personal identification number (PIN) either in person or on the telephone before any information will be given concerning: specific items charged out or specific items overdue. General information may be given to the customer such as the total fines on the account or how many items are checked out. If a person other than the customer requests information, staff will inform the person that library staff are only permitted to discuss specific information with the customer. If a person other than the customer has the library card and knows the PIN number for the account, staff will provide the information asked for or allow use of the customer's card. On the rare occasion that the customer has not set up or does not remember their pin, staff may use other information or identification for verification to allow access to the account.

Confidentiality applies to all, regardless of age. While the parent is asked to sign for financial responsibility on the library card application, this does not give the parent the right to information covered under the Library Records Confidentiality Act. BPL staff shall assume, if the parent knows the PIN associated with the account, it is permissible to share information with the parent.

Staff has access to confidential information from Library user accounts because of the nature of their work. This information is to be kept confidential. Employees hold positions of public trust. All employees must respect the sometimes private and sensitive nature of information to which they are privy, or to which they may have access. To assure confidentiality of information, employees may not disclose, use, remove, record, or copy confidential information unless required to do so in the course of Library business or by law.

Employees may not use information obtained through their employment with the Library for their personal gain or profit, or for the profit of others, during or after their employment with the Library.

Lost Cards

Lost or stolen library cards must be reported immediately. There is a minimal charge to replace a library card.

Borrowing Privileges

Borrowing privileges, in-house computer use and remote access to databases will be suspended when accrued fines and fees equal or exceed ten dollars (\$10.00). These privileges will be restored when the amount owed is below ten dollars (\$10.00).

Interlibrary loan service is available only to residents of the City of Bloomington and the Golden Prairie Library District. Charges for lost or damaged material provided through interlibrary loan is determined by the lending library and will include, but not be limited to, replacement cost, fines and processing fees.

Lost or Damaged Materials

Cardholders are responsible for loss or damage to materials they borrow, including cases and supplemental contents. Current replacement cost will be charged for materials that are lost or too badly damaged to remain in the library collection.

3.3 Loan Periods

Check out lengths of Library materials is as follows:

- | | |
|--|---------|
| • Books, Audiobooks, CD's, Bookmobile items: | 3 Weeks |
| • New Fiction, Magazines: | 2 Weeks |
| • DVDs, Videos, Video Games | 1 Week |

3.4 Fines and Fees

The Bloomington Public Library charges fines as an incentive for customers to return materials in a timely manner so that other customers can have access to the items. The Bloomington Public Library charges fees to offset the cost of recovering and replacing lost and damaged library materials.

Overdue Fines:

Items not returned by the due date will be charge as follows:

- | | |
|---|------------------------------|
| • DVDs, Videos, Video Games, Art Prints | \$0.50 Daily/Maximum \$10.00 |
| • Books, Audiobooks, Magazines, CDs | \$0.10 Daily/Maximum \$5.00 |

No fines are charged on the days the Library is closed.

When a Bloomington Public Library cardholder wants material that is not available within Bloomington Public Library, we ask other agencies to provide it. This is the process of interlibrary loan.

Bloomington Public Library follows state and national interlibrary loan procedures and protocols wherever applicable. The library initiates and responds to loan requests via OCLC and fax. The library requests items through interlibrary loan for Bloomington Public Library cardholders only. Those who are not Bloomington or Golden Prairie residents, are referred to their home library for service. All Illinois libraries offer interlibrary loan service, as mandated by the Illinois State Library.

The Bloomington Public Library will borrow and loan materials to libraries in the United States. These items include books, magazine article photocopies, audio books on cassette, CD or MP3 that are older than one year, music on CD older than one year, and VHS tapes. DVDs and Blue Rays older than one year will be loaned in-state only. The library will also borrow microfilm on your request. Some items are difficult to borrow or lend; these include, but are not limited to: new books, reference materials, entire issues of magazines, and rare or fragile items. At this time, the library does not borrow or lend System Games and some local history items. DVD and Blue Ray have a "no renewal" policy.

Materials borrowed through interlibrary loan have a circulation period which is determined by the lending library, not Bloomington Public Library, and most interlibrary loan items are checked out to customers for two weeks. The ability to renew interlibrary loan items is also determined by the lending library. When a renewal is requested by the customer, the interlibrary loan coordinator seeks the lending library's approval prior to granting the renewal.

The service is free, but some libraries charge a fee to loan their materials. If that's the case, the customer is notified before obtaining the item. Bloomington Public Library is a member of LVIS (Libraries Very Interested In Sharing), a cooperative agreement between libraries to loan without charges.

Just as with regular library materials, customers are financially responsible for any damage or loss of interlibrary loan items, including fines when items are kept overdue. When Bloomington Public Library is lax in returning materials borrowed through interlibrary loan, the library can lose the privilege of borrowing materials for any of its customers. It is crucial, therefore, that materials borrowed through interlibrary loan be returned in a timely manner and in the same condition. Habitual failure to do so may result in individual loss of the privilege in order to preserve the privilege for other library customers. Interlibrary loan requests are treated as holds and count within the established hold limit on all library materials.

Manager, in conjunction with the Home Delivery coordinator, will consider the circumstances of the situation and may charge the customer for the items.

*****The library reserves the right to cease the sending of certain materials or to discontinue a customer's service altogether, should lost or damaged items become an ongoing issue.*****

Maximum time to be accorded in-person customers will be determined by the pace of the activity in the reference area, the number of available staff, and the staff member's discretion as to the customer's needs. When the demands of service exceed the available staff's resources, telephone inquiries shall receive a taped message asking that the customer call again at another time.

Telephone reference should be used for short, factual information questions. If callers must wait, they should be given the option to remain on hold or to have their calls returned. When a staff member must transfer a call to another department, the caller should be told where the call is being transferred and why.

Information services staff use professional judgment in supplying reliable sources, but they do not provide personal interpretations and recommendations, especially in the subject areas of law, medicine, consumer information, personal finance, and tax information.

Since particular kinds of questions are often problematical and place unusual demands on reference service, general guidelines are here stated in order to clarify for both staff and our customers the level of assistance that can reasonably be expected in these areas:

Book, Antique, and Art appraisals: Customers seeking appraisals will be referred to standard print or online price guides and/or encouraged to consult appropriate professional services.

Customers' Equipment: Information services staff are not able to troubleshoot our customers' personal equipment, such as laptops, digital cameras, cell phones, and other devices.

Genealogical Questions: Information services staff will provide general assistance in genealogical research, guidance in locating items in the collection, both in print and electronically, and instruction in the effective use of our resources. Information services staff do not engage in actual genealogical research for customers.

Translations: Full text translations of documents will not be provided by the Library. Translations of individual words or phrases, as available in foreign language dictionaries or from the expertise of individual staff members, will be provided.

School Assignments: School assignments will be treated within the same parameters of service stated above.

In supplying information services, staff comply with copyright law and other applicable restrictions on the use of library materials. Standard copyright guidelines/notice will be attached to any pages faxed or mailed to a customer.

When unable to supply information from onsite or online resources, information services staff utilize interlibrary loan services or provide referrals to appropriate agencies or to other libraries.

Loan of reference materials

3.7.1 Research Request Form

Bloomington Public Library
Box 3308, 205 East Olive Street, Bloomington, IL 61702-3308
(309) 828-6091

<http://www.bloomingtonlibrary.org>

Hello,

We have conducted a search in response to your research request. The research fee is \$5.00 for each 30 minutes of searching, plus the cost of copies (\$0.15/page). For additional research requests, please call the Reference Desk, (309) 557-8941 or (309) 557-8942. Or email us: reference@bloomingtonlibrary.org.

_____ Microfilm copies totaling \$ _____

_____ Photocopies totaling \$ _____

_____ We checked the resources of our collection and/or several issues of *The Pantagraph*, and found no information.

_____ If you would like to pursue a genealogy search, please contact:

McLean County Genealogical Society

P. O. Box 488

Normal, IL 61761-0488

<http://www.mcgs.org/Resources.htm>

or

Lexington Genealogical & Historical Society

318 W. Main Street

Lexington, IL 61753

<http://www.lexingtonillinois.org/fort/>

Please advise them of your search through our services.

_____ If you would like to pursue a McLean County history search, please contact:

McLean County Museum of History

200 N. Main Street

Bloomington, IL 61701

http://www.mchistory.org/mcmh_research_si_library.html

Please advise them of your search through our services.

_____ If you would like to pursue historical records from Illinois, please use the following website:

<http://www.cyberdriveillinois.com/departments/archives>

Research fee	\$ _____
Microfilm copies	\$ _____
Photocopies	\$ _____
Total Amount Due	\$ _____

Please send your check made payable to:

Bloomington Public Library
Business Office – Research Fee Payment
P. O. Box 3308
Bloomington, IL 61702-3308

4. Materials

4.1 Material Selection and Collection Development Policy

Approved July 21, 2009; Revised February 16, 2010; Revised August 16, 2011

This policy has been adopted by the Bloomington Public Library to guide collection decisions and to make information about the library collection available to library staff and customers. The Material Selection Policy is approved and endorsed as the official policy of the Bloomington Public Library and the Board of Trustees and is reviewed biennially.

1. Mission

The primary objective is to select material that supports the Library's mission statement.

We provide our diverse community with a helpful and welcoming place that offers equal access to the world of ideas and information and supports lifelong learning.

2. Responsibility for Selection

Authority and responsibility for selecting library material is delegated to the Library Director by the Library Board of Trustees and is, in turn, delegated to the librarians on staff. Any material so selected shall be held to be selected by the Board of Trustees.

The Bloomington Public Library Board of Trustees endorses and accepts as part of the Materials Selection Policy the following documents:

- Library Bill of Rights*
- Access for Children and Young Adults to Nonprint Materials*
- Access to Digital Information, Services and Networks*
- Access to Library Resources and Services Regardless of Gender or Sexual Orientation*
- Challenged Materials*
- Diversity in Collection Development*
- Evaluating Library Collections*
- Expurgation of Library Materials*
- Free Access to Libraries for Minors*
- Restricted Access to Library Materials*
- Labeling and Rating System*
- Universal Right to Free Expression*
- Freedom to Read*
- Freedom to View**

These documents are available on the American Library Association website, www.ALA.org.

*These documents are promulgated, adopted and interpreted by the American Library Association.

**This document is adopted by the American Film and Video Association and endorsed by the American Library Association.

6. Critics' and staff reviews
7. Timeliness of the material
8. Availability and suitability of format

Selections will not be made on the basis of any anticipated approval or disapproval, but on the merits of the material in relation to the building of the Library's collections and in support of its stated mission. Purchase suggestions from customers are welcome and are given serious consideration.

A library cannot provide all materials that are requested. Therefore, interlibrary loan is used to obtain from other libraries those materials that are beyond the scope of this library's collection.

4. Gifts

A gift to the Library may consist of material or funds for the purchase of material. In order to be added to the Library's collections, gift material must meet the same criteria as purchased material. Gifts not added to the collection will be donated to the Friends of the Library for sale. The Library accepts restricted funds only if the material to be purchased has been jointly approved by the donor and the Library.

Gifts are accepted subject to the following limitations:

1. The Library retains full and unconditional ownership of all gifts.
2. The Library makes the final decision on the use, display, housing, access, withdrawal, or other disposition of all gifts.

5. Areas of the Collection

The collection is organized into three broad areas: Adult, Children's and Outreach. Responsibility for the selection of materials for each department is further divided and delegated. Using Section 3 of this policy as their guide, the librarians determine the appropriate parameters, objectives, and criteria for the material selections in their assigned areas. Collection development paragraphs, written by the librarians/selectors, elaborate the detail of the selection approach for what is purchased for each collection area. These paragraphs are available upon request.

Adult Collection

Materials are collected in many formats. Collections are grouped to allow customers to browse and to find items easily using a call number; collections are grouped by format, by genre and/or by topic.

Selection resources used vary widely, but include professional journals, awards lists and customer requests.

Children's Collection

Providing current, popular, educational, and notable materials for preschoolers through middle school students as well as for parents, teachers, and others interested in children's literature, the children's collection consists of recreational and informational materials that foster a love of reading. The library tries to anticipate and to meet the diverse skills and interests of readers at all ages from the preschooler to the beginning reader to the child ready for more advanced resources.

Obsolete formats may no longer be purchased and will be withdrawn as technologies and access change.

Consideration is given to ensure that a core collection of definitive works in a given subject area are retained regardless of condition or circulation. Worn or damaged items are identified for weeding on a continual basis. While items are replaced, the library's policy is not to automatically replace titles discarded, lost, or withdrawn. In each case, the need for replacement is based on the existence of adequate coverage of the subject, the timeliness of the title in question, the demand for the specific title, and the availability of the item. Important works in poor condition may be repaired, if possible.

WorldCat, Public Library Catalog, Fiction Catalog, Children's Catalog and other similar sources are consulted before the last copy of a title in the library is withdrawn. The collection is not, however, archival and is reviewed and revised on an ongoing basis to meet current needs. Titles in some areas of the collection go Lost Assumed or Missing frequently due to theft or customers keeping them. A title is replaced up to 3 times.

Materials which have been withdrawn and are in good condition will be given to the Friends of the Library for its book sale. No items can be held for or given to individuals for personal use.

Adult Services

Using the CREW Method mentioned above, Adult Services staff weed material from the adult and teen collections in the Main library.

Each selector follows a monthly weeding schedule to assure that collections are reviewed – shelf by shelf – on a rotating and regular basis. Smaller collections are reviewed each year. Larger collections (such as Nonfiction) are reviewed every three years. Reports generated by the integrated library system [SIRSI] support weeding.

In addition, staff in Circulation and shelveers review items for condition when checking in and when shelving. Items in poor condition are set aside for immediate review by the selector.

The Illinois Collection, while reviewed, has very limited, if any, deselection. Items may be offered to the McLean County Historical Museum Library or the Friends of the Bloomington Public Library for special sale.

Titles remain in the Most Wanted collection for approximately 9 months. If the shelves become crowded, prolific authors may be weeded so that only the most recent title is included. Copies that are removed from the Most Wanted collection are either added to the fiction collection or are removed from the collection altogether based on the condition of the item and demand for the title.

Statistics from our website ("click throughs") and from the vendor (number of searches and other statistics) are used to determine if the cost per use is reasonable and viable to renew or cancel the online resource.

Children's Services

Books for the youngest customers are reviewed and replaced at least annually and often more frequently because of their heavy use. Picture book and beginning reader titles may be replaced many times over the years because of condition. Fiction books for older readers will be evaluated every three years. Condition, circulation figures, and literary merit are considered. All fiction titles that have not been checked out in three years may be weeded.

Nonfiction is weeded at least every three years to update information. Items not checked out in

- Access for Children and Young Adults to Nonprint Materials*
- Access to Digital Information, Services and Networks*
- Access to Library Resources and Services Regardless of Gender or Sexual Orientation*
- Challenged Materials*
- Diversity in Collection Development*
- Evaluating Library Collections*
- Expurgation of Library Materials*
- Free Access to Libraries for Minors*
- Restricted Access to Library Materials*
- Labeling and Rating Systems*
- Universal Right to Free Expression*
- Freedom to Read*
- Freedom to View**

These documents are available on the American Library Association website, www.ALA.org.

*These documents are promulgated, adopted and interpreted by the American Library Association.

**This document is adopted by the American Film and Video Association and endorsed by the American Library Association.

PROCEDURES:

FORM I, "COMPLAINT ABOUT LIBRARY MATERIAL"

FORM II, "REQUEST FOR RECONSIDERATION OF LIBRARY MATERIAL"

If Bloomington Public Library (BPL) users wish to file a complaint about library material, Form I, "Complaint about Library Material," should be completed. This form stays on file with the Department Manager; a copy of the form will be submitted to the Director. The Department Manager may examine the material, as well as critical reviews of the material.

If Bloomington and Golden Prairie residents wish to have materials reconsidered (as opposed to filing a complaint without definite action), they may fill out Form II, "Request for Reconsideration of Library Materials."

When Form II is completely filled out and returned to the Library, it will be submitted to the Library Director. The Director will initiate the review process. The Director, the appropriate Department Manager and other staff designated by the Director will review the completed form and the material to determine whether the material should remain or be removed from the collection.

4.1.1 Request For Reconsideration of Library Material Form

FORM II: REQUEST FOR RECONSIDERATION OF LIBRARY MATERIAL

Author/Performer of Material:

Material Title: _____

Publisher/Distributor of Material:

Library Call Number: _____ Date of Material: _____

Your Name: _____

Address: _____

Telephone: _____

Are you a BPL cardholder? _____

Request Represents:

_____ Individual

_____ Organization; list name: _____

If your answer is YES, please specify:

What would you like the library to do about this material?

Can you recommend other material that would convey as valuable a picture and/or perspective of the subject treated? If yes, please specify:

Date: _____ Signature: _____

FOR OFFICE USE ONLY

Date Form II received: _____ Staff initials: _____

Decision: _____ Decision date: _____

Date requestor was notified of decision: _____

Dept. Manager signature: _____

Attachments: _____

In such instances involving minors, identification of the child and the parent/guardian will be requested, and the incident may be reported to the parent or guardian.

Section 3.

If, following a request for behavior modification, the customer fails or refuses to comply or responds abusively to the request, he or she will be required to leave the library premises immediately for the balance of that calendar day. If such incident occurs after 6 p.m. the customer will be required to leave for the remainder of the day and for the following full calendar day. If he or she fails to leave, the police will be summoned. Examples of such behavior resulting in a one-day suspension would include, but are not limited to, sleeping, on-going loud/unruly behavior of an individual or group, misuse of cell phones, entering without shoes or shirt, inappropriate language or gestures, argumentative behavior with staff or other customers, etc.

For incidents of computer/Internet abuse or other incidents of a more serious nature, the customer will immediately be suspended for one month. Examples of more serious offenses include, but are not limited to, public urination or exposure, stalking of customers or staff, physical altercations with customers or staff, threatening behavior towards customers or staff, display of a weapon, intoxication or under the influence of drugs, etc. Computer/Internet abuse incidents involving children (up through age 11) will have the suspension period determined on a case-by-case basis, taking into consideration any prior offenses and the ability of the child to understand the nature of the offense.

Section 4.

The library's security officers will record instances in which customers are required to leave the library in a database maintained by the library for that purpose. Upon the SECOND recorded instance in which a person is required to leave the library premises within a thirty-day period, the security officer, on behalf of the Director and Board of Library Trustees, shall bar the customer from use of library premises for a period of thirty days. A written notice stating the period of suspension will be given to the customer at this time. Parents or guardians of minors will be notified in writing after the SECOND recorded instance in which a minor is required to leave the library and advised of the consequences of any further recorded instances. If a THIRD incident occurs during the thirty-day suspension period or during the subsequent thirty days after the end of the suspension period, the customer will be suspended for one year and will be given written notice of the suspension period. Exceptions to these standard progressive periods of suspension will be determined by the security officers in consult with the Director, based on the seriousness of the offense, and on a case-by-case basis. For example, if the offense constituted a crime or violation of a City ordinance, the suspension period could be longer.

Section 5.

Customers wishing to appeal suspensions of a month or more may do so upon written request to the Director or the Director's Designee, and parents wishing to appeal such action on behalf of their children may do so upon written request to the Director or the Director's Designee. Appeal forms can be obtained in person or by sending a written request to the Business Office. Completed forms should be mailed to the Business Office. Appeal forms will be submitted to

The following are **not permitted** in the library:

- tobacco and smoking of any kind
- pets or animals, other than authorized service animals
- extensive personal grooming
- solicitation of any kind
- persons under the influence of alcohol or illegal drugs
- disorderly, disruptive, or boisterous conduct
- threatening, harassing, or intimidating language or behavior
- dozing, sleeping, or loitering
- weapons or other items the general public views to be threatening

Failure to abide by these rules of conduct may lead to a suspension of your Library privileges.

The library reserves the right to respond to any and all conduct not expressly set forth herein.

5.4 Unattended Child Policy

Board Approved 7/22/02; Revised 8/19/08

The Bloomington Public Library is committed to helping all children with activities related to the Library. However, it is not the responsibility of staff to serve as caregivers, disciplinarians or teachers. Children, just as all library customers, are subject to all Library rules and policies concerning behavior, conduct, and demeanor. And it is the responsibility of *parents/caregivers*, by monitoring and regulating the behavior of their children, to assure that their children abide by these policies at all times.

Therefore, the staff will try to notify the parent/caregiver of an unattended child whenever:

The child is not meeting the Library's Patron Expectations.

The child's behavior disturbs other users of the library.

The child's health or safety may be in danger.

The child is frightened or anxious while alone at the library.

If the parent /caregiver cannot be reached, then the Library will contact the Bloomington Police Department or Child Protective Services as deemed appropriate by the staff.

In the event that a young person is still at the Library 15 minutes after the Library closes to the public and an attempt has been made to contact the parents, the security guard will contact the police. In no instance will staff take the young person home.

1.5 Policy Regarding Display Space

Board Adopted April 22, 2008

Bloomington Public Library adheres to the American Library Association (ALA) Library Bill of Rights and the ALA's interpretation of the Library Bill of Rights entitled, "Exhibit Spaces and Bulletin Boards."

Library Parking: Free parking in the lot is available; under the overhang area is available for attendees with disabilities; free street parking along Prairie Street; and the lower level parking lot is available on evenings and weekends.

General Meeting Room Policies:

(These apply to all meeting rooms)

- 1) Use of Library meeting rooms does not constitute Library endorsement of or viewpoints expressed by participants in the program.
- 2) The Library and its affiliates have first priority on use of the meeting rooms. Other requests will be considered in the order in which they were received.
- 3) Groups/organizations using the meetings rooms must comply with all applicable local, state, and federal laws, such as hiring an interpreter or providing auxiliary aids required under the Americans with Disabilities Act when requested by the public.
- 4) A pay phone is available on the Main Level near the entrance door.
- 5) All groups/organizations are responsible for reimbursing the Library for any damages, unusual cleaning expenses, or security measures related to the meeting. The meeting rooms should be left in the same condition in which they were found.
- 6) Group/organization attendees are subject to the "Expectations of Persons Using the Library."
- 7) Candles or any open flames are prohibited.
- 8) Smoking and alcohol are prohibited throughout the building.
- 9) No tacks, nails, or tape are to be placed in or on doors, walls, windows, or furniture. The Library will allow use of its bulletin boards or easels, if requested.
- 10) The group/organization is responsible for the supervision of all children who may accompany its members. Children should remain with the group or be supervised by an adult who must remain with them.
- 11) The Library assumes no responsibility for private/personal belongings.
- 12) The Library assumes no responsibility for personal injury to any person or damage to the property of others.
- 13) The meeting rooms are not available for private parties or social events.
- 14) Groups/organizations are not allowed to use the Library as their official mailing address.
- 15) The Library reserves the right to cancel a meeting because of weather related or building emergencies.
- 16) The Library staff or security personnel will monitor the use of the meeting rooms and enforce all policies.
- 17) Meetings that may become disruptive to normal Library operations must end immediately.
- 18) Failure to abide by these policies and procedures will jeopardize future meeting room use.

Community Room Use:

- The Library reserves the right to cancel prior reservations when the Community Room is needed for Library or City of Bloomington purposes.
- Seats approximately 100 in chairs (auditorium style) or 50 at tables (classroom style).

- If a group does not show up within 15 minutes of the reserved start time, the room may be given to others that ask for it.
- If a room is not reserved or in use, small groups or individuals may request it.
- For reservations and questions, contact Adult Services, 828-6093 or at reference@bloomingtonlibrary.org

5.8 Video Surveillance Policy

Approved 1/21/2014

The Library uses security cameras to help document events involving the safety and security of Library users and property. The security camera installation consists of dedicated cameras which may provide real-time surveillance through a video management system. The primary use of security cameras is to discourage inappropriate and illegal behavior and to enhance the opportunity to apprehend offenders.

Signage

The Library shall post and maintain signs at the public entrances to the building giving notice of the use of security cameras for monitoring and recording activity in public areas of the Library property.

Camera Location

Cameras are installed and located in areas that are prone to theft or other activities that violate Library policy or criminal law. Cameras monitor all entrances and exits to the Library.

Access to Digital Images

Video data is recorded and stored digitally on a network attached storage array. Recorded data is considered confidential and secure. Access to the recorded archival data is limited to the following authorized individuals: Library Director, Information Technology Manager, Support Services Manager and Security Staff and others at the discretion of the Library Director. Periodic checks are made by the Information Technology Manager and Support Services Manager to ensure proper operations of the system.

Access by Law Enforcement and Patron Privacy

Video surveillance records are not to be used directly or indirectly to identify the activities of individual Library patrons except as viewed in relation to a specific event or suspected criminal activity, suspected violation of Library policy, or incidents where there is reasonable basis to believe a claim may be made against the Library for civil liability. Authorized individuals may use a still shot or selected portions of recorded data to request law enforcement for assessing the security risk of a specific individual or for investigating a crime on Library property.

Video data will be made available to law enforcement officials or agencies upon presentation of a valid subpoena or pursuant to court order. The Library shall retain a copy of the subpoena or court order and documented evidence of the date and sufficiency of the Library's compliance

- Not trap or restrict your options for movement

Fight

- As a last resort, only if your life is in danger, attempt to incapacitate the shooter
- Act with physical aggression
- Improvise weapons
- Commit to your actions

911 – When Law Enforcement Arrives

- Remain calm and follow instructions
- Keep your hands visible at all times
- Avoid pointing or yelling
- Know that help for the injured is on its way

Action:

Upgrade Public and staff computers as determine by the replacement schedule. Move computer replacement to a 3 year cycle.

Expand the use to laptops throughout the library to offer the customers more mobility within the library. The library currently has 5 laptops to loan to the public. This number should be expanded and the number of stationary PCs should decline over time.

Expand the use of self-checks by adding one in the Childrens and Adult Services areas on the second floor. Expanding the use of self-checks on the second floor will help reduce the lines at the circulation desk and will better serve customers with small children.

Look into a software solution that resolves issues with updates not being able to be installed while maintaining PC security.

Look at technology to improve the ease of using the community room. A new projector will allow for easier connectivity with laptops which will make it easier for staff to be able to setup programs. The Receiver often overheats and causes the sound to distort and randomly shuts down.

Look into technology that allows patrons to keep money on account with the library in order to pay fines or use the printing services. This would be helpful to allow for patrons to keep money available for themselves and for their family for printing and paying small fines. With the credit card payments system there will be a minimum amount that will be allowed to be charged, this system will allow them to pay their fines and keep the amount up to the minimum on account.

Staff Services

Goal: Provide the staff with the necessary technological tools to provide the very best service experience for the customer.

Actions:

Upgrade the Staff PCs and printers per the designated replacements schedule. The PCs should be upgraded every three years and the printers should be upgraded every 6 years. By doing this the equipment should all remain under maintenance.

Look for opportunities to increase the bandwidth that is provided by the Illinois Century Network. The biggest bottleneck for the staff network is the ICN connection. This connection needs to be a fiber optic connection within the next three years.

Perform one major upgrade and 4 minor upgrades to the SirsiDynix ILS during the course of the year. This is important to be able to take advantage of newer features and software available third party vendors.

Look into a fire prevention system for the data center. Currently the data center does not have a fire prevention system.

Allow for more interaction with their library account through the web site. Make it easy for customers to be able to change their email address on their library account.

Allow customers to be able to pay for their fines online. This is a necessary addition to the self-check machines.

Organize the web site into an easy to use tool to gain access to information.

Allow customers to register for library cards over the internet.

6.2 Computer Usage Policy

Approved August 16, 2011

The Bloomington Public Library provides both a wireless internet and dedicated computers to allow customers access to resources that reside both locally and remotely. The library employs the latest antivirus, monitoring, and filtering technology in order to provide an experience that is positive, productive, and safe for all customers. This document is meant as a guide to ensure that all customers have equal access to all the information that technology can provide.

Access and Areas

There are several different public computer access areas within the library. Each area has software and technology that is appropriate for each age group. To find which area has technology best suited for you or your children, please refer to the Bloomington Public Library age usage guide.

To ensure that everyone gets an opportunity to use the computers, the library utilizes reservation software. This software assigns an available time slot either immediately or at a future time when a computer will be available for use. The reservation system requires that you have a valid library card. If you do not have a card or are not eligible for a Bloomington Public Library card please consult with one of the librarians about getting a library card or Ecard.

The library also provides catalog computers. The catalog computers provide access to the BPL online catalog and a large collection of online databases to which the library subscribes. The catalog computers do not have time limits and are available to all library customers.

There are several printing stations located throughout the library. These stations allow customers to print on a per cost basis. Printing is available from any library computer regardless of location.

Filter and Monitoring

All computers connecting to the Bloomington Public Library network are filtered. This filter is designed to restrict access to materials that are not appropriate for a public place such as the library. No filter is able to block every offensive site and it is the expectation that if a customer finds themselves on an inappropriate site that they immediately close the window containing the offensive material. Failure to do so will result in loss or suspension of computer privileges.

Technology resources are considered BPL property and BPL has the right to monitor the use of such property at any time. Therefore, users should not have any expectation of privacy as to their Internet usage via BPL computers and networks.

- The primary purpose of computer use is to conduct official business. Employees may occasionally use the resources for individual purposes on their own personal time (e.g., breaks & meal periods), if such use does not violate the terms and conditions of this policy or interfere with BPL business. This does not extend to staff's family and friends. They should schedule time on public access computers.
- Sexually explicit or otherwise generally considered inappropriate materials are not allowed. If a staff member accidentally connects to a site that has offensive (sexually explicit or otherwise generally considered inappropriate) material, he/she must disconnect from that site immediately.
- All printing for personal use should be paid for just as when making a personal photocopy.
- Use of computer resources for personal gain or unauthorized personal business is prohibited.

Users of BPL technology resources may not use these resources for inappropriate, unauthorized, or illegal uses.

The use of technology resources is a privilege, not a right, and the Library may revoke this privilege at any time for misuse. Inappropriate uses of Library resources may result in discipline up to and including discharge from the Library. Suspected illegal acts involving technology services may be reported to state and federal authorities, and may result in prosecution by those authorities. Any questions concerning the appropriate use of any of the technology resources or relevant Library policies should be referred to the Director.

6.4 Laptop Usage Policy

Approved October 15, 2013

Laptops like desktop computers are reserved through Envisionware. Customers will agree to the following agreement when they log onto a library laptop:

Bloomington Public Library is pleased to offer a laptop service to Library customers 17 years of age and older. Laptops are available from the Adult Service Desk and may be used inside the library only. Laptops are available on a first-come, first-served basis. They can be reserved through the Envisionware software. Customers are only allowed to borrow one laptop at a time for a 90-minute period per day. Laptops must be returned 15 minutes before closing of the Library. Laptops therefore will not be checked out if there is less than half-hour of time left before the Library closes.

A laptop can only be checked out by a customer with a valid Bloomington Public Library card or a reciprocal borrowing library card in the Bloomington Public Library computer system.

Library. Please read the following policy carefully as it discusses Bloomington Public Library's rules and regulations regarding Internet use in the library and in compliance with federal law. Your cooperation is appreciated.

Users Guide to the Internet as a Resource

The Internet has become an invaluable tool for research, communication, and entertainment. The Internet, however, is a collection of information neither produced nor endorsed by Bloomington Public Library ("Library"). Please keep the following in mind.

1. Information obtained via the Internet may or may not be reliable.
2. Information obtained via the Internet may or may not be accurate.
3. Information obtained via the Internet may or may not be current.
4. Information obtained via the Internet may be considered controversial or offensive by some Library customers.
5. The Internet is not a private medium, and the Library can not guarantee the privacy of any communication, access or electronic transfers.

The Library encourages all library customers to be informed users of the Internet and carefully evaluate any information obtained via the Internet. Library staff members may help you evaluate certain types of Internet sources but are not trained to provide definitive analysis of specific sources or sites.

The Library is not responsible for damages, indirect or direct, arising from a customer's reliance, citation, or other utilization of Internet information resources.

Internet Filtration

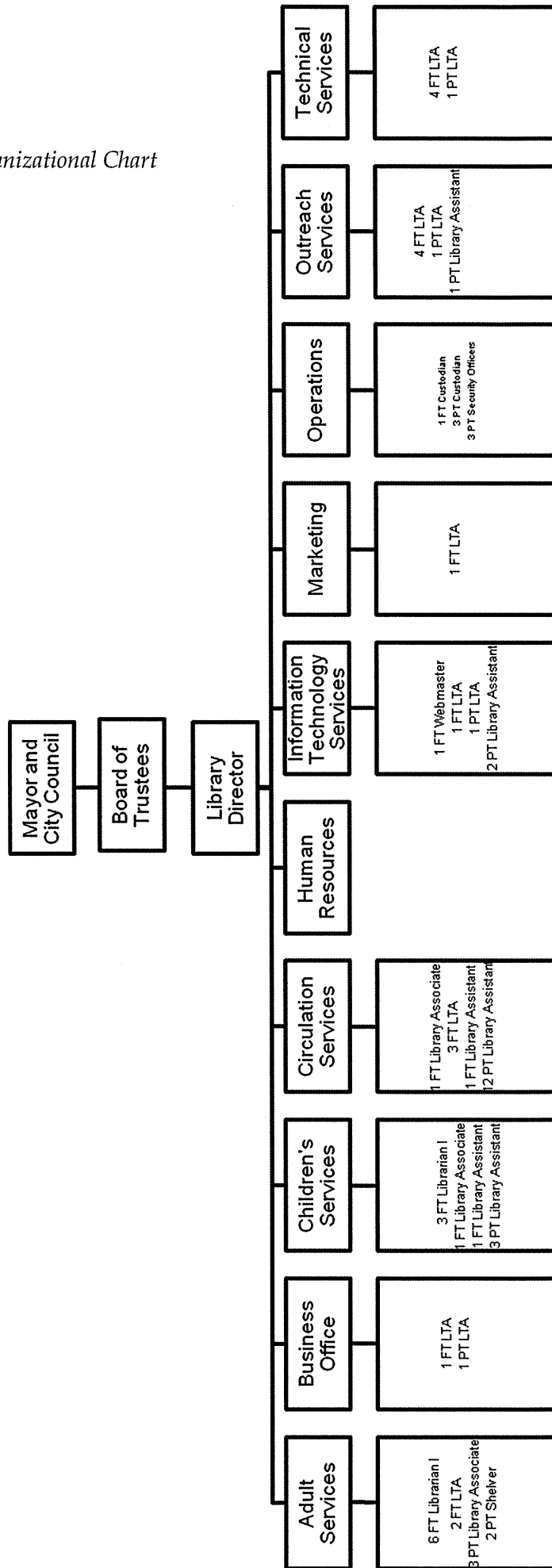
All Library computers are equipped with Internet filtration devices which are designed and intended to block sites deemed to be inappropriate for general audiences. All Internet filtration devices installed on Library computers have been purchased from a commercial vendor. The Library does not maintain that the installed filters effectively filter all or any inappropriate materials from access within the Library. If offensive or sexually explicit material does escape the filter, it is the patron's responsibility to exit the offensive site. The Library is not responsible for damages, indirect or direct, arising from access, whether voluntarily or involuntarily requested, to inappropriate or offensive Internet sites within the Library, regardless of the age of the user or whether arising from the deficiency of the filter or its installation.

Access and Use of the Library's Internet Connections and Networks by Patrons

The Library recognizes that electronic information on the Internet may contain material that is inappropriate or offensive to children as well as patrons of all ages. The Library requires that all Library customers using the Library's Internet connection do so within the guidelines of appropriate and acceptable use. The following are unacceptable:

1. Any use of electronic information which results in the harassment of others;
2. Use of electronic information networks in any way which violates a Federal or State law;
3. Unauthorized duplication of protected software or licensing agreements, including but not exclusively, any "hacking;"

Appendix A Organizational Chart



The General Assembly further recognizes that technology may advance at a rate that outpaces its ability to address those advances legislatively. To the extent that this Act may not expressly apply to those technological advances, this Act should nonetheless be interpreted to further the declared policy of this Act that public records shall be made available upon request except when denial of access furthers the public policy underlying a specific exemption.

This Act shall be the exclusive State statute on freedom of information, except to the extent that other State statutes might create additional restrictions on disclosure of information or other laws in Illinois might create additional obligations for disclosure of information to the public.

(Source: P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/1.1) (from Ch. 116, par. 201.1)

Section 1.1.

This Act may be cited as the Freedom of Information Act.

(Source: P.A. 86-1475.)

(5 ILCS 140/1.2)

Section 1.2.

Presumption. All records in the custody or possession of a public body are presumed to be open to inspection or copying. Any public body that asserts that a record is exempt from disclosure has the burden of proving by clear and convincing evidence that it is exempt.

(Source: P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/2) (from Ch. 116, par. 202)

Section 2.

Definitions. As used in this Act:

(a) "Public body" means all legislative, executive, administrative, or advisory bodies of the State, state universities and colleges, counties, townships, cities, villages, incorporated towns, school districts and all other municipal corporations, boards, bureaus, committees, or commissions of this State, any subsidiary bodies of any of the foregoing including but not limited to committees and subcommittees thereof, and a School Finance Authority created under Article 1E of the School Code. "Public body" does not include a child death review team or the Illinois Child Death Review Teams Executive Council established under the Child Death Review Team Act.

(b) "Person" means any individual, corporation, partnership, firm, organization or association, acting individually or as a group.

(c) "Public records" means all records, reports, forms, writings, letters, memoranda, books, papers, maps, photographs, microfilms, cards, tapes, recordings, electronic data processing records, electronic communications, recorded information and all other documentary materials pertaining to the transaction of public business, regardless of physical form or characteristics, having been prepared by or for, or having been or being used by, received by, in the possession of, or under the control of any public body.

(c-5) "Private information" means unique identifiers, including a person's social security

copying by the public.
(Source: P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/2.10)

Section 2.10.

Payrolls. Certified payroll records submitted to a public body under Section 5(a)(2) of the Prevailing Wage Act are public records subject to inspection and copying in accordance with the provisions of this Act; except that contractors' employees' addresses, telephone numbers, and social security numbers must be redacted by the public body prior to disclosure.

(Source: P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/2.15)

Section 2.15.

Arrest reports and criminal history records.

(a) Arrest reports. The following chronologically maintained arrest and criminal history information maintained by State or local criminal justice agencies shall be furnished as soon as practical, but in no event later than 72 hours after the arrest, notwithstanding the time limits otherwise provided for in Section 3 of this Act: (i) information that identifies the individual, including the name, age, address, and photograph, when and if available; (ii) information detailing any charges relating to the arrest; (iii) the time and location of the arrest; (iv) the name of the investigating or arresting law enforcement agency; (v) if the individual is incarcerated, the amount of any bail or bond; and (vi) if the individual is incarcerated, the time and date that the individual was received into, discharged from, or transferred from the arresting agency's custody.

(b) Criminal history records. The following documents maintained by a public body pertaining to criminal history record information are public records subject to inspection and copying by the public pursuant to this Act: (i) court records that are public; (ii) records that are otherwise available under State or local law; and (iii) records in which the requesting party is the individual identified, except as provided under Section 7(1)(d)(vi).

(c) Information described in items (iii) through (vi) of subsection (a) may be withheld if it is determined that disclosure would: (i) interfere with pending or actually and reasonably contemplated law enforcement proceedings conducted by any law enforcement agency; (ii) endanger the life or physical safety of law enforcement or correctional personnel or any other person; or (iii) compromise the security of any correctional facility.

(d) The provisions of this Section do not supersede the confidentiality provisions for arrest records of the Juvenile Court Act of 1987.

(Source: P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/2.20)

Section 2.20.

Settlement agreements. All settlement agreements entered into by or on behalf of a public body are public records subject to inspection and copying by the public, provided that information exempt from disclosure under Section 7 of this Act may be redacted.

(Source: P.A. 96-542, eff. 1-1-10.)

for a period to be determined by the parties. If the requester and the public body agree to extend the period for compliance, a failure by the public body to comply with any previous deadlines shall not be treated as a denial of the request for the records.

(f) When additional time is required for any of the above reasons, the public body shall, within 5 business days after receipt of the request, notify the person making the request of the reasons for the extension and the date by which the response will be forthcoming. Failure to respond within the time permitted for extension shall be considered a denial of the request. A public body that fails to respond to a request within the time permitted for extension but thereafter provides the requester with copies of the requested public records may not impose a fee for those copies. A public body that requests an extension and subsequently fails to respond to the request may not treat the request as unduly burdensome under subsection (g).

(g) Requests calling for all records falling within a category shall be complied with unless compliance with the request would be unduly burdensome for the complying public body and there is no way to narrow the request and the burden on the public body outweighs the public interest in the information. Before invoking this exemption, the public body shall extend to the person making the request an opportunity to confer with it in an attempt to reduce the request to manageable proportions. If any body responds to a categorical request by stating that compliance would unduly burden its operation and the conditions described above are met, it shall do so in writing, specifying the reasons why it would be unduly burdensome and the extent to which compliance will so burden the operations of the public body. Such a response shall be treated as a denial of the request for information.

Repeated requests from the same person for the same records that are unchanged or identical to records previously provided or properly denied under this Act shall be deemed unduly burdensome under this provision.

(h) Each public body may promulgate rules and regulations in conformity with the provisions of this Section pertaining to the availability of records and procedures to be followed, including:

- (i) the times and places where such records will be made available, and
- (ii) the persons from whom such records may be obtained
- (iii) The time periods for compliance or denial of a request to inspect or copy records set out in this Section shall not apply to requests for records made for a commercial purpose. Such requests shall be subject to the provisions of Section 3.1 of this Act.

(Source: P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/3.1)

Section 3.1.

Requests for commercial purposes.

(a) A public body shall respond to a request for records to be used for a commercial purpose within 21 working days after receipt. The response shall (i) provide to the requester an estimate of the time required by the public body to provide the records requested and an estimate of the fees to be charged, which the public body may require the person to pay in full before copying the requested documents, (ii) deny the request pursuant to one or more of the exemptions set out in this Act, (iii) notify the requester that the request is unduly burdensome and extend an opportunity to the requester to attempt to reduce the request to manageable proportions, or (iv)

Freedom of Information officers, or their designees, shall receive requests submitted to the public body under this Act, ensure that the public body responds to requests in a timely fashion, and issue responses under this Act. Freedom of Information officers shall develop a list of documents or categories of records that the public body shall immediately disclose upon request.

Upon receiving a request for a public record, the Freedom of Information officer shall:

- (1) note the date the public body receives the written request;
- (2) compute the day on which the period for response will expire and make a notation of that date on the written request;
- (3) maintain an electronic or paper copy of a written request, including all documents submitted with the request until the request has been complied with or denied; and
- (4) create a file for the retention of the original request, a copy of the response, a record of written communications with the requester, and a copy of other communications.

(b) All Freedom of Information officers shall, within 6 months after the effective date of this amendatory Act of the 96th General Assembly, successfully complete an electronic training curriculum to be developed by the Public Access Counselor and thereafter successfully complete an annual training program. Thereafter, whenever a new Freedom of Information officer is designated by a public body, that person shall successfully complete the electronic training curriculum within 30 days after assuming the position. Successful completion of the required training curriculum within the periods provided shall be a prerequisite to continue serving as a Freedom of Information officer.

(Source: P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/4) (from Ch. 116, par. 204)

Section 4.

Each public body shall prominently display at each of its administrative or regional offices, make available for inspection and copying, and send through the mail if requested, each of the following:

(a) A brief description of itself, which will include, but not be limited to, a short summary of its purpose, a block diagram giving its functional subdivisions, the total amount of its operating budget, the number and location of all of its separate offices, the approximate number of full and part-time employees, and the identification and membership of any board, commission, committee, or council which operates in an advisory capacity relative to the operation of the public body, or which exercises control over its policies or procedures, or to which the public body is required to report and be answerable for its operations; and

(b) A brief description of the methods whereby the public may request information and public records, a directory designating the Freedom of Information officer or officers, the address where requests for public records should be directed, and any fees allowable under Section 6 of this Act. A public body that maintains a website shall also post this information on its website.

(Source: P.A. 96-542, eff. 1-1-10; 96-1000, eff. 7-2-10.)

(5 ILCS 140/5) (from Ch. 116, par. 205)

Section 5.

reduction, the public body may take into consideration the amount of materials requested and the cost of copying them.

(d) The imposition of a fee not consistent with subsections (6)(a) and (b) of this Act constitutes a denial of access to public records for the purposes of judicial review.

(e) The fee for each abstract of a driver's record shall be as provided in Section 6-118 of "The Illinois Vehicle Code", approved September 29, 1969, as amended, whether furnished as a paper copy or as an electronic copy.

(f) A public body may charge up to \$10 for each hour spent by personnel in searching for and retrieving a requested record. No fees shall be charged for the first 8 hours spent by personnel in searching for or retrieving a requested record. A public body may charge the actual cost of retrieving and transporting public records from an off-site storage facility when the public records are maintained by a third-party storage company under contract with the public body. If a public body imposes a fee pursuant to this subsection (f), it must provide the requester with an accounting of all fees, costs, and personnel hours in connection with the request for public records. The provisions of this subsection (f) apply only to commercial requests.

(Source: P.A. 96-542, eff. 1-1-10; 96-1000, eff. 7-2-10; 97-579, eff. 8-26-11.)

(5 ILCS 140/7) (from Ch. 116, par. 207)

Section 7.

Exemptions.

(1) When a request is made to inspect or copy a public record that contains information that is exempt from disclosure under this Section, but also contains information that is not exempt from disclosure, the public body may elect to redact the information that is exempt. The public body shall make the remaining information available for inspection and copying. Subject to this requirement, the following shall be exempt from inspection and copying:

(a) Information specifically prohibited from disclosure by federal or State law or rules and regulations implementing federal or State law.

(b) Private information, unless disclosure is required by another provision of this Act, a State or federal law or a court order.

(b-5) Files, documents, and other data or databases maintained by one or more law enforcement agencies and specifically designed to provide information to one or more law enforcement agencies regarding the physical or mental status of one or more individual subjects.

(c) Personal information contained within public records, the disclosure of which would constitute a clearly unwarranted invasion of personal privacy, unless the disclosure is consented to in writing by the individual subjects of the information. "Unwarranted invasion of personal privacy" means the disclosure of information that is highly personal or objectionable to a reasonable person and in which the subject's right to privacy outweighs any legitimate public interest in obtaining the information. The disclosure of information that bears on the public duties of public employees and officials shall not be considered an invasion of personal privacy.

(d) Records in the possession of any public body created in the course of administrative enforcement proceedings, and any law enforcement or correctional agency for law enforcement purposes, but only to the extent that disclosure would:

company within the investment portfolio of a private equity fund as a result of either investing or evaluating a potential investment of public funds in a private equity fund. The exemption contained in this item does not apply to the aggregate financial performance information of a private equity fund, nor to the identity of the fund's managers or general partners. The exemption contained in this item does not apply to the identity of a privately held company within the investment portfolio of a private equity fund, unless the disclosure of the identity of a privately held company may cause competitive harm. Nothing contained in this paragraph (g) shall be construed to prevent a person or business from consenting to disclosure.

(h) Proposals and bids for any contract, grant, or agreement, including information which if it were disclosed would frustrate procurement or give an advantage to any person proposing to enter into a contractor agreement with the body, until an award or final selection is made. Information prepared by or for the body in preparation of a bid solicitation shall be exempt until an award or final selection is made.

(i) Valuable formulae, computer geographic systems, designs, drawings and research data obtained or produced by any public body when disclosure could reasonably be expected to produce private gain or public loss. The exemption for "computer geographic systems" provided in this paragraph (i) does not extend to requests made by news media as defined in Section 2 of this Act when the requested information is not otherwise exempt and the only purpose of the request is to access and disseminate information regarding the health, safety, welfare, or legal rights of the general public.

(j) The following information pertaining to educational matters:

(i) test questions, scoring keys and other examination data used to administer an academic examination;

(ii) information received by a primary or secondary school, college, or university under its procedures for the evaluation of faculty members by their academic peers;

(iii) information concerning a school or university's adjudication of student disciplinary cases, but only to the extent that disclosure would unavoidably reveal the identity of the student; and

(iv) course materials or research materials used by faculty members.

(k) Architects' plans, engineers' technical submissions, and other construction related technical documents for projects not constructed or developed in whole or in part with public funds and the same for projects constructed or developed with public funds, including but not limited to power generating and distribution stations and other transmission and distribution facilities, water treatment facilities, airport facilities, sport stadiums, convention centers, and all government owned, operated, or occupied buildings, but only to the extent that disclosure would compromise security.

(l) Minutes of meetings of public bodies closed to the public as provided in the Open Meetings Act until the public body makes the minutes available to the public under Section 2.06 of the Open Meetings Act.

(m) Communications between a public body and an attorney or auditor representing the public body that would not be subject to discovery in litigation, and materials prepared or compiled by or for a public body in anticipation of a criminal, civil or administrative proceeding upon the request of an attorney advising the public body, and materials prepared or compiled with respect to internal audits of public bodies.

(n) Records relating to a public body's adjudication of employee grievances or disciplinary cases; however, this exemption shall not extend to the final outcome of cases in which discipline is imposed.

(z) Information about students exempted from disclosure under Sections 10-20.38 or 34-18.29 of the School Code, and information about undergraduate students enrolled at an institution of higher education exempted from disclosure under Section 25 of the Illinois Credit Card Marketing Act of 2009.

(aa) Information the disclosure of which is exempted under the Viatical Settlements Act of 2009.

(bb) Records and information provided to a mortality review team and records maintained by a mortality review team appointed under the Department of Juvenile Justice Mortality Review Team Act.

(cc) Information regarding interments, entombments, or inurnments of human remains that are submitted to the Cemetery Oversight Database under the Cemetery Care Act or the Cemetery Oversight Act, whichever is applicable.

(dd) Correspondence and records (i) that may not be disclosed under Section 11-9 of the Public Aid Code or (ii) that pertain to appeals under Section 11-8 of the Public Aid Code.

(ee) The names, addresses, or other personal information of persons who are minors and are also participants and registrants in programs of park districts, forest preserve districts, conservation districts, recreation agencies, and special recreation associations.

(ff) The names, addresses, or other personal information of participants and registrants in programs of park districts, forest preserve districts, conservation districts, recreation agencies, and special recreation associations where such programs are targeted primarily to minors.

(gg) Confidential information described in Section 1-100 of the Illinois Independent Tax Tribunal Act of 2012.

(hh) The report submitted to the State Board of Education by the School Security and Standards Task Force under item (8) of subsection (d) of Section 2-3.157 of the School Code and any information contained in that report.

(1.5) Any information exempt from disclosure under the Judicial Privacy Act shall be redacted from public records prior to disclosure under this Act.

(2) A public record that is not in the possession of a public body but is in the possession of a party with whom the agency has contracted to perform a governmental function on behalf of the public body, and that directly relates to the governmental function and is not otherwise exempt under this Act, shall be considered a public record of the public body, for purposes of this Act.

(3) This Section does not authorize withholding of information or limit the availability of records to the public, except as stated in this Section or otherwise provided in this Act.

(Source: P.A. 97-333, eff. 8-12-11; 97-385, eff. 8-15-11; 97-452, eff. 8-19-11; 97-783, eff. 7-13-12; 97-813, eff. 7-13-12; 97-847, eff. 9-22-12; 97-1065, eff. 8-24-12; 97-1129, eff. 8-28-12; 98-463, eff. 8-16-13; 98-578, eff. 8-27-13.)

(5 ILCS 140/7.1)

Section 7.1.

(Repealed).

(Source: P.A. 95-331, eff. 8-21-07. Repealed by P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/7.5)

(Text of Section from P.A. 98-49)

Section 7.5.

(q) Information prohibited from being disclosed by the Personnel Records Review Act.
(r) Information prohibited from being disclosed by the Illinois School Student Records Act.
(s) Information the disclosure of which is restricted under Section 5-108 of the Public Utilities Act.

(t) All identified or deidentified health information in the form of health data or medical records contained in, stored in, submitted to, transferred by, or released from the Illinois Health Information Exchange, and identified or deidentified health information in the form of health data and medical records of the Illinois Health Information Exchange in the possession of the Illinois Health Information Exchange Authority due to its administration of the Illinois Health Information Exchange. The terms "identified" and "deidentified" shall be given the same meaning as in the Health Insurance Accountability and Portability Act of 1996, Public Law 104-191, or any subsequent amendments thereto, and any regulations promulgated thereunder.

(u) Records and information provided to an independent team of experts under Brian's Law.

(v) Names and information of people who have applied for or received Firearm Owner's Identification Cards under the Firearm Owners Identification Card Act.

(w) Personally identifiable information which is exempted from disclosure under subsection (g) of Section 19.1 of the Toll Highway Act.

(x) Information which is exempted from disclosure under Section 5-1014.3 of the Counties Code or Section 8-11-21 of the Illinois Municipal Code.

(y) Confidential information under the Adult Protective Services Act and its predecessor enabling statute, the Elder Abuse and Neglect Act, including information about the identity and administrative finding against any caregiver of a verified and substantiated decision of significant abuse, neglect, or financial exploitation of an eligible adult maintained in the Department of Public Health's Health Care Worker Registry.

(z) Records and information provided to an at-risk adult fatality review team or the Illinois At-Risk Adult Fatality Review Team Advisory Council under Section 15 of the Adult Protective Services Act.

(Source: P.A. 97-80, eff. 7-5-11; 97-333, eff. 8-12-11; 97-342, eff. 8-12-11; 97-813, eff. 7-13-12; 97-976, eff. 1-1-13; 98-49, eff. 7-1-13.)

(Text of Section from P.A. 98-63)

Section 7.5.

Statutory Exemptions. To the extent provided for by the statutes referenced below, the following shall be exempt from inspection and copying:

(a) All information determined to be confidential under Section 4002 of the Technology Advancement and Development Act.

(b) Library circulation and order records identifying library users with specific materials under the Library Records Confidentiality Act.

(c) Applications, related documents, and medical records received by the Experimental Organ Transplantation Procedures Board and any and all documents or other records prepared by the Experimental Organ Transplantation Procedures Board or its staff relating to applications it has received.

(d) Information and records held by the Department of Public Health and its authorized representatives relating to known or suspected cases of sexually transmissible disease or any information the disclosure of which is restricted under the Illinois Sexually Transmissible

(v) Names and information of people who have applied for or received Firearm Owner's Identification Cards under the Firearm Owners Identification Card Act or applied for or received a concealed carry license under the Firearm Concealed Carry Act, unless otherwise authorized by the Firearm Concealed Carry Act; and databases under the Firearm Concealed Carry Act, records of the Concealed Carry Licensing Review Board under the Firearm Concealed Carry Act, and law enforcement agency objections under the Firearm Concealed Carry Act.

(w) Personally identifiable information which is exempted from disclosure under subsection (g) of Section 19.1 of the Toll Highway Act.

(x) Information which is exempted from disclosure under Section 5-1014.3 of the Counties Code or Section 8-11-21 of the Illinois Municipal Code.

(Source: P.A. 97-80, eff. 7-5-11; 97-333, eff. 8-12-11; 97-342, eff. 8-12-11; 97-813, eff. 7-13-12; 97-976, eff. 1-1-13; 98-63, eff. 7-9-13.)

(5 ILCS 140/8)

Section 8.

(Repealed).

(Source: P.A. 85-1357. Repealed by P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/9) (from Ch. 116, par. 209)

Section 9.

(a) Each public body denying a request for public records shall notify the requester in writing of the decision to deny the request, the reasons for the denial, including a detailed factual basis for the application of any exemption claimed, and the names and titles or positions of each person responsible for the denial. Each notice of denial by a public body shall also inform such person of the right to review by the Public Access Counselor and provide the address and phone number for the Public Access Counselor. Each notice of denial shall inform such person of his right to judicial review under Section 11 of this Act.

(b) When a request for public records is denied on the grounds that the records are exempt under Section 7 of this Act, the notice of denial shall specify the exemption claimed to authorize the denial and the specific reasons for the denial, including a detailed factual basis and a citation to supporting legal authority. Copies of all notices of denial shall be retained by each public body in a single central office file that is open to the public and indexed according to the type of exemption asserted and, to the extent feasible, according to the types of records requested.

(c) Any person making a request for public records shall be deemed to have exhausted his or her administrative remedies with respect to that request if the public body fails to act within the time periods provided in Section 3 of this Act.

(Source: P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/9.5)

Section 9.5.

Public Access Counselor; opinions.

(a) A person whose request to inspect or copy a public record is denied by a public body,

her discretion and choose to resolve a request for review by mediation or by a means other than the issuance of a binding opinion. The decision not to issue a binding opinion shall not be reviewable.

Upon receipt of a binding opinion concluding that a violation of this Act has occurred, the public body shall either take necessary action immediately to comply with the directive of the opinion or shall initiate administrative review under Section 11.5. If the opinion concludes that no violation of the Act has occurred, the requester may initiate administrative review under Section 11.5.

A public body that discloses records in accordance with an opinion of the Attorney General is immune from all liabilities by reason thereof and shall not be liable for penalties under this Act.

(g) If the requester files suit under Section 11 with respect to the same denial that is the subject of a pending request for review, the requester shall notify the Public Access Counselor, and the Public Access Counselor shall take no further action with respect to the request for review and shall so notify the public body.

(h) The Attorney General may also issue advisory opinions to public bodies regarding compliance with this Act. A review may be initiated upon receipt of a written request from the head of the public body or its attorney, which shall contain sufficient accurate facts from which a determination can be made. The Public Access Counselor may request additional information from the public body in order to assist in the review. A public body that relies in good faith on an advisory opinion of the Attorney General in responding to a request is not liable for penalties under this Act, so long as the facts upon which the opinion is based have been fully and fairly disclosed to the Public Access Counselor.

(Source: P.A. 96-542, eff. 1-1-10; 97-579, eff. 8-26-11.)

(5 ILCS 140/10)

Section 10.

(Repealed).

(Source: P.A. 83-1013. Repealed by P.A. 96-542, eff. 1-1-10.)

(5 ILCS 140/11) (from Ch. 116, par. 211)

Section 11.

(a) Any person denied access to inspect or copy any public record by a public body may file suit for injunctive or declaratory relief.

(b) Where the denial is from a public body of the State, suit may be filed in the circuit court for the county where the public body has its principal office or where the person denied access resides.

(c) Where the denial is from a municipality or other public body, except as provided in subsection (b) of this Section, suit may be filed in the circuit court for the county where the public body is located.

(d) The circuit court shall have the jurisdiction to enjoin the public body from withholding public records and to order the production of any public records improperly withheld from the person seeking access. If the public body can show that exceptional circumstances exist, and that the body is exercising due diligence in responding to the request, the court may retain jurisdiction and allow the agency additional time to complete its review of the records.

Appendix C ***Library Bill of Rights***

Adopted June 19, 1939, by the ALA Council; amended October 14, 1944; June 18, 1948; February 2, 1961; June 27, 1967; January 23, 1980; inclusion of "age" reaffirmed January 23, 1996.

The American Library Association affirms that all libraries are forums for information and ideas, and that the following basic policies should guide their services.

I. Books and other library resources should be provided for the interest, information, and enlightenment of all people of the community the library serves. Materials should not be excluded because of the origin, background, or views of those contributing to their creation.

II. Libraries should provide materials and information presenting all points of view on current and historical issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval.

III. Libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment.

IV. Libraries should cooperate with all persons and groups concerned with resisting abridgment of free expression and free access to ideas.

V. A person's right to use a library should not be denied or abridged because of origin, age, background, or views.

VI. Libraries that make exhibit spaces and meeting rooms available to the public they serve should make such facilities available on an equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use.

A history of the Library Bill of Rights is found in the latest edition of the [Intellectual Freedom Manual](#).

In some cases, commercial content ratings, such as the [Motion Picture Association of America](#) (MPAA) movie ratings, might appear on the packaging or promotional materials provided by producers or distributors. However, marking out or removing this information from materials or packaging constitutes expurgation or censorship.

MPAA movie ratings, [Entertainment Software Rating Board](#) (ESRB) game ratings, and other rating services are private advisory codes and have no legal standing ([Expurgation of Library Materials](#)). For the library to add ratings to nonprint materials if they are not already there is unacceptable. It is also unacceptable to post a list of such ratings with a collection or to use them in circulation policies or other procedures. These uses constitute labeling, "an attempt to prejudice attitudes" ([Labels and Rating Systems](#)), and are forms of censorship. The application of locally generated ratings schemes intended to provide content warnings to library users is also inconsistent with the Library Bill of Rights.

The interests of young people, like those of adults, are not limited by subject, theme, or level of sophistication. Librarians have a responsibility to ensure young people's access to materials and services that reflect diversity of content and format sufficient to meet their needs.

("Free Access to Libraries for Minors"; "Access to Resources and Services in the School Library Media Program"; "Access for Children and Young Adults to Nonprint Materials"; and "Minors and Internet Interactivity").²

Libraries should use technology to enhance, not deny, digital access. Users have the right to be free of unreasonable limitations or conditions set by libraries, librarians, system administrators, vendors, network service providers, or others. Contracts, agreements, and licenses entered into by libraries on behalf of their users should not violate this right. Libraries should provide library users the training and assistance necessary to find, evaluate, and use information effectively.

Users have both the right of confidentiality and the right of privacy. The library should uphold these rights by policy, procedure, and practice in accordance with "Privacy: An Interpretation of the Library Bill of Rights," and "Importance of Education to Intellectual Freedom: An Interpretation of the Library Bill of Rights."

Equity of Access

The digital environment provides expanding opportunities for everyone to participate in the information society, but individuals may face serious barriers to access.

Digital information, services, and networks provided directly or indirectly by the library should be equally, readily, and equitably accessible to all library users. American Library Association policies oppose the charging of user fees for the provision of information services by libraries that receive support from public funds (50.3 "Free Access to Information"; 53.1.14 "Economic Barriers to Information Access"; 60.1.1 "Minority Concerns Policy Objectives"; 61.1 "Library Services for the Poor Policy Objectives"). All libraries should develop policies concerning access to digital information that are consistent with ALA's policies and guidelines, including "Economic Barriers to Information Access: An Interpretation of the Library Bill of Rights," "Guidelines for the Development and Implementation of Policies, Regulations and Procedures Affecting Access to Library Materials, Services and Facilities," and "Services to Persons with Disabilities: An Interpretation of the Library Bill of Rights."

Information Resources and Access

Libraries, acting within their mission and objectives, must support access to information on all subjects that serve the needs or interests of each user, regardless of the user's age or the content of the material. In order to preserve the cultural record and to prevent the loss of information, libraries may need to expand their selection or collection development policies to ensure preservation, in appropriate formats, of information obtained digitally. Libraries have an obligation to provide access to government information available in digital format.

Providing connections to global information, services, and networks is not the same as selecting and purchasing materials for a library collection. Libraries and librarians should not deny or limit access to digital information because of its allegedly controversial content or because of a librarian's personal beliefs or fear of confrontation. Furthermore, libraries and librarians should not deny access to digital information solely on the grounds that it is perceived to lack value. Parents and legal guardians who are concerned about their children's use of digital resources should provide guidance to their own children. Some information accessed digitally

Appendix F ***Access to Library Resources and Services Regardless of Sex, Gender Identity, Gender Expression, or Sexual Orientation***

Adopted June 30, 1993, by the ALA Council; amended July 12, 2000, June 30, 2004, July 2, 2008.

An Interpretation of the Library Bill of Rights

American libraries exist and function within the context of a body of laws derived from the United States Constitution and the [First Amendment](#). The [Library Bill of Rights](#) embodies the basic policies that guide libraries in the provision of services, materials, and programs.

In the preamble to its Library Bill of Rights, the American Library Association affirms that *all* [emphasis added] libraries are forums for information and ideas. This concept of *forum* and its accompanying principle of *inclusiveness* pervade all six Articles of the *Library Bill of Rights*.

The American Library Association stringently and unequivocally maintains that libraries and librarians have an obligation to resist efforts that systematically exclude materials dealing with any subject matter, including sex, gender identity, gender expression, or sexual orientation:

- Article I of the *Library Bill of Rights* states that "Materials should not be excluded because of the origin, background, or views of those contributing to their creation." The Association affirms that books and other materials coming from gay, lesbian, bisexual, and/or transgendered presses, gay, lesbian, bisexual and/or transgendered authors or other creators, and materials regardless of format or services dealing with gay, lesbian, bisexual and/or transgendered life are protected by the *Library Bill of Rights*. Librarians are obligated by the *Library Bill of Rights* to endeavor to select materials without regard to the sex, gender identity, or sexual orientation of their creators by using the criteria identified in their written, approved selection policies ([ALA policy 53.1.5](#)).
- Article II maintains that "Libraries should provide materials and information presenting all points of view on current and historical issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval." Library services, materials, and programs representing diverse points of view on sex, gender identity, gender expression, or sexual orientation should be considered for purchase and inclusion in library collections and programs. (ALA policies [53.1.1](#), [53.1.9](#), and [53.1.11](#)). The Association affirms that attempts to proscribe or remove materials dealing with gay, lesbian, bisexual, and/or transgendered life without regard to the written, approved selection policy violate this tenet and constitute censorship.
- Articles III and IV mandate that libraries "challenge censorship" and cooperate with those "resisting abridgement of free expression and free access to ideas."
- Article V holds that "A person's right to use a library should not be denied or abridged because of origin, age, background or views." In the *Library Bill of Rights* and all its Interpretations, it is intended that: "origin" encompasses all the characteristics of individuals that are inherent in the circumstances of their birth; "age" encompasses all the characteristics of individuals that are inherent in their levels of development and maturity; "background" encompasses all the characteristics of individuals that are a result

An Interpretation of the Library Bill of Rights

Libraries: An American Value states, “We protect the rights of individuals to express their opinions about library resources and services.” The American Library Association declares as a matter of firm principle that it is the responsibility of every library to have a clearly defined written policy for collection development that includes a procedure for review of challenged materials. Selection of online resources, including Web sites, should also be governed by this collection development policy and be subject to the same procedures for review of challenged materials. This policy reflects the *Library Bill of Rights* and is approved by the appropriate governing authority.

Challenged materials should remain in the collection during the review process. The *Library Bill of Rights* states in Article I that “Materials should not be excluded because of the origin, background, or views of those contributing to their creation,” and in Article II, that “Materials should not be proscribed or removed because of partisan or doctrinal disapproval.” Freedom of expression is protected by the Constitution of the United States, but constitutionally protected expression is often separated from unprotected expression only by a dim and uncertain line. The Supreme Court has held that the Constitution requires a procedure designed to examine critically all challenged expression before it can be suppressed.¹ A hearing is a part of this procedure. Materials that meet the criteria for selection and inclusion within the collection should not be removed.

Therefore, any attempt, be it legal or extra-legal,* to regulate or suppress materials in libraries must be closely scrutinized to the end that protected expression is not abridged.

Adopted June 25, 1971; amended July 1, 1981; amended January 10, 1990;
January 28, 2009, by the ALA Council.

* “Extra-legal” refers to actions that are not regulated or sanctioned by law. These can include attempts to remove or suppress materials by library staff and library board members that circumvent the library’s collection development policy, or actions taken by elected officials or library board members outside the established legal process for making legislative or board decisions. “Legal process” includes challenges to library materials initiated and conducted pursuant to the library’s collection development policy, actions taken by legislative bodies or library boards during official sessions or meetings, or litigation undertaken in courts of law with jurisdiction over the library and the library’s governing body.

¹ *Bantam Books, Inc. v. Sullivan*, 372 U.S. 58 (1963)

Intellectual freedom, the essence of equitable library services, provides for free access to all expressions of ideas through which any and all sides of a question, cause, or movement may be explored. Toleration is meaningless without tolerance for what some may consider detestable. Librarians must not permit their own preferences to limit their degree of tolerance in collection development.

The freedom to read is guaranteed by the Constitution. Those with faith in free people will stand firm on these constitutional guarantees of essential rights and will exercise the responsibilities that accompany these rights.

We therefore affirm these propositions:

1. *It is in the public interest for publishers and librarians to make available the widest diversity of views and expressions, including those that are unorthodox, unpopular, or considered dangerous by the majority.*

Creative thought is by definition new, and what is new is different. The bearer of every new thought is a rebel until that idea is refined and tested. Totalitarian systems attempt to maintain themselves in power by the ruthless suppression of any concept that challenges the established orthodoxy. The power of a democratic system to adapt to change is vastly strengthened by the freedom of its citizens to choose widely from among conflicting opinions offered freely to them. To stifle every nonconformist idea at birth would mark the end of the democratic process. Furthermore, only through the constant activity of weighing and selecting can the democratic mind attain the strength demanded by times like these. We need to know not only what we believe but why we believe it.

2. *Publishers, librarians, and booksellers do not need to endorse every idea or presentation they make available. It would conflict with the public interest for them to establish their own political, moral, or aesthetic views as a standard for determining what should be published or circulated.*

Publishers and librarians serve the educational process by helping to make available knowledge and ideas required for the growth of the mind and the increase of learning. They do not foster education by imposing as mentors the patterns of their own thought. The people should have the freedom to read and consider a broader range of ideas than those that may be held by any single librarian or publisher or government or church. It is wrong that what one can read should be confined to what another thinks proper.

3. *It is contrary to the public interest for publishers or librarians to bar access to writings on the basis of the personal history or political affiliations of the author.*

No art or literature can flourish if it is to be measured by the political views or private lives of its creators. No society of free people can flourish that draws up lists of writers to whom it will not listen, whatever they may have to say.

4. *There is no place in our society for efforts to coerce the taste of others, to confine adults to the reading matter deemed suitable for adolescents, or to inhibit the efforts of writers to achieve artistic expression.*

To some, much of modern expression is shocking. But is not much of life itself shocking? We cut off literature at the source if we prevent writers from dealing with the stuff of life. Parents and teachers have a responsibility to prepare the young to meet the diversity of

application of these propositions may mean the dissemination of ideas and manners of expression that are repugnant to many persons. We do not state these propositions in the comfortable belief that what people read is unimportant. We believe rather that what people read is deeply important; that ideas can be dangerous; but that the suppression of ideas is fatal to a democratic society. Freedom itself is a dangerous way of life, but it is ours.

Publishers, industry groups, and distributors sometimes add ratings to material or include them as part of their packaging. Librarians should not endorse such practices. However, removing or destroying such ratings—if placed there by, or with permission of, the copyright holder—could constitute expurgation (see *Expurgation of Library Materials: An Interpretation of the Library Bill of Rights*).

Some find it easy and even proper, according to their ethics, to establish criteria for judging materials as objectionable. However, injustice and ignorance, rather than justice and enlightenment, result from such practices. The American Library Association opposes any efforts that result in closing any path to knowledge.