Orion Township Public Library Board of Trustees
Meeting Agenda
Thursday, February 17, 2022
6:30 p.m.

Library Mission: To serve and engage a thriving community of lifelong learners

I. Call to order
II. Approval of agenda
III. Consent agenda
   A. Minutes of 1/27/2021 Regular Library Board meeting
   B. Bills from January 2022
IV. Financial Statement and Treasurer’s Report as of January 31, 2022
V. Public Comment
VI. Communications
   A. Press coverage
VII. Director’s Report
   A. Library news and activities
   B. Usage reports
   C. Advocacy news
      a. potential changes to Open Meetings Act - HB5689
      b. MLA Advocacy Hour – Understanding Headlee
VIII. Old Business
IX. Standing Committee Reports
   A. Policy
   B. Finance – adding Chase to PNC accounts and credit card
   C. Fund Development/Strategic Planning
   D. Board Development – Article from EveryLibrary Reading Between the Lines
   E. Building – report from Feb. 17 meeting: gas lines
   F. Human Resources
X. Discussion Items
   A. Public Library Financial Management Guide
   B. Financial Specialist position
   C. Community Relations Specialist position
XI. Action Items
   A. Approve adding Chase to all PNC accounts
XII. Public Comment
XIII. Trustee Comments
XIV. Adjournment
Minutes of the
Orion Township Public Library Board of Trustees
Thursday, January 27, 2022
6:30 p.m.

Library Mission: To serve and engage a thriving community of lifelong learners

I. Call to order - 6:35 p.m. Present: Thorndycraft, Pergeau, Abramczyk, Luna, and Quinn. Excused: Phillips

II. Approval of agenda – Changes to the agenda: Add Action Item B- Policy and add Discussion item H- Director Open House. Motion by Abramczyk, second by Pergeau to approve the agenda as changed. Passed 4 to 0.

III. Consent agenda- Motion by Abramczyk, second by Luna to approve the agenda. Passed 4 to 0.
   A. Minutes of 12/16/2021 Regular Library Board meeting
   B. Bills from December 2021

IV. Financial Statement and Treasurer’s Report as of December 31, 2021. Reviewed statements and discussed various expense and revenues. Audit will be in April rather than February.

V. Public Comment - None

VI. Communications
   A. Press coverage- The director reviewed the various articles found in the Lake Orion Review. He mentioned that the Chamber of Commerce ran an article about him becoming the new director. Facebook posts remain popular. Only one comment card was received this month and the director responded.

VII. Director’s Report
   A. Library news and activities- Masks are still recommended but not required. -Friends cancelled the book sale for this month. -Home delivery is proving popular. Grab and go still on-going. Social Media Committee will pick-up Facebook posts. -There are three openings needing to be filled. -Wando software is expiring, looking to replace with a similar service to track the books for pre-school children. -New lockers should be operational soon. -The new app seems to be fully functional and ready to go. Would like to know what security measures are in place. – new outreach librarian started this month.
   B. Usage reports – numbers are up for the month compared to December 2020. Total circulation for the year is up as well.
   C. Advocacy news- None

VIII. Old Business - None

IX. Standing Committee Reports
   A. Policy – minutes from Jan. 12 meeting: CUS-2, MGT-7, Loan Renew and Hold Schedule, -Reviewed minutes. Committee reviewed policies regarding patron conduct (CUS-2) specifically photographing, filming, and recording in public. Also reviewed Reconsideration of Library Material Policy (MGT-7) and Loan Renewal and Hold Schedules. Changes are being recommended as action items.
   B. Finance - None
   C. Fund Development/Strategic Planning – Strategic Planning committee is recommending carrying over the current plan to 2022. A new plan will need to be developed, for the plan is usually updated yearly.
   D. Board Development – Monthly on-line meetings (by MLA) regarding important issues.
   E. Building – Need to set up meeting. Director to have secretary set up the date and time convenient to committee members.
   F. Human Resources - None
X. Discussion Items
   A. Review Patron-NonResident fee from Fines & Fees Policy – Annual review of this fee. The fee remains the same at $200.00.
   B. Record retention policy report to board by director – Most department are on track for record retention. However, admin is behind due to current transition of staff.
   C. Uptick in First Amendment Audits – Nice article included in packet.
   D. Review list of bank institutions- Annual requirement to review and approve. Director to look at possible changes in staff signers when a new finance person is hired. Next month on the agenda; add action item- Director to be authorized signer on all PNC accounts.
   E. Quarantine & Isolation – Library continues to follow Oakland County guidelines. Some staff do not wear masks (fully vaccinated), but most do. Patrons must also follow current guidelines and policy. The library strongly recommends the wearing of masks for all.
   F. Be Smart, gun safety – Received a request from an individual to post a flyer regarding gun safety. The director brought this to the boards attention because it appears to be a political issue in light of the school shooting at Oxford High School. The director did not post the flyer.
   G. Project Orion- Not held for the last two years. Discussed consideration to renew the project. Director will proceed again.
   H. Director Open House (added item). The President and Vice President will work on this event.

XI. Action Items
   A. List of bank institutions- motion by Abramczyk, second by Luna to approve bank institutions. Approved 4 to 0.
   B. Policy (added item)- Committee moves to change policies as delineated in the committee minutes of the January 12, 2022 meeting. Approved 4 to 0.

XII. Public Comment - None

XIII. Trustee Comments

XIV. Adjournment - 8:11 p.m.
BILLS - JANUARY 1, 2022 TO JANUARY 31, 2022

SALARIES-EXEMPT  $  67,674.29

SALARIES-NON-EXEMPT  $  66,128.40

SOCIAL SECURITY
12/01/2021 - 12/31/2021  $  9,862.98

OPT-OUT BENEFIT
Non-covered employee ins. reimb  $  600.00

Total bills per Solomon reports attached:
Account Distribution Report

TOTAL BILLS TO DATE  $  144,265.67
## Check Register - Standard

**Period:** 01-22  **As of:** 2/10/2022

<table>
<thead>
<tr>
<th>Check Nbr</th>
<th>Check Type</th>
<th>Check Date</th>
<th>Vendor ID</th>
<th>Vendor Name</th>
<th>Period To Post</th>
<th>Ref Nbr</th>
<th>Doc Type</th>
<th>Invoice Number</th>
<th>Invoice Date</th>
<th>Discount Taken</th>
<th>Amount Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>002264</td>
<td>EP</td>
<td>1/30/2022</td>
<td>1117</td>
<td>0</td>
<td>01-22</td>
<td>034033</td>
<td>VO</td>
<td>6897116319</td>
<td>1/10/2022</td>
<td>0.00</td>
<td>73.35</td>
</tr>
<tr>
<td>002265</td>
<td>EP</td>
<td>1/28/2022</td>
<td></td>
<td>0</td>
<td>01-22</td>
<td>01-22</td>
<td>034034</td>
<td>VO STATEMENT</td>
<td>1/6/2022</td>
<td>0.00</td>
<td>2,707.43</td>
</tr>
<tr>
<td>002266</td>
<td>EP</td>
<td>1/3/2022</td>
<td></td>
<td>0</td>
<td>01-22</td>
<td>01-22</td>
<td>034035</td>
<td>VO 204744776742</td>
<td>12/8/2021</td>
<td>0.00</td>
<td>1,996.78</td>
</tr>
<tr>
<td>002267</td>
<td>EP</td>
<td>1/5/2022</td>
<td></td>
<td>0</td>
<td>01-22</td>
<td>01-22</td>
<td>034036</td>
<td>VO JOS1-000825-000</td>
<td>11/30/2021</td>
<td>0.00</td>
<td>7.22</td>
</tr>
<tr>
<td>002268</td>
<td>EP</td>
<td>1/21/2022</td>
<td></td>
<td>0</td>
<td>01-22</td>
<td>01-22</td>
<td>034037</td>
<td>VO 596643661</td>
<td>1/14/2022</td>
<td>0.00</td>
<td>127.10</td>
</tr>
<tr>
<td>002269</td>
<td>EP</td>
<td>1/1/2022</td>
<td></td>
<td>0</td>
<td>01-22</td>
<td>01-22</td>
<td>034038</td>
<td>VO 596643485</td>
<td>1/14/2022</td>
<td>0.00</td>
<td>228.40</td>
</tr>
<tr>
<td>002270</td>
<td>EP</td>
<td>1/16/2022</td>
<td></td>
<td>0</td>
<td>01-22</td>
<td>01-22</td>
<td>034039</td>
<td>VO VF3524-0001</td>
<td>1/18/2022</td>
<td>0.00</td>
<td>4,084.12</td>
</tr>
<tr>
<td>002271</td>
<td>EP</td>
<td>1/18/2022</td>
<td></td>
<td>0</td>
<td>01-22</td>
<td>01-22</td>
<td>034040</td>
<td>VO 30077190</td>
<td>1/18/2022</td>
<td>0.00</td>
<td>7,126.31</td>
</tr>
</tbody>
</table>

**Check Count:** 8

<table>
<thead>
<tr>
<th>Check Type</th>
<th>Count</th>
<th>Amount Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td>Hand</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td>Electronic Payment</td>
<td>8</td>
<td>17,250.71</td>
</tr>
<tr>
<td>Void</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td>Stub</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td>Zero</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td>Mask</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td>Total</td>
<td>8</td>
<td>17,250.71</td>
</tr>
</tbody>
</table>

**Company Disc Total:** 0.00  | **Company Total:** 17,250.71
<table>
<thead>
<tr>
<th>Acct</th>
<th>Vendor</th>
<th>Tran Desc</th>
<th>Tran Type</th>
<th>Period Post</th>
<th>Ref Nbr</th>
<th>Tran Date</th>
<th>ExRef Nbr</th>
<th>Debit Amount</th>
<th>Credit Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>4071</td>
<td>FRIENDS</td>
<td>Donation Expense</td>
<td>VO</td>
<td>01-22</td>
<td>033937</td>
<td>1/6/2022</td>
<td>484</td>
<td>150.00</td>
<td>0.00</td>
</tr>
<tr>
<td>4071</td>
<td>SIGNING</td>
<td>SIGNING BASICS FF 1625</td>
<td>VO</td>
<td>01-22</td>
<td>034012</td>
<td>1/27/2022</td>
<td>FRIENDS FUNDING</td>
<td>75.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Account Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>225.00</td>
<td>0.00</td>
</tr>
<tr>
<td>5083</td>
<td>Medical Insurance</td>
<td></td>
<td>VO</td>
<td>01-22</td>
<td>033934</td>
<td>1/6/2022</td>
<td>165075503</td>
<td>132.78</td>
<td>0.00</td>
</tr>
<tr>
<td>5083</td>
<td>AMERITAS</td>
<td>AMERITAS LIFE INSURANCE CORP</td>
<td>VO</td>
<td>01-22</td>
<td>033932</td>
<td>1/6/2022</td>
<td>STATEMENT</td>
<td>832.96</td>
<td>0.00</td>
</tr>
<tr>
<td>5083</td>
<td>MML BC/BE</td>
<td>BLUE CROSS BLUE SHIELD OF MICH</td>
<td>VO</td>
<td>01-22</td>
<td>033974</td>
<td>1/13/2022</td>
<td>220070084501</td>
<td>3,283.24</td>
<td>0.00</td>
</tr>
<tr>
<td>5083</td>
<td>BCN</td>
<td>BLUE CARE NETWORK</td>
<td>VO</td>
<td>01-22</td>
<td>033979</td>
<td>1/13/2022</td>
<td>220070084501</td>
<td>7,499.85</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Account Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11,748.63</td>
<td>0.00</td>
</tr>
<tr>
<td>5084</td>
<td>Life Insurance</td>
<td></td>
<td>VO</td>
<td>01-22</td>
<td>034000</td>
<td>1/20/2022</td>
<td>STATEMENT</td>
<td>145.12</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Account Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>145.12</td>
<td>0.00</td>
</tr>
<tr>
<td>5085</td>
<td>Disability Insurance</td>
<td></td>
<td>VO</td>
<td>01-22</td>
<td>034000</td>
<td>1/20/2022</td>
<td>STATEMENT</td>
<td>722.88</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Account Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>722.88</td>
<td>0.00</td>
</tr>
<tr>
<td>5086</td>
<td>Pension Expense</td>
<td></td>
<td>VO</td>
<td>01-22</td>
<td>034040</td>
<td>2/8/2022</td>
<td>30077190</td>
<td>5,936.72</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Account Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5,936.72</td>
<td>0.00</td>
</tr>
<tr>
<td>6901</td>
<td>Staff Copier/ Printer Supplies</td>
<td></td>
<td>VO</td>
<td>01-22</td>
<td>033698</td>
<td>1/20/2022</td>
<td>30884203</td>
<td>323.33</td>
<td>0.00</td>
</tr>
<tr>
<td>6901</td>
<td>GREAT AMI</td>
<td>GREATAMERICA FINANCIAL SVCS</td>
<td>VO</td>
<td>01-22</td>
<td>034005</td>
<td>1/27/2022</td>
<td>30925918</td>
<td>96.44</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Account Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>419.77</td>
<td>0.00</td>
</tr>
<tr>
<td>6911</td>
<td>Automation Expenses</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Orion Twp. Public Library
Account Distribution - Standard
Period: 01-22 As of: 2/10/2022
Report: 03690.rpt
Company: OTPL
<table>
<thead>
<tr>
<th>Acct</th>
<th>Vendor</th>
<th>Tran Desc</th>
<th>Tran Type</th>
<th>Period Post</th>
<th>Ref Nbr</th>
<th>Tran Date</th>
<th>ExtRef Nbr</th>
<th>Debit Amount</th>
<th>Credit Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>6911</td>
<td>KNIGHT TE</td>
<td>KNIGHT TECHNOLOGY GROUP, INC</td>
<td>VO</td>
<td>01-22</td>
<td>033936</td>
<td>1/6/2022</td>
<td>18628</td>
<td>90.00</td>
<td>0.00</td>
</tr>
<tr>
<td>6911</td>
<td>OCLC, INC</td>
<td>OCLC, INC.</td>
<td>VO</td>
<td>01-22</td>
<td>033980</td>
<td>1/13/2022</td>
<td>1000166819</td>
<td>670.08</td>
<td>0.00</td>
</tr>
<tr>
<td>6911</td>
<td>TLN</td>
<td>THE LIBRARY NETWORK</td>
<td>VO</td>
<td>01-22</td>
<td>033884</td>
<td>1/13/2022</td>
<td>69447</td>
<td>2,405.91</td>
<td>0.00</td>
</tr>
<tr>
<td>6911</td>
<td>UNIQUE M</td>
<td>UNIQUE MANAGEMENT SERVICES, IN</td>
<td>VO</td>
<td>01-22</td>
<td>033985</td>
<td>1/13/2022</td>
<td>609677</td>
<td>50.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Account Total</td>
<td>3,215.99</td>
<td>0.00</td>
</tr>
<tr>
<td>6923</td>
<td></td>
<td>Periodicals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6923</td>
<td>LO REVIEW</td>
<td>THE LAKE CRION REVIEW</td>
<td>VO</td>
<td>01-22</td>
<td>034013</td>
<td>1/27/2022</td>
<td>LOR1-26-22</td>
<td>120.00</td>
<td>0.00</td>
</tr>
<tr>
<td>6923</td>
<td>WT.COX</td>
<td>WT.COX INFORMATION SERVICES</td>
<td>VO</td>
<td>01-22</td>
<td>034016</td>
<td>1/27/2022</td>
<td>2085696</td>
<td>296.14</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Account Total</td>
<td>416.14</td>
<td>0.00</td>
</tr>
<tr>
<td>6924</td>
<td></td>
<td>Audio Visual</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6924</td>
<td>MIDWEST T</td>
<td>MIDWEST TAPE</td>
<td>VO</td>
<td>01-22</td>
<td>034009</td>
<td>1/27/2022</td>
<td>501509174</td>
<td>39.99</td>
<td>0.00</td>
</tr>
<tr>
<td>6924</td>
<td>MIDWEST T</td>
<td>MIDWEST TAPE</td>
<td>VO</td>
<td>01-22</td>
<td>034011</td>
<td>1/27/2022</td>
<td>501569521</td>
<td>59.99</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Account Total</td>
<td>99.98</td>
<td>0.00</td>
</tr>
<tr>
<td>6924</td>
<td></td>
<td>Audio Visual</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6924</td>
<td>MIDWEST T</td>
<td>MIDWEST TAPE</td>
<td>VO</td>
<td>01-22</td>
<td>034008</td>
<td>1/27/2022</td>
<td>501509173</td>
<td>29.24</td>
<td>0.00</td>
</tr>
<tr>
<td>6924</td>
<td>MIDWEST T</td>
<td>MIDWEST TAPE</td>
<td>VO</td>
<td>01-22</td>
<td>034010</td>
<td>1/27/2022</td>
<td>501540375</td>
<td>11.24</td>
<td>0.00</td>
</tr>
<tr>
<td>6924</td>
<td>TLN</td>
<td>THE LIBRARY NETWORK</td>
<td>VO</td>
<td>01-22</td>
<td>034015</td>
<td>1/27/2022</td>
<td>69658</td>
<td>43.95</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Account Total</td>
<td>84.43</td>
<td>0.00</td>
</tr>
<tr>
<td>6927</td>
<td></td>
<td>Computerized Reference</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6927</td>
<td>CREATIVEE</td>
<td>JOANN STORES, LLC</td>
<td>VO</td>
<td>01-22</td>
<td>033975</td>
<td>1/13/2022</td>
<td>DMARVA22-744</td>
<td>1,050.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Account Total</td>
<td>1,050.00</td>
<td>0.00</td>
</tr>
<tr>
<td>6928</td>
<td></td>
<td>Dvd-Adult</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6928</td>
<td>MIDWEST T</td>
<td>MIDWEST TAPE</td>
<td>VO</td>
<td>01-22</td>
<td>034007</td>
<td>1/27/2022</td>
<td>501509172</td>
<td>18.74</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Account Total</td>
<td>18.74</td>
<td>0.00</td>
</tr>
<tr>
<td>6930</td>
<td></td>
<td>Operating Supplies &amp; Expense</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Acct</td>
<td>Vendor</td>
<td>Tran Desc</td>
<td>Tran Type</td>
<td>Period</td>
<td>Ref Nbr</td>
<td>Tran Date</td>
<td>ExRef Nbr</td>
<td>Debit Amount</td>
<td>Credit Amount</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
<td>------------------------------</td>
<td>-----------</td>
<td>--------</td>
<td>---------</td>
<td>-----------</td>
<td>-----------</td>
<td>--------------</td>
<td>---------------</td>
</tr>
<tr>
<td>6930</td>
<td>ADP</td>
<td>AUTOMATIC DATA PROCESSING</td>
<td>VO</td>
<td>01-22</td>
<td>034037</td>
<td>2/8/2022</td>
<td>596643661</td>
<td>127.10</td>
<td>0.00</td>
</tr>
<tr>
<td>6930</td>
<td>ADP</td>
<td>AUTOMATIC DATA PROCESSING</td>
<td>VO</td>
<td>01-22</td>
<td>034038</td>
<td>2/8/2022</td>
<td>596643485</td>
<td>228.40</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Account Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>355.50</td>
<td>0.00</td>
</tr>
<tr>
<td>7100</td>
<td></td>
<td><strong>Telephone</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7100</td>
<td>TELNET WK</td>
<td>TELNET WORLDWIDE</td>
<td>VO</td>
<td>01-22</td>
<td>033983</td>
<td>1/13/2022</td>
<td>237951</td>
<td>145.80</td>
<td>0.00</td>
</tr>
<tr>
<td>7100</td>
<td>VERIZON</td>
<td>VERIZON WIRELESS</td>
<td>VO</td>
<td>01-22</td>
<td>034033</td>
<td>2/8/2022</td>
<td>9897116319</td>
<td>47.40</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Account Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>193.20</td>
<td>0.00</td>
</tr>
<tr>
<td>7101</td>
<td></td>
<td><strong>Utilities-Gas</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7101</td>
<td>CONS/PWA</td>
<td>CONSUMERS ENERGY</td>
<td>VO</td>
<td>01-22</td>
<td>034035</td>
<td>2/8/2022</td>
<td>204744776742</td>
<td>1,996.78</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Account Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,996.78</td>
<td>0.00</td>
</tr>
<tr>
<td>7102</td>
<td></td>
<td><strong>Utilities-Electricity</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7102</td>
<td>DTE</td>
<td>DTE ENERGY</td>
<td>VO</td>
<td>01-22</td>
<td>034034</td>
<td>2/8/2022</td>
<td>STATEMENT</td>
<td>2,707.43</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Account Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2,707.43</td>
<td>0.00</td>
</tr>
<tr>
<td>7103</td>
<td></td>
<td><strong>Water</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7103</td>
<td>ORION DPL</td>
<td>CHARTER TOWNSHIP OF ORION</td>
<td>VO</td>
<td>01-22</td>
<td>034036</td>
<td>2/8/2022</td>
<td>JOS1-000825-000</td>
<td>7.22</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Account Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7.22</td>
<td>0.00</td>
</tr>
<tr>
<td>7110</td>
<td></td>
<td><strong>Repairs &amp; Maintenance-Building</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7110</td>
<td>GFL</td>
<td>GREEN FOR LIFE ENVIRONMENTAL</td>
<td>VO</td>
<td>01-22</td>
<td>033977</td>
<td>1/13/2022</td>
<td>0053360791</td>
<td>52.20</td>
<td>0.00</td>
</tr>
<tr>
<td>7110</td>
<td>SUPPLY</td>
<td>SUPPLY DEV</td>
<td>VO</td>
<td>01-22</td>
<td>033981</td>
<td>1/13/2022</td>
<td>473377-00</td>
<td>26.26</td>
<td>0.00</td>
</tr>
<tr>
<td>7110</td>
<td>SUPPLY</td>
<td>SUPPLY DEV</td>
<td>VO</td>
<td>01-22</td>
<td>033982</td>
<td>1/13/2022</td>
<td>473374-00</td>
<td>300.24</td>
<td>0.00</td>
</tr>
<tr>
<td>7110</td>
<td>DEPENDAE</td>
<td>DEPENDABLE SEPTIC TANK CNRS</td>
<td>VO</td>
<td>01-22</td>
<td>033997</td>
<td>1/20/2022</td>
<td>13137</td>
<td>495.00</td>
<td>0.00</td>
</tr>
<tr>
<td>7110</td>
<td>PROGPLUN</td>
<td>PROGRESSIVE PLUMBING SUPPLY</td>
<td>VO</td>
<td>01-22</td>
<td>034002</td>
<td>1/20/2022</td>
<td>252863</td>
<td>68.29</td>
<td>0.00</td>
</tr>
<tr>
<td>7110</td>
<td>PROGPLUN</td>
<td>PROGRESSIVE PLUMBING SUPPLY</td>
<td>VO</td>
<td>01-22</td>
<td>034003</td>
<td>1/20/2022</td>
<td>2528925</td>
<td>18.11</td>
<td>0.00</td>
</tr>
<tr>
<td>7110</td>
<td>SUPPLY</td>
<td>SUPPLY DEV</td>
<td>VO</td>
<td>01-22</td>
<td>034014</td>
<td>1/27/2022</td>
<td>474194-00</td>
<td>187.31</td>
<td>0.00</td>
</tr>
<tr>
<td>7110</td>
<td>BANKS</td>
<td>BANK'S VACUUM SUPERSTORES</td>
<td>VO</td>
<td>01-22</td>
<td>034017</td>
<td>1/27/2022</td>
<td>10-137038</td>
<td>119.96</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Account Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,267.37</td>
<td>0.00</td>
</tr>
<tr>
<td>Acct</td>
<td>Vendor</td>
<td>Tran Desc</td>
<td>Tran Type</td>
<td>Period Post</td>
<td>Ref Nbr</td>
<td>Tran Date</td>
<td>ExRef Nbr</td>
<td>Debit Amount</td>
<td>Credit Amount</td>
</tr>
<tr>
<td>-------</td>
<td>--------------</td>
<td>--------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------</td>
<td>---------------</td>
<td>-----------</td>
<td>--------------</td>
<td>---------------</td>
</tr>
<tr>
<td>7111</td>
<td>PRO TECH</td>
<td>Repairs &amp; Maintenance-Equip.</td>
<td>VO</td>
<td>01-22</td>
<td>034001</td>
<td>1/20/2022</td>
<td>S22195</td>
<td>724.00</td>
<td>0.00</td>
</tr>
<tr>
<td>7115</td>
<td>J PUGH</td>
<td>Transportation</td>
<td>VO</td>
<td>01-22</td>
<td>034006</td>
<td>1/27/2022</td>
<td>MILEAGE</td>
<td>10.06</td>
<td>0.00</td>
</tr>
<tr>
<td>7120</td>
<td>ABOS</td>
<td>Dues</td>
<td>VO</td>
<td>01-22</td>
<td>033971</td>
<td>1/13/2022</td>
<td>04069</td>
<td>49.00</td>
<td>0.00</td>
</tr>
<tr>
<td>7120</td>
<td>ORION CH/</td>
<td>ORION AREA CHAMBER OF COMMERCE</td>
<td>VO</td>
<td>01-22</td>
<td>033999</td>
<td>1/20/2022</td>
<td>20435</td>
<td>165.00</td>
<td>0.00</td>
</tr>
<tr>
<td>7123</td>
<td>KNIGHT TE</td>
<td>Consulting Fees</td>
<td>VO</td>
<td>01-22</td>
<td>033978</td>
<td>1/13/2022</td>
<td>18702</td>
<td>175.00</td>
<td>0.00</td>
</tr>
<tr>
<td>7129</td>
<td>ACCOUNT</td>
<td>Contingency Professional</td>
<td>VO</td>
<td>01-22</td>
<td>033972</td>
<td>1/13/2022</td>
<td>59174256</td>
<td>509.21</td>
<td>0.00</td>
</tr>
<tr>
<td>7129</td>
<td>ACCOUNT</td>
<td>Contingency Professional</td>
<td>VO</td>
<td>01-22</td>
<td>033996</td>
<td>1/20/2022</td>
<td>59217559</td>
<td>783.40</td>
<td>0.00</td>
</tr>
<tr>
<td>7129</td>
<td>ACCOUNT</td>
<td>Contingency Professional</td>
<td>VO</td>
<td>01-22</td>
<td>034004</td>
<td>1/27/2022</td>
<td>59260517</td>
<td>783.40</td>
<td>0.00</td>
</tr>
<tr>
<td>7503</td>
<td>ELM USA</td>
<td>Capital Improvements</td>
<td>VO</td>
<td>01-22</td>
<td>033976</td>
<td>1/13/2022</td>
<td>46325</td>
<td>3,986.00</td>
<td>0.00</td>
</tr>
<tr>
<td>7515</td>
<td>BIBLIOTHECA</td>
<td>Plant Fund-Capital Expenditure</td>
<td>VO</td>
<td>01-22</td>
<td>033933</td>
<td>1/6/2022</td>
<td>INV-US50530</td>
<td>8,569.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Acct</td>
<td>Vendor</td>
<td>Tran Desc</td>
<td>Tran Type</td>
<td>Period</td>
<td>Post</td>
<td>Ref Nbr</td>
<td>Tran Date</td>
<td>ExRef Nbr</td>
<td>Debit Amount</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
<td>-----------</td>
<td>-----------</td>
<td>--------</td>
<td>------</td>
<td>--------</td>
<td>----------</td>
<td>-----------</td>
<td>--------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8,569.00</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>46,364.17</td>
</tr>
</tbody>
</table>
# Orion Township Public Library

*For the Month Ending January 31, 2022*

## Revenues

<table>
<thead>
<tr>
<th>Description</th>
<th>January Actual</th>
<th>Annual Budget</th>
<th>Actual To Date</th>
<th>Percent of Total Budget</th>
<th>Balance of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Taxes</td>
<td>1,474,817</td>
<td>2,600,000</td>
<td>1,474,817</td>
<td>57%</td>
<td>1,125,183</td>
</tr>
<tr>
<td>State Aid</td>
<td>0</td>
<td>28,000</td>
<td>0</td>
<td>0%</td>
<td>28,000</td>
</tr>
<tr>
<td>Penal Fines</td>
<td>0</td>
<td>60,000</td>
<td>0</td>
<td>0%</td>
<td>60,000</td>
</tr>
<tr>
<td>Copier Service</td>
<td>457</td>
<td>4,000</td>
<td>457</td>
<td>11%</td>
<td>3,543</td>
</tr>
<tr>
<td>Vending Machine</td>
<td>-5</td>
<td>0</td>
<td>-5</td>
<td>0%</td>
<td>5</td>
</tr>
<tr>
<td>Library Fines</td>
<td>1,097</td>
<td>15,000</td>
<td>1,097</td>
<td>7%</td>
<td>13,903</td>
</tr>
<tr>
<td>Interest Income</td>
<td>444</td>
<td>15,000</td>
<td>444</td>
<td>3%</td>
<td>14,556</td>
</tr>
<tr>
<td>Donation Income</td>
<td>21,245</td>
<td>25,000</td>
<td>21,245</td>
<td>85%</td>
<td>3,755</td>
</tr>
<tr>
<td>Miscellaneous Income</td>
<td>720</td>
<td>10,000</td>
<td>720</td>
<td>7%</td>
<td>9,280</td>
</tr>
<tr>
<td>Realized/Unrealized Gain/Loss</td>
<td>-648</td>
<td>0</td>
<td>-648</td>
<td>0%</td>
<td>648</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>1,498,128</strong></td>
<td><strong>2,757,000</strong></td>
<td><strong>1,498,128</strong></td>
<td><strong>54%</strong></td>
<td><strong>1,258,872</strong></td>
</tr>
<tr>
<td>Operational Expenditures</td>
<td>January Actual</td>
<td>Annual Budget</td>
<td>Actual To Date</td>
<td>Percent of Total Budget</td>
<td>Balance of Budget</td>
</tr>
<tr>
<td>-------------------------------------------------------------</td>
<td>----------------</td>
<td>---------------</td>
<td>----------------</td>
<td>-------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Salaries</td>
<td>133,803</td>
<td>1,510,000</td>
<td>133,803</td>
<td>9%</td>
<td>1,376,197</td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td>21,218</td>
<td>413,000</td>
<td>21,218</td>
<td>5%</td>
<td>391,782</td>
</tr>
<tr>
<td>Supplies, Programs</td>
<td>1,401</td>
<td>71,000</td>
<td>1,401</td>
<td>2%</td>
<td>69,599</td>
</tr>
<tr>
<td>Materials, Information Resources</td>
<td>619</td>
<td>243,500</td>
<td>619</td>
<td>0%</td>
<td>242,881</td>
</tr>
<tr>
<td>Automation, Computerized Reference</td>
<td>4,266</td>
<td>211,000</td>
<td>4,266</td>
<td>2%</td>
<td>206,734</td>
</tr>
<tr>
<td>Promotion, Publishing, Printing</td>
<td>0</td>
<td>22,000</td>
<td>0</td>
<td>0%</td>
<td>22,000</td>
</tr>
<tr>
<td>Telephone</td>
<td>193</td>
<td>3,000</td>
<td>193</td>
<td>6%</td>
<td>2,807</td>
</tr>
<tr>
<td>Utilities</td>
<td>4,711</td>
<td>53,500</td>
<td>4,711</td>
<td>9%</td>
<td>48,789</td>
</tr>
<tr>
<td>Repairs &amp; Maintenance</td>
<td>1,991</td>
<td>45,000</td>
<td>1,991</td>
<td>4%</td>
<td>43,009</td>
</tr>
<tr>
<td>Capital Improvements</td>
<td>3,985</td>
<td>60,800</td>
<td>3,985</td>
<td>7%</td>
<td>56,815</td>
</tr>
<tr>
<td>Insurance &amp; Workers Comp</td>
<td>0</td>
<td>50,000</td>
<td>0</td>
<td>0%</td>
<td>50,000</td>
</tr>
<tr>
<td>Education, Training &amp; Dues</td>
<td>214</td>
<td>27,603</td>
<td>214</td>
<td>1%</td>
<td>27,389</td>
</tr>
<tr>
<td>Mileage</td>
<td>10</td>
<td>7,000</td>
<td>10</td>
<td>0%</td>
<td>6,990</td>
</tr>
<tr>
<td>Professional &amp; Contractual Services</td>
<td>2,251</td>
<td>42,000</td>
<td>2,251</td>
<td>5%</td>
<td>39,749</td>
</tr>
<tr>
<td>Donation Expense</td>
<td>225</td>
<td>25,000</td>
<td>225</td>
<td>1%</td>
<td>24,775</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>0</td>
<td>2,500</td>
<td>0</td>
<td>0%</td>
<td>2,500</td>
</tr>
<tr>
<td>MTT Reimbursements</td>
<td>0</td>
<td>2,500</td>
<td>0</td>
<td>0%</td>
<td>2,500</td>
</tr>
<tr>
<td><strong>Total Expenditures</strong></td>
<td><strong>174,888</strong></td>
<td><strong>2,789,403</strong></td>
<td><strong>174,888</strong></td>
<td><strong>6%</strong></td>
<td><strong>2,614,515</strong></td>
</tr>
</tbody>
</table>
## ORION TOWNSHIP LIBRARY - TREASURER'S REPORT
### PLANT FUND ACTIVITY
January 2022

<table>
<thead>
<tr>
<th>BALANCE</th>
<th>RECEIPTS</th>
<th>DISBURSEMENTS/TRANSFERS</th>
<th>BALANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Beginning of month</td>
<td>Interest</td>
<td>Realized/Unrealized Gain/Loss</td>
</tr>
<tr>
<td>Lake Michigan CU MM (1)</td>
<td>$206,192.47</td>
<td>$61.12</td>
<td></td>
</tr>
<tr>
<td>Lake Michigan CU Savings (2)</td>
<td></td>
<td>$10.00</td>
<td></td>
</tr>
<tr>
<td>UBS Plant Fund (5)</td>
<td>$233,961.93</td>
<td>$1.86</td>
<td></td>
</tr>
<tr>
<td>First Natl Bank of MI Kalamazoo CD (14)</td>
<td>$250,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wells Fargo Bank CD S80 CD (15)</td>
<td>$100,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multibank Cash Account</td>
<td>$100,000.00</td>
<td>651.71</td>
<td></td>
</tr>
<tr>
<td>JPMorgan Chase NQ8 (17)</td>
<td>$100,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$990,164.40</strong></td>
<td><strong>$714.69</strong></td>
<td><strong>$0.00</strong></td>
</tr>
</tbody>
</table>

(1) Credit Union Money Market .50% interest
(2) Credit Union Savings
(5) Money Market Account, CD
* Change in value until the investment reaches maturity

(14) CD maturing 5/12/2023 @1.650% interest
(15) CD maturing 1/31/2022 @1.800% interest
(17) CD maturing 1/16/2029 @ 0.550% interest
### ORION TOWNSHIP LIBRARY - TREASURER'S REPORT
#### GENERAL FUND ACTIVITY
January 2022

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>Initial Balance</th>
<th>Initial Interest</th>
<th>Realized/Unrealized Gain/Loss *</th>
<th>Operations</th>
<th>Transferred</th>
<th>Checks issued</th>
<th>Transferred to PNC General</th>
<th>Transferred to other</th>
<th>End of Month Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>PNC Bank - General Checking (1)</td>
<td>$187,059.45</td>
<td></td>
<td>$1,501,580.31</td>
<td></td>
<td></td>
<td>($173,654.62)</td>
<td></td>
<td></td>
<td>$1,514,985.14</td>
</tr>
<tr>
<td>PNC Bank - General Savings (2)</td>
<td>$166,696.62</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$166,696.62</td>
</tr>
<tr>
<td>PNC Bank - Cafeteria (3)</td>
<td>$6,441.95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>($1,730.68)</td>
<td></td>
<td></td>
<td>$4,711.27</td>
</tr>
<tr>
<td>PNC - James Ingram Fund (4)</td>
<td>$2,985.24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$2,985.24</td>
</tr>
<tr>
<td>PNC Bank - Bastian Account (5)</td>
<td>$1,144.90</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$1,144.90</td>
</tr>
<tr>
<td>Genisys Credit Union MM (6)</td>
<td>$224,493.04</td>
<td>$66.73</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$224,559.77</td>
</tr>
<tr>
<td>Genisys Credit Union Savings (7)</td>
<td>$10.69</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$10.69</td>
</tr>
<tr>
<td>Michigan United CU MM (8)</td>
<td>$104,871.42</td>
<td>$8.86</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$104,880.28</td>
</tr>
<tr>
<td>Michigan United CU Sav (9)</td>
<td>$20.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$20.00</td>
</tr>
<tr>
<td>Chief Financial C U Sav (10)</td>
<td>$14.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$14.00</td>
</tr>
<tr>
<td>Chief Financial C U MM (11)</td>
<td>$217,752.56</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$217,752.56</td>
</tr>
<tr>
<td>UBS General Fund (13)</td>
<td>$1,613,967.74</td>
<td>$10.00</td>
<td>-$376.81</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$1,613,600.93</td>
</tr>
<tr>
<td>UBS Endowment Fund (14)</td>
<td>$65,511.68</td>
<td>$0.62</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$65,512.30</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$2,590,969.29</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>$3,916,873.70</strong></td>
</tr>
</tbody>
</table>

* Change in value until the investment reaches maturity

1. Business Checking
2. Business Savings Sweep
3. Cafeteria
4. Business Checking - Donation Account
5. Business Checking - Donation Account
6. High Yield Money Market .30% interest
7. Credit Union Savings
8. Credit Union Money Market 0.15% interest
9. Credit Union Savings
10. Credit Union Savings
11. Credit Union MM .40% interest
12. Money Market, Treasury Bills, CD's
13. Money Market, CD
14. Money Market, CD
Orion Twp. Public Library welcomes Chase McMunn as new director

By mmkelley on February 9, 2022 No Comment

By Megan Kelley

Review Writer

For decades, the Orion Township Public Library has been a bright spot in the Orion community. Its past directors have contributed to progress and updates that have had long-lasting impacts on the community as a whole.

After several months of searching for a replacement director to fill the position left vacant after the resignation of the previous director Karen Knox, the Orion Township Library Board of Trustees selected Michigan native, Chase McMunn.

McMunn has a Master of Library and Information Science from UCLA. He previously worked at Assistant Director for the County of San Luis Obispo Library in California. Before that he served as a Community Library Manager of Topanga and Malibu Libraries for the County of Los Angeles Library from 2011 to 2014. He also served as a Teen Services Librarian and Adult Services Librarian at the East Los Angeles Library and La Crescenta Library.

McMunn grew up in the Jackson area of Michigan and moved to California with his wife after getting his BA in History from the University of Michigan. Fifteen years and two children later, McMunn and his wife decided that they wanted to be closer to family.

“When I saw this opportunity, I was quick to jump on it,” McMunn said.

While he and his wife were looking for a family-friendly community, McMunn was also looking for a place that had community support.

“I saw it (the position) and it was clear that it was a library that was supported by its community. I think that’s always important; a great thing to see,” said McMunn. “I can tell the staff had things running really well. The programming they offered really impressed me.”

This is McMunn’s first time serving as a library Director and though this is a new experience, he is hopeful that it will be a learning opportunity.

“I thought it was a really good opportunity to sort of learn the ins and outs of being a director in this type of position,” McMunn said.

He also expects that a good amount of his previous experience will aid him in the transition in regard to leadership and general library management.
“I’ve stayed up to date on library trends and we certainly had to deal with the pandemic in our own way there (the County of San Luis Obispo Library in California),” McMunn said. “The specifics are all a little different, but I hope that the skills and training that I had through my experience there will carry over and help me learn this position.”

Some of his more immediate goals include continuing to build on the library’s current programming and technology but also includes COVID recovery.

“A big part of it going to be getting out in the community, getting to know everybody and inviting them back to the library,” McMunn said. “Try to get the community using it as much as they were before and even try to get the word out better.”

McMunn joins the short but impressive list of Orion Library Directors like Linda Sickles and Karen Knox.

“It’s clear that Karen and Linda knew what they were doing. They have things lined up really well. It’s always hard coming in knowing you have big shoes to fill,” McMunn said. “All I can do is the best that I can and luckily, I inherit a lot of the good work that they’ve done. I hope that we can continue to advance what they were doing and move on to new challenges.”

McMunn is looking forward to getting out into the community; meeting with residents and partnering with organizations.

“I hope that 2022 is a bit of a turnaround year, not just for the library but for society in general and that we can start to build what we had before,” said McMunn.

The Orion Township Public Library is open during its normal business hours. For more information regarding resources, events and programming visit www.orionlibrary.org.

---

*Orion Twp. Public Library welcomes Chase McMunn as new director added by mmkelley on February 9, 2022*

*View all posts by mmkelley →*
Pauline Ellen Hewitt, 90, of Lake Orion

Pauline "Polly" Ellen Hewitt passed away at her home January 17, 2022. She was preceded in death by her loving husband James Hewitt in 2005. She is survived by her sons, William (Pat) Hewitt and Michael Hewitt, her grandsons Brett Hewitt and Brian (Elyse) Hewitt, and her great-grandchildren Brady, Bodey, Max, and Reese.

Polly was in Lake Orion for her entire life. She graduated from Lake Orion High School in 1948 as secretary of her class. Polly worked as an office manager for Dr. Michael Kubinski for more than 30 years. She enjoyed her "second family" there and all the wonderful people she encountered.

Her favorite things to do were steak cookouts with the old gang, vacationing in Caseville with her family, playing cards with Steve, and talking with friends and family. A memorial celebration of life will be held at a later date this spring/summer. Memorial donations can be made to K9 Stray Rescue in Oxford.

Online condolences: sparksgriffin.com

Patrick Malloy, 49, of Oxford

Patrick Malloy, age 49, passed away unexpectedly on Sunday, Dec. 26, 2021, in Oxford. He was born in Pontiac on March 17, 1972. Patrick was the beloved son of the late Hugh Malloy and his mother Margaret (Margo). He is survived by his sister, Jackie (Rod) Koon and brothers Kirk and Hugh, Jr.

He leaves behind his girlfriend Allyson Comerz and her daughter Viviana, whom he loved and cared for. He is also survived by longtime family friends Jake Kelley and good friends Tom Pollack and Sue Walker.

Patrick loved music, playing his guitar and getting together with friends to sing and have jam sessions with their music. He also enjoyed biking and the outdoors.

A casual memorial service is planned for a future date. In Pat’s memory, the family asks you to do a random act of kindness for someone.
Library booksale canceled

The Friends of the Orion Township Public Library Gently Used Book Sale at the library from Jan. 19 to 22 has been canceled.

For information on volunteer opportunities, or becoming a Freinds member, visit orionlibrary.org/friends. — M.K.

Adult Book Discussions at Library

The Orion Township Public Library is holding weekly adult book discussions throughout the month of October:
- Jan. 20, 1:30 p.m. in the James Ingram Room the Thursday Afternoon Book Discussion group meets in the James Ingram Room.
- Jan. 24, 7 p.m. the Monday Evening Book Discussion group will meet in the James Ingram Room.

For a full list of book groups or book discussion kits visit orionlibrary.org/bookgroups. — M.K.

Teen Tuesday at Orion Library

It’s Teen Tuesday every Tuesday from 6:30 p.m. to 8 p.m. at the Orion Township Public Library.

Teen Tuesday is a casual hang-out for teens who enjoy anything from anime, comics, video games, board and card games, D&D, crazy Youtube clips, crafts and more.

Snacks are provided.

Online information: orionlibrary.org. — M.K.

Join the online English Language Learning Conversation Group

The English Language Learning Conversation Group meets online every Wednesday at 10:30 a.m. The group is led by all who wish to practice their English Language skills in a relaxed and informal setting.

The topics vary widely and it is a great learning experience as well as an opportunity to meet people within the community. Zoom details can be found at orionlibrary.org/calendar. — M.K.

Alzheimer’s Caregiver’s support group every 2nd Tuesday

Every second Tuesday of the month at 10:30 a.m. the Orion Township Public Library will host a support group for individuals who care for those with Alzheimer’s disease or other related dementias.

The group is led by a trained facilitator from the Alzheimer’s Association Michigan Chapter.

The group can be reached in person beginning September or virtually via Zoom until then. — M.K.

To have an event included in The Review’s Around Town section, email information to lake Orionreview@gmail.com. Advertisements and paid seminars/classes are not eligible for Around Town.

Orion Snowcation returns January through February

Orion Township Parks and Recreation is ready for winter fun activities through February with Orion Snowcation:
- Snow Sculpture Contest — through February 21. Show off your snow sculpting skills with your best snowman, snow dragon or sculpture. Register online at orionparks.com and post a photo collage of all the locations on the Picture This Snow Sculpture Event Facebook page.
- Night Tree — Feb. 20. Join Orion Parks online in making winter snacks for the outdoor animals this year. Follow along the link for YouTube Video: youtube.com/gw5GWW8Vhuo while a youth librarian from the Orion Township Public Library reads the story Night Tree by Eve Bunting.
- Car Bingo — Feb. 22. Come out to the Orion Center parking lot for Car Bingo. Each participant will get their own set of bingo cards and marker. Numbers will be read over the radio. Hunt your horn when you get a bingo to win a prize. — M.K.

COVID-19 Update

In the last 30 days there were 391 recent cases in the 48359 ZIP code, 518 new cases in the 48360 ZIP code and 519 new cases in the 48362 area.

Total numbers by ZIP code:
- 48359: 1,751 total cases, 18 deaths.
- Population of 9,634
- 48360: 2,212 total cases, 21 deaths.
- Population of 12,055
- 48362: 2,730 total cases, 22 deaths.
- Population of 15,756

This includes the Village of Lake Orion.

Source: oakgov.com/covid/casesbyZip.html.

Lake Orion Community Schools

As of Jan. 17, LCS reported 103 new cases of positive COVID-19 individuals in the district in the last week.

LCS has had 706 total positive cases among students and staff since the start of the 2021-22 school year, according to the district’s website, lakeorionschools.org.

Within the district boundaries, there are currently 1,074 cases of COVID-19, according to oakgov.com/covid/casesbyZip.html.

Oakland County

Oakland County overall has had 210,436 confirmed cases of COVID-19 and 27,510 probable cases, the highest in the state.

There have been 3,044 confirmed total deaths, along with 521 probable deaths from the virus, according to michigan.gov/coronavirus.

The MI Safe Start Map lists Oakland County at the highest risk level for contracting COVID-19, with an average of 17,360 new cases each week.

Around 72.4 percent of Oakland County residents have received their first dose of a vaccine and 66.4 percent are fully vaccinated.

Michigan

As of Monday, Michigan had a total of 1,746,707 confirmed cases of Coronavirus, 237,349 probable cases, 28,479 deaths and 2,230 probable deaths from COVID-19, since the pandemic began, according to michigan.gov/coronavirus.

The MI Safe Start Map lists the state at the highest risk level for contracting COVID-19, with an average of 128,153 new cases a week.

Michigan’s vaccine rate currently sits at 63.9 percent of people with at least one dose and 58.1 percent fully vaccinated.

United States

On Monday, the Centers of Disease Control and Prevention (CDC) confirmed 65,159,554 cases of Coronavirus in the United States as well as total 847,577 deaths from COVID-19, according to cdc.gov/coronavirus.

The CDC reports 2,097 million Americans are fully vaccinated with 74.9 percent of the total population having received at least one dose and 62.9 percent fully vaccinated. Additionally, 75.7 million Americans have received a booster dose.
f

1

Concordia

store
to

Football

Facilities

Zoom

store

Sheriff

Resident

Supt.

Fugitive

Sims

Rd

Lake

Lake

the

enrollment

students

Community

to

S

Lifers

S

Community

Prayers for Oxford

Oxford High School

Prayers for Oxford: Supporter rally for the Oxford community, Lake Orion residents hold candlelight vigil in Children's Park.

Year in Review

Continued from page 21

came together for a special dedication ceremony Saturday in Children's Park, honoring the late Anthony Reighard and remembering him for his commitment to family and community. Anthony Robert Reighard died unexpectedly on Jan. 23. He was 43 years-old.

This thieves break into Orion Twp. liquor store, make off with more than $80K and safe: The sheriff's office is looking for three suspects who broke into an Orion Twp. party store, made off with an estimated $50,000 from the store's safe and led authorities on a high-speed chase. It's believed that the same suspects attempted a break-in at a Joslyn Road gas station.

Orion Twp. board approves four medical marijuana provisioning center permits: The Orion Twp. board approved permits for four medical marijuana provisioning centers, or dispensaries, on Monday. Under Ordinance 154 (Licensed Marrijuana Facilities Ordinance), the township is limited to granting only four medical provisioning center permits.

LOHS student-athletes sign college letters of intent: Cross Papalulov (lacrosse, Concordia University), Bridget Finnanan (soccer, Lawrence Tech University), Kacy Lauer (soccer, Grand Valley State University), Evan Waters (baseball, Central Michigan University) and Tony Grafton (baseball, Kalamazoo Valley Community College).

Nov. 24

Lake Orion schools get an 'unspecified opinion' at annual audit presentation: LOHS had its annual audit presentation during the school board meeting Nov. 10, receiving an unspecified opinion, the highest assurance that can be provided, on the district's basic financial statements.

Pfifer named OAPG Citizen of the Year: The Orion Area Parade Group named Lake Orion resident, business owner and philanthropist Matt Pfifer as the 2021 Citizen of the Year.

John Blackstock resigns as Lake Orion football coach; Chris Bell returning to the sidelines: Varsity football coach John Blackstock resigned last week. Athletic Director and former head coach Chris Bell will replace Blackstock, who took over the program in 2017 when Bell became the district's athletic director.

Dragons volleyball falls to Marian in regional final: Marian High School dominated the match, winning 3-0 in the region 2 championship game. The Dragons finish their season as district champions, regional finalists and undefeated in the OAA Red Division (8-0).

Dec. 1

Village of Lake Orion to consider 'State of Emergency': Rising COVID-19 numbers are the impetus for a potential switch to Zoom meetings.

Help Orion Twp. Goodfellows: Stuff the Booth: The Goodfellows, for the 55th year, will hold their Stuff the Booth drive, taking donations in a firefighter boot to raise funds for their annual Christmas program.

Dec. 8

Four students dead; student and parents charged in OHS shooting: A mass shooting at Oxford High School resulted in the deaths of four students and criminal charges against a student and his parents:

Eleven people — 10 students and a teacher — were shot when a student opened fire on classmates at OHS around 1 p.m. on Tuesday, Nov. 30.

Three students — Tate Myre, 16; Hanna St. Julian, 14; and Madison Baldwin, 17 — died on the day of the attack. A fourth student, Justin Shilling, 17, died of gunshot wounds the following morning.

Of the seven wounded, four have been discharged from hospitals while three are in stable condition.

The suspected shooter, Ethan Crumbley, 15, is currently in the Oakland County Jail in Pontiac and is charged as an adult with one count of terrorism causing death, four counts of first-degree murder, seven counts of assault with intent to murder and 12 counts of possession of a firearm in commission of a felony.

The suspect's parents, Jennifer Crumbley and James Crumbley, are each charged with four counts of involuntary manslaughter.

Prayers for Oxford: Supporters rally for the Oxford community, Lake Orion residents hold candlelight vigil in Children's Park.

LOHS closes schools due to safety concerns in wake of OHS tragedy: Sept. Kirby details Lake Orion safety measures; counseling available for students.

LOHS student arrested, charged for threatening to 'shoot up' the school; police say: Just two days after the fatal shooting of four Oxford High School students, a 15-year-old sophomore at Lake Orion High School was arrested for allegedly saying he would "shoot up" the school if he could get a gun.

Detectives arrested the student for making a terrorist threat about 6:30 p.m. at his Orion Twp. home, an incident report from the Oakland County Sheriff's Office stated. The student is being held at Oakland County Children's Village.

Shooting at Beaumont Medical Center: Fugitive apprehension team is pursuing suspect: The Oakland County Prosecutor's Office authorized complaints of Assault with Intent to Murder, Armed Robbery and two counts of Possession of a Firearm in Commission of a Felony against the suspect, whose identity authorities have not released.

Dec. 22

LOCS enrollment numbers increase slightly, still down from 2019: Middle school numbers for below building capacity, no intention of closing a school, officials say.

Orion Twp. Public Library hires Chase McMunn as new director: The Orion Twp. Public Library board has hired Chase McMunn as the new director to replace Karen Knox, who resigned in the fall.

Fight at Johnny Black's LakeHouse ends with two people taken to area hospitals: Multiple police agencies and the Orion Twp. Fire Dept. responded to Johnny Black's LakeHouse shortly after 1 a.m. early Sunday morning when a fight broke out at the bar.

Two individuals were taken to area hospitals with non-life-threatening injuries. An employee was reportedly trying to escort an unruly customer out of business when a struggle ensued, causing both individuals to crash through a window.

First responders shut down Broadway Street between Flint and Front streets during the incident.

GMB Architects present LOCS bond plan for new Blanche Sims Elementary: The Blanche Sims project is the most expensive development of the LOCS three series, $160 million bond, projected to cost around $25.6 million. Construction on Blanche Sims is scheduled to begin in the spring of 2022 and finish in the fall of 2023.

Charges filed in shooting at Beaumont Medical Center: Fugitive apprehension team is pursuing suspect: The Oakland County Prosecutor's Office authorized complaints of Assault with Intent to Murder, Armed Robbery and two counts of Possession of a Firearm in Commission of a Felony against the suspect, whose identity authorities have not released.

Dec. 22

LOCS enrollment numbers increase slightly, still down from 2019: Middle school numbers for below building capacity, no intention of closing a school, officials say.

Orion Twp. Public Library hires Chase McMunn as new director: The Orion Twp. Public Library board has hired Chase McMunn as the new director to replace Karen Knox, who resigned in the fall.

Fight at Johnny Black's LakeHouse ends with two people taken to area hospitals: Multiple police agencies and the Orion Twp. Fire Dept. responded to Johnny Black's LakeHouse shortly after 1 a.m. early Sunday morning when a fight broke out at the bar.

Two individuals were taken to area hospitals with non-life-threatening injuries. An employee was reportedly trying to escort an unruly customer out of business when a struggle ensued, causing both individuals to crash through a window.

First responders shut down Broadway Street between Flint and Front streets during the incident.

Flowers, candles, stuffed animals and other items of remembrance were placed at the Oxford High School sign along Oxford Road. The first memorials were placed on Wednesday, Dec. 1 with more added each day. -- Photo by D. Vaglia
A calculate of places to go, people to see and things to do...

Friends of the Library booksale
The Friends of the Orion Township Library is hosting the Friends Gently Used Book Sale at the library from Jan. 19 to 22.

On Jan. 18 from 10 a.m. to 4 p.m. there is an exclusive preview of the sale is available to "Friends" members and teachers. The sale will be open to the public on the following days and times:
- Jan. 18 beginning at 4:30 p.m. to 8:30 p.m.
- Jan. 19 from 10 a.m. to 8:30 p.m.
- Jan. 20 from 10 a.m. to 8:30 p.m.
- Jan. 21 is Half Off Day and will be open from 10 a.m. to 4:30 p.m.
- Jan. 22 is $5 Bag Day and the sale will run from 9:30 p.m. to 1:30 p.m.

The Friends offer hard cover and soft cover books in over 40 categories, with prices at $1 or less. Cash, credit card and checks accepted. For information on volunteer opportunities or becoming a Friends member, visit orionlibrary.org/friends. -- M.K.

Adult Book Discussions at Library
The Orion Township Public Library is holding weekly adult book discussions throughout the month of October.
- Jan. 12, the Book Bunch discussion group meets at 1 p.m. at the Orion Center.
- Jan. 20, 1:30 p.m. in the James Ingram Room the Thursday Afternoon Book Discussion group meets in the James Ingram Room.
- Jan. 24, 7 p.m. the Monday Evening Book Discussion group will meet in the James Ingram Room.
For a full list of book groups or book discussion kits visit orionlibrary.org/book-groups. -- M.K.

Orion Snowcation returns January through February
Orion Township Parks and Recreation is offering a variety of fun activities through February with Orion Snowcation:
- Snow Sculpture Contest -- through Feb. 21. Show off your snow sculpting skills with your best snowman, snow dragon or sculpture. Register online at orionparks.com and choose your category (best overall snowman, best snow sculpture or Lake Orion Pride). Be creative and you could win a prize. Submit a photo of your creation to Orion Parks on Facebook.
- Game Day Swap -- Jan. 20. Visit the Orion Center from 9 a.m. to 5 p.m. with puzzles, books, DVDs and/or board games to swap with something else. The event is free and there is no registration required.
- Sledding and S’mores -- Jan. 21 at Jesse Decker Park. Hang out by a bonfire and roast s’mores and some sledding fun.
- Picture This Scavenger Hunt -- Feb. 1-6, solve riddles, find the location and share your pictures with Orion Parks. Register online at orionparks.com and post a photo collage of all the locations on the Picture This Scavenger Hunt Event Facebook page. Afterward, drop by the Parks and Recreation office at 1335 Jollyn Rd to claim your prize.
- Night Tree -- Feb. 20. Join Orion Parks online in making winter snacks for the outdoor animals this year. Follow along the Link for YouTube Video: youtu.be/gsSGWVHzznu while a Youth Librarian from the Orion Township Library reads us the story Night Tree by Eve Bunting.
- Car Bingo -- Feb. 22. Come out to the Orion Center parking lot for some Car Bingo. Each participant will get their own Car Bingo Card and Market. Numbers will be read over the radio. Honk your horn when you get a bingo to win a prize. -- M.K.

Forgotten Harvest – Orion Twp.
Anyone who wants to volunteer or donate can contact Orion Twp. Trustee Julia Dalrymple at dalrymple@oriontownship.org or message her at oriontrusteejulia@iname.com. The Village Pantry is also open and running from 10 a.m. – 2 p.m. on Monday’s and Wednesday’s at Woodside Bible Church. For more information about Forgotten Harvest, go to forgottenharvest.org. -- J.N.

Teen Tuesday at Orion Library
It’s Teen Tuesday every Tuesday from 4:30 p.m. to 8 p.m. at the Orion Township Public Library.
Teen Tuesday is a casual hang out for teens who enjoy anything from anime, comics, video games, board and card games, D&D, crazy YouTube clips, crafts and more. Snacks provided.
Online information: orionlibrary.org. -- M.K.

Join the online English Language Learning Conversation Group
The English Language Learning Conversation Group meets online every Wednesday at 10:30 a.m. The group is led by all who wish to practice their English Language skills in a relaxed and informal setting.
The topics vary widely and it is a great learning experience as well as an opportunity to meet people within the community. Zoom details can be found at orionlibrary.org/Calendar. -- M.K.

To have an event included in The Review’s Around Town section, email information to lakelanoreview@gmail.com. Advertisements and paid seminars/classes are not eligible for Around Town.
Orion Township Public Library

January 31, 2022

We had a lot of fun today with the students from the PHASES classrooms at the Pine Tree Center! They enjoyed a little chair yoga, stories, videos and sing-a-longs about winter and animal adaptations. Then they made a collage out of many different items and textures and also created a snowflake out of pretzel sticks and marshmallows! It was a great turnout and fun was had by all!

Orion Township Public Library

January 31, 2022

Do I really have enough assets to bother planning for? Where are all my important papers? Will it be difficult for my spouse or children to access my assets? What is Probate? Join local retirement specialist Oliver Lee this Wednesday, February 2nd at 2:00pm to learn more about Estate Planning and get the answers to these and many more questions!
Orion Township Public Library
January 31, 2022

World Read Aloud Day is this week! Check out Scholastic and LitWorld for fun activities!

0:08 / 22:25

Scholastic was live.
Jg2uantS1uar6y 31p anm0t 7812fs:o9r0e0 f9PM ·
Have a great time while you sing, listen, laugh, and learn along with Latin Grammy winning husband-wife team, 123 Andrés, as they perform some of their songs, a…
See more

Orion Township Public Library
January 31, 2022

TONIGHT!!! Join former Oakland County chief spokesman Robert Dustman as he discusses his book Defining Moments: A True Story of War, the gripping story of his father’s life during WWII. Copies of the book will be available for sale and to be signed by the author after his presentation.

Like
Comment
Share
Orion Township Public Library

January 30, 2022

We have a lot of great programs this week like the "Defining Moments" author presentation on Monday, the Teen Casino Mystery on Saturday, and our Football Party in a Bag Take & Make! Visit our website for more details.

<table>
<thead>
<tr>
<th>SUNDAY</th>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
<th>SATURDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00 AM - LITTLE LIT</td>
<td>11:00 AM - LITTLE LIT</td>
<td>12:00 PM - SPECIAL NEEDS ADULT PROGRAMMING (SNAP)</td>
<td>10:00 AM - LITTLE LIT</td>
<td>10:00 AM &amp; 11:00 AM - LITTLE LIT</td>
<td>10:00 AM &amp; 11:00 AM - LITTLE LIT</td>
<td>11:00 AM - SERVICE SOCIAL HOUR (ORION CENTER)</td>
</tr>
<tr>
<td>12:00 PM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
<td>10:00 AM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
<td>1:00 PM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
<td>10:00 AM - LITTLE LIT</td>
<td>10:30 AM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
<td>10:00 AM &amp; 11:00 AM - LITTLE LIT</td>
<td>11:00 AM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
</tr>
<tr>
<td>6:00 PM - MAKERSPACE OFFICE HOURS</td>
<td>7:00 PM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
<td>8:00 PM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
<td>2:00 PM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
<td>2:00 PM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
<td>2:00 PM - &quot;Defining a True Story of a True Author's Presentation&quot;</td>
<td></td>
</tr>
</tbody>
</table>

orionlibrary.org/calendar

Orion Township Public Library

January 29, 2022

The game is afoot! Join us next Saturday, February 5 at 2:00pm for the Teen Casino Mystery! Bring your detective skills and sixth sense as we try to uncover a list of suspects. Teens will be assigned roles from a cast list and work together to figure out who-dun-it. Pizza lunch will be provided! Registration required.

Like
Comment
Share
Orion Township Public Library

January 24, 2022

This Thursday at 7:00pm join members of various Olympic teams from the Detroit Skating Club as they share their personal stories, photos, videos, and artifacts from the Winter Olympics.

Meet an Olympian
Thursday, January 27 @ 7 pm
Join members of various Olympic teams from the Detroit Skating Club as they share their personal stories, photos, videos, and artifacts from the Winter Olympics.

Orion Township Public Library

January 24, 2022

Have a story to tell and don’t know where to begin? Want to participate in the Write On! Short Story Contest? Join us this Thursday at 6:30pm for writing tips, discussion, and fun with your peers. This workshop is open to all students in grades 3-5.

Write On!
Writing Workshop
Thursday, January 27, 6:30pm
Have a story to tell and don’t know where to begin? Would you like to participate in the Write On! Short Story Contest? Join us for writing tips, discussion, and fun with your peers. This workshop is open to all students in grades 3-5.
Orion Township Public Library
January 19, 2022

Orion Library patrons have 24/7 access to streaming and downloadable content in a variety of formats. Check out the CloudLibrary app! With an Orion Library card, Orion residents can download and access eBooks and downloadable audiobooks using a variety of devices. The app also features a virtual library card, eliminating the frustration of a forgotten or misplaced card. Your virtual card can be used for any library transaction that traditionally required a physical card. See more

Orion Township Public Library
January 15, 2022

The Orion Library was not invited to participate in the State of Michigan’s pilot program to offer free at-home COVID tests to residents and we do not have any to tests to distribute. For more information on the program and to see a list of libraries that may have kits available, see the following press release - https://www.michigan.gov/.../0,9753,7-406-98163-575596...

MICHIGAN.GOV

Coronavirus - MDHHS partnering with libraries across the state to offer free at-home testing kits for Michiganders

Description: Coronavirus -

Orion Township Public Library
January 13, 2022

Happy National Rubber Ducky Day! Stop by the Youth Department for some fun crafts and activities as well as our month long Duck Hunt!

Orion Township Public Library
January 13, 2022

2Lisa Russell and 1 other
Like
Comment
Share
**Orion Township Public Library**

**January 12, 2022**

Today's Little Lit storytimes have been cancelled. Apologies for any inconvenience. But don't worry! You can still go on our Youth Department Duck Hunt!

---

**Orion Township Public Library**

**January 9, 2022**

In celebration of National Rubber Ducky Day (January 13), patrons can participate in our month long duck hunt, kicking off TODAY, where we will have in library duck themed activities and fun!

---

**Orion Township Public Library**

**January 7, 2022**

This is going to be a pretty empty Artist of the Month wall without our Pet Picassos. Don't forget to drop off your pet's masterpiece before the end of January to be showcased all month long in the lobby!
Orion Township Public Library
January 5, 2022

The ASL Night with the Library-Sign Language Rocks! virtual event is designed to engage patrons through games and activities that are fun, while learning various signs. An excellent class for beginners and intermediate learners, it can also be enjoyed by individuals that have more advanced skills. Class is taught in ASL. Registered participants will be emailed the Zoom link the day of the program.

Orion Township Public Library
January 3, 2021

2021's 50 Books in 52 Weeks has ended. Congrats to all who accepted the challenge! Prizes will be available to pick up through January 7, 2022. While supplies last.
MDHHS guidelines regarding COVID-19 have not changed since the last month. Case numbers in Oakland County continue to decline quickly. We will continue with our current policies for mask-wearing, reporting, and isolating until MDHHS offers new guidelines.

The library closed early on February 2, 2022 due to inclement weather. We reopened for normal hours of operation the following day.

The annual financial audit was scheduled for week of February 21, but with an open Financial Specialist position we needed a little extra time this year. Jessica reached out to Maner Costerisan to change the dates, and it will now be the week of April 25.

**January Services**

**Outreach**
- Books by Mail: 6
- Homebound Deliveries: 35

**Youth**
- Youth Book Bundles: 2
- Ring me a story calls: 2 story, 3 joke, 0 fairytale = 5 total
- Bright by Text: 4 texts, reaching 291 subscribers

**Adult**
- Makerspace appointments: 7
- 3-D prints: 0, the 3D printer was down for most of January, repairs are underway.
- Notary: 4
- Storywalk: Moving to a bimonthly schedule due to time it takes and feedback from local businesses, put up a new story this week.

**Youth Programs**

**In-Person**
- SENSEsational Storytime: 20
- Bounce and Boogie: 24
- Write On! Writing Workshop: 2

**Take and Make**
- Cool Kaleidoscopes: 40
- Create with your Crew: 36
- Grow your own snowflake: 30

**Virtual**
- Battle of the Books Meetup: 90

**Teen Programs**

**In-Person**
- Teen Tuesday: 25, 4 sessions

**Take and Make**
- Waterless Snow globes: 25

**Adult Programs**
In-Person
- Book Discussions: 12, 2 sessions
- Makerspace office hours: 1
- Orion Historical Society: 4
- Defining Moments Book Talk: 3
- Meet an Olympian: 7

Virtual
- Writer’s Workshop: 5
- Sign Language Rocks: 2
- Michigan Works: 0
- Alzheimer’s Support Group: 4

Outreach Programs
- ELL: 20
- Book Bunch Book Club: 8
- Memory Lane: 57
- Senior Moments: 5
- SNAP: 50
- Senior Social Hour: 11
- Outreach Book Clubs: 12

Programming highlights include a very successful SNAP program. Lori hosted 50 students from the PHASES group. They send a nice Thank You card, which is included in the Board Packet.

The passive program 50 Books in 52 Weeks concluded; there were 208 participants and a total of 3,330 books logged. The adult department is planning some Take and Make activities that were not on the calendar to address lower than average turnout to in-person programming. The Senior Winter Reading program is now underway and has 39 participants registered thus far. Mary started the Senior Social Hour and Senior Moments activities as reoccurring events at the Orion Center; the social hour will be held twice per month, and Senior Moments once per month.

Dan submitted an NEA Big Read Grant for $6,000, which includes reading and art programs with the Orion Art Center. The library received $2,225 ARPA funding through IMLS/Library of Michigan; the funding was allocated to the MCLS Overdrive group to add titles to the e-material collection from a curated list.

The Youth Department held a passive Duck Hunt scavenger hunt in the building, and 133 patrons participated. The Youth Services team also hosted their first 2022 Battle of the Books event on Zoom, and had 90 students participate. The team continues to promote the Battle of the Books; 130 students from 29 teams were registered as of February 1, 2022.
The online passive program 1000 Books Before Kindergarten now has 341 users registered, and 41 finishers. The 500 Books Before 5th Grade has 228 children registered, and 7 finishers.

James continued outreach to Pre-K classes, and visited 4 classes. Our new School Outreach Librarian, Kerry, has been training on library operations and visiting K-5 classes with James as she takes on her new role. Together they visited 5 schools. James was featured on Lake Orion Community Schools’ social media promoting early literacy storytime at the Early Childhood Center’s library.

Ashley and James were chosen to present about community outreach at Michigan Library Association’s Youth Services Spring Institute conference March 10-12 in Mount Pleasant.

With Demco announcing that Wandoo, the service we use for our online passive programming was being eliminated, staff reviewed potential replacements. We settled on Beanstack from Zoobean. Beanstack provided the best app for the patron experience, and made book entry simple with ISBN scanning. Participation numbers will be transferred to the new app, but reading logs will not. If patrons request a copy of their previous reading logs we will export a copy and send it to them so they have it for their records.

The Social Media Committee have started to plan the campaign to actively promote the library app. It has been available in the app store and Google Play store for several weeks now, staff has tested it and there has not been any negative feedback.

We have made Vega Discover the default catalog linked to our website. Innovative was able to add a link to the password reset, which was a feature requested by many users. The new catalog features records for similar items rolled together to appear as one item in the search, and allows patrons to put holds on e-materials without leaving the catalog. We hope as more people use the new catalog we will receive more feedback and feature requests. The classic catalog is still available for those that are more comfortable with the old look.

Our 24/7 Hold Lockers are fully operational and have been wrapped with the library’s branding. When a patron chooses their pickup location for a hold, they can now select “24-7 Hold Locker” and staff will place the material in the locker. With the lockers installed, the exterior doors will be left unlocked for 24/7 access. Curbside services hours will be removed beginning February 12, 2022 due to extremely low use, 3 patrons a week. For those that are unable to enter the library, we will work with them on an appointment basis.

Sabrina will be leading a committee for planning a “Garage Sale” later in the year, most likely around June. There is some clutter in the maintenance area/warehouse and we would like to clean that out and get rid of some unneeded items.
Chase attended the Friends of the Library meeting on February 8, 2022. The Friends discussed some possible fundraising activities, hosting a volunteer gathering event in March, and details of their May Booksale. He also attended the Township Municipal Building open house on February 1, 2022 and the Chamber of Commerce Annual Breakfast on February 10, 2022. He was able to meet some of the staff of ONTV, the Chamber of Commerce, and other community members.
Dear Lori and Team,

We enjoyed our time at the library! Thank you for the opportunity, we look forward to visiting again!

Phases Staff

Nick

Broeden Ball

The students enjoyed the visit!

Ms. Sammy Zach

morissobroady

MUST IF

All phases students

Thanks for fun!

-Viola
## Statistical Report - Usage for the month of January 2022

### Circulation

<table>
<thead>
<tr>
<th></th>
<th>Current month</th>
<th>This month last year</th>
<th>Current FYTD</th>
<th>Previous FYTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Library Circ Checkouts</td>
<td>7,295</td>
<td>7,063</td>
<td>7,295</td>
<td>7,063</td>
</tr>
<tr>
<td>Main Library Self Checkouts</td>
<td>8,167</td>
<td>0</td>
<td>8,167</td>
<td>0</td>
</tr>
<tr>
<td>Renewals</td>
<td>11,505</td>
<td>6,177</td>
<td>11,505</td>
<td>6,177</td>
</tr>
<tr>
<td>Orion Cntr Branch Checkouts</td>
<td>82</td>
<td>0</td>
<td>82</td>
<td>0</td>
</tr>
<tr>
<td>ILL Items borrowed</td>
<td>666</td>
<td>514</td>
<td>666</td>
<td>514</td>
</tr>
<tr>
<td>ILL Items loaned</td>
<td>490</td>
<td>501</td>
<td>490</td>
<td>501</td>
</tr>
<tr>
<td><strong>Total Physical Checkouts</strong></td>
<td><strong>27,715</strong></td>
<td><strong>13,754</strong></td>
<td><strong>27,715</strong></td>
<td><strong>13,754</strong></td>
</tr>
<tr>
<td><strong>E-books (OD &amp; CL)</strong></td>
<td><strong>12,847</strong></td>
<td><strong>15,020</strong></td>
<td><strong>12,847</strong></td>
<td><strong>15,020</strong></td>
</tr>
<tr>
<td><strong>E-audiobooks (OD &amp; CL)</strong></td>
<td><strong>1,887</strong></td>
<td><strong>2,031</strong></td>
<td><strong>1,887</strong></td>
<td><strong>2,031</strong></td>
</tr>
<tr>
<td><strong>E-magazines</strong></td>
<td><strong>341</strong></td>
<td><strong>684</strong></td>
<td><strong>341</strong></td>
<td><strong>684</strong></td>
</tr>
<tr>
<td><strong>Hoopla</strong></td>
<td><strong>1,546</strong></td>
<td><strong>1,829</strong></td>
<td><strong>1,546</strong></td>
<td><strong>1,829</strong></td>
</tr>
<tr>
<td><strong>Kanopy</strong></td>
<td><strong>54</strong></td>
<td><strong>87</strong></td>
<td><strong>54</strong></td>
<td><strong>87</strong></td>
</tr>
<tr>
<td><strong>Total digital checkouts</strong></td>
<td><strong>16,675</strong></td>
<td><strong>19,651</strong></td>
<td><strong>16,675</strong></td>
<td><strong>19,651</strong></td>
</tr>
</tbody>
</table>

**YTD % Change phys circ:**

- **Total Physical Checkouts:** 101.51%
- **Total digital checkouts:** -15.14%

**YTD % Change digital circ:**

- **Total Circulation:** 32.88%

---

### Number of Items in our Collection

<table>
<thead>
<tr>
<th></th>
<th>Current month</th>
<th>This month last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>91,136</td>
<td>90,350</td>
</tr>
<tr>
<td>Audio (physical)</td>
<td>10,272</td>
<td>10,167</td>
</tr>
<tr>
<td>Video</td>
<td>18,654</td>
<td>18,379</td>
</tr>
<tr>
<td>E-books</td>
<td>91,276</td>
<td>88,409</td>
</tr>
<tr>
<td>E-audiobooks</td>
<td>53,877</td>
<td>45,633</td>
</tr>
<tr>
<td>Other</td>
<td>10,182</td>
<td>10,181</td>
</tr>
<tr>
<td><strong>Total Items</strong></td>
<td><strong>275,397</strong></td>
<td><strong>263,119</strong></td>
</tr>
</tbody>
</table>

**Card Holder numbers are smaller because we deleted expired cards from 2017**

### Number of Library Card Holders

<table>
<thead>
<tr>
<th></th>
<th>Current month</th>
<th>This month last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents *</td>
<td>19,091</td>
<td>19,091</td>
</tr>
<tr>
<td>Non-Residents *</td>
<td>4,002</td>
<td>4,002</td>
</tr>
<tr>
<td><strong>Total Card Holders</strong></td>
<td><strong>23,093</strong></td>
<td><strong>23,093</strong></td>
</tr>
</tbody>
</table>

**YTD % Change:**

- **Total Circulation:** 32.88%

---

### Program attendance Statistics

<table>
<thead>
<tr>
<th></th>
<th>Current month</th>
<th>This month last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting Room bookings (public)</td>
<td>101</td>
<td>0</td>
</tr>
<tr>
<td># Programs for adults</td>
<td>10</td>
<td>32</td>
</tr>
<tr>
<td># Programs for children</td>
<td>23</td>
<td>22</td>
</tr>
<tr>
<td># Programs for teens</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td># School visits for Think Link</td>
<td>15</td>
<td>6</td>
</tr>
<tr>
<td>Program attendance for adults</td>
<td>38</td>
<td>312</td>
</tr>
<tr>
<td>Program attendance for children</td>
<td>500</td>
<td>533</td>
</tr>
<tr>
<td>Program attendance for teens</td>
<td>52</td>
<td>52</td>
</tr>
<tr>
<td>Attendance school visits Think Link</td>
<td>543</td>
<td>67</td>
</tr>
</tbody>
</table>

### Technology Usage Statistics

<table>
<thead>
<tr>
<th></th>
<th>Current month</th>
<th>This month last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer signups</td>
<td>473</td>
<td>0</td>
</tr>
<tr>
<td>Wireless users</td>
<td>850</td>
<td>850</td>
</tr>
<tr>
<td>Web site hits - desktop users</td>
<td>11,984</td>
<td>10,724</td>
</tr>
<tr>
<td>Web site hits - mobile users</td>
<td>9,026</td>
<td>8,804</td>
</tr>
</tbody>
</table>

### Other Usage Statistics

<table>
<thead>
<tr>
<th></th>
<th>Current month</th>
<th>This month last year</th>
</tr>
</thead>
<tbody>
<tr>
<td># Visitors to Main Library</td>
<td>7,875</td>
<td>0</td>
</tr>
<tr>
<td># Visitors to Orion Center branch</td>
<td>231</td>
<td>0</td>
</tr>
<tr>
<td># Volunteer hours</td>
<td>122</td>
<td>0</td>
</tr>
<tr>
<td># Notarized documents</td>
<td>18</td>
<td>14</td>
</tr>
<tr>
<td># Think Link requests for books</td>
<td>20</td>
<td>8</td>
</tr>
<tr>
<td># Think Link check outs</td>
<td>46</td>
<td>74</td>
</tr>
</tbody>
</table>

---

* As of June 28, 2021, OTPL moved to Phase 5, there are no restrictions from MDHHS: no capacity limits, masks not required
* As of February 1, 2021 move to Phase 4, allowing limited number of patrons by appt for technology use and individual study rms
* As of March 15, 2021 Phase 4+, allowing for 50% building capacity and grab & go service
* As of June 1, 2021 Phase 4+, vaccinated patrons/staff not required to mask, 50% bldg capacity, no patron time limit, not public mtgs
Open Meetings Act Changes for Libraries Introduced in the Michigan House as HB5689

Allowing library boards to meet remotely has taken on new purpose with increased engagement/attendance of the public in remote meetings, and recognizing the extreme geographic distances travelled by many board members to participate at in-person meetings.

The Michigan Library Association (MLA) is pleased to inform you that today, Representative John Damoose (District 107) has introduced House Bill 5689 which will update Section 3a (MCL 15.263a) as amended by 2021 PA 54 of the Open Meetings Act to allow cooperative library boards and local library boards to meet virtually if they choose. The bill was referred to the Local Government and Municipal Finance Committee.

The MLA Advocacy and Legislative Committee, led by Jessica Keyser, director at the Grosse Pointe Public Library; and our lobbyist at GCSI, Bob DeVries; have put an extraordinary amount of thoughtful time and energy into the development of this legislation with Representative Damoose. While there have been a number of proposed revisions introduced to the Open Meetings Act, we want to make clear that none have moved past introduction since mid-2021 with the political divisions we now see. (These bills are documented in the MLA Bill Tracker on the MLA website.)

With that said however, the most recent update to this particular section of the Open Meetings Act has allowed those in an agricultural commodity group to meet through electronic means. MLA hopes to emulate their success by giving libraries the option of meeting remotely as well.

We are very grateful to Rep. Damoose for recognizing the challenges faced by our libraries when it comes to meeting in-person, and to Val Meyerson, Director of the Petoskey District Library for continuing to bring this item to his attention – it is all about relationships.

MLA’s communication plan and templates for use by library staff, trustees and others to get involved in advocating for support of this legislation are being finalized and will be announced soon. We hope you will be ready to advocate and let your Representatives know the importance of passing this bill.

Debbie

Deborah E. Mikula
Executive Director
Michigan Library Association
3410 Belle Chase Way, Suite 100
Lansing, MI 48911
Office: 517-394-2774, ext. 5
Direct: 517-881-1266 *Please note new number
dmikula@milibraries.org
www.milibraries.org
LA Connect Advocacy Hour: Understanding the Importance of Headlee Amendment and Proposal A Reform

We are pleased to welcome representatives from the Michigan Township Association, the Michigan Municipal League and the Michigan Association of Counties to February's MLA Connect Advocacy Hour all about the Headlee Amendment and Proposal A Reform.

On Thursday, February 17 at 10:00 AM, we are excited to welcome representatives from three statewide local government organizations to discuss the Headlee Amendment. MLA Advocacy and Legislative Chair Jessica Keyser will moderate a panel discussion with special guests Deena Bosworth, Director of Governmental Affairs, Michigan Association of Counties; Chris Hackbarth, Director, State & Federal Affairs, Michigan Municipal League; and Judy Allen, Director of Government Relations, Michigan Townships Association.

The effect of Headlee and Proposal A together means that millage rates are permanently reduced (or “rolled back”) during periods of economic growth, which achieves the desired outcome of protecting taxpayers from taxes that are too high. However, during periods of economic recession, when property values decline, there is currently no mechanism to restore millage rates to the amount voters originally approved.

It is the position of MLA that in an economic downturn when values are decreasing, millage rates should be allowed to go up at the same rate of inflation. MLA supports legislation to reform Headlee and Proposal A and help to stabilize library revenues during an economic downturn.

With the majority of funding for public libraries (approximately 80% overall) coming from property tax revenues in the form of dedicated millages, we invite you to come and hear how MLA will work in partnership with MML, MTA and MAC in defense of the proposed legislation that will create sustainable funding for libraries.

Mark your calendars now and click the button below to register for upcoming MLA Advocacy Hours! After registering, you will receive a confirmation email containing information about joining the meeting.
Questions?

Contact us at (517) 394-2774 or mla@milibraries.org.

MLA Connect Advocacy Hours are an opportunity for the library community to learn more about MLA’s advocacy and legislative priorities including funding, elections, property taxes, literacy, internet access, privacy, intellectual freedom, and more. Each month, we will address a new topic and share any pending legislation introduced in the House or Senate that could impact the Michigan library community.

This advocacy hour is free to attend to anyone interested in joining the conversation! A maximum of 500 attendees can join the live event. Registered attendees will receive information and a link to access the meetings on the Zoom platform. A recording of the events will be available on the MLA website for those unable to attend the live events.
LOCAL

Reading Between the Lines

Over the last year ImagineIF Library staff has described a majority of trustees as creating a hostile environment that is antithetical to the organization's philosophy

BY MICAH DREW
FEBRUARY 2, 2022
On Sept. 27, 2021, ImagineIF Library Trustee David Ingram sent out emails to other trustees, as well as the Flathead County commissioners, with a link to a video from a Virginia school board meeting.

The meeting was about two controversial queer-themed books in the school library, “Lawn Boy” by Jonathan Evison and “Gender Queer” by Maia Kobabe, which have made headlines and spurred politically charged discussions about their removal from public libraries nationwide.

In his email, Ingram warned that ImagineIF’s collection included both titles, telling the trustees he was “sure it will lead to further discussion,” while advising the commissioners he intended to review the collection development policy “in the near future” in light of the national debate.

Commissioner Randy Brodehl responded that he supported actions to “fix this.”

No complaints about either title had yet been made by members of the reading public.

Around the same time, interim ImagineIF Director Martha Furman circulated an internal memo addressing the national controversy surrounding the books before ultimately deciding to wait until a formal challenge was issued to send it out to the public.

Days after Ingram first sent the Virginia school board video to trustees, his colleague on the board, Doug Adams, exchanged emails with both Ingram and the board's chair, Heidi Roedel, about the books.

“It’s my sincere hope that someone files a complaint about these two books,” Adams wrote. “If those books get removed, and I believe they will, it’s really gonna tick [interim director] Martha off. I think we’d be wise to play ‘what if’... What if Martha resigns before we have a new director, who would we put in charge?”
"Regarding the possible resignation, that may be the opportunity to ‘temporarily’ have a manager with straight business experience hold things together as we had discussed," Ingram responded. "MSL [Montana State Library] would not be happy."

"I think we need to get rid of those 2 books," Adams replied. "It’ll stoke the ... fire."

The exchange is based on emails between trustees, county commissioners and library personnel over the past year, which the Beacon obtained through a series of public records requests. In some instances, the communications between appointed public officials betray an ulterior motive shared by several board members, who characterized their positions, as well as their reason for seeking them, as being more about changing the library's governing policies than serving as trustees of a community resource. As a result, morale has plummeted within the public library's leadership ranks as ImagineIF struggles to recruit and retain a qualified director, having lost both its previous director and interim director to resignations in just six months.

Most recently, the board moved forward with hiring a new library director who does not meet Montana's public library standards for a community the size of the Flathead Valley. The decision was made despite concerns expressed by staff, the ImagineIF Library Foundation and members of the public, and will result in a loss of more than $35,000 in annual funding from the state. The contentious vote means that out of 82 libraries in the state, ImagineIF will be one of just four that are not certified, according to Montana State Librarian Jennie Stapp, and the only non-certified library serving a community larger than 4,000 residents.
Challenged

When ImagineIF received the formal challenges for the two books in October, professional library staff began an official review of the material in order to make a recommendation to the trustees, all of whom were required to read the book.

In early December, trustees Ingram, Adams and Roedel exchanged emails about how to handle the challenge, including a suggestion to remove all graphic novels as a genre category, as “Gender Queer” is a graphic novel, asking whether other graphic novels in the collection are “infantile” or “vulgar.”

Anticipating the possibility of litigation over the removal of books from ImagineIF’s collection, Adams and Ingram brainstormed ideas to avoid a lawsuit, public records indicate, including the possibility of creating a restricted section of the library to house the titles, as well as voting to retain the books “as long as we make a big deal that ‘intellectual freedom’ has made us slaves to ALA [American Library Association].
philosophy and that we’ve been neutered,” according to Adams. “That would give us justification for changing the policy.” The two trustees also expressed their dislike of the collection development webinar provided by the Montana State Library for trustees, with Adams calling the person who led the presentation an “idiot” and both expressed a desire to find a Christian library resource to guide them. In a follow-up statement to the Beacon, Ingram said he would look at “any policy language that provided guidance” on protecting minors without interfering with adult access.

A month before the book challenge was publicly discussed by the board, Adams told trustees he had rewritten the collection policy, which he has called vague and disingenuous, ignoring the standard procedure of letting staff, a director or a chosen committee draft the policy.

The trustee manual set forth by the Montana State Library includes guidelines on collection management policy and handling complaints, stating that trustees should, as a rule, defend the right to read.

“As a trustee, you should officially adopt and support the ALA Bill of Rights and Freedom to Read statement,” according to the manual, which also instructs trustees to defend the existing selection policy during a challenge. In an interview with the Beacon, Adams said he should not be required to defend a policy he doesn’t agree with, and since last summer he has stated his intention to disassociate ImagineIF from the ALA, as well as the Montana Library Association.

On Jan. 13, the five-member board unanimously voted to retain “Lawn Boy,” but in a 3-2 decision indefinitely suspended discussion on “Gender Queer,” with plans to revisit the issue after the ImagineIF policies were changed to allow for removal.

According to Jennie Stapp, the state librarian, there is no precedent in Montana for a library board to change its collection development policy in the wake of a book challenge, and especially not in the midst of one.

Even if the policy is changed so that removal of the books no longer constitutes a violation of library policy, Stapp said there may be grounds for a lawsuit if a group or individual believes the board is engaging in censorship and violating First Amendment rights.
In an email, Adams described the current library policy as an obstacle to achieving his overarching goal.

“I'd love to rewrite the policies so that we can do our jobs unfettered,” Adams stated. “Then I'd be willing to take on a lawsuit.”

![Image](image_url)

ImagineIF Library board member Doug Adams speaks at an ImagineIF Library board of trustees meeting in Kalispell on Dec. 2, 2021. Hunter D'Antuono | Flathead Beacon

**The Board**

Library staff have stated concerns about the direction of the library board dating back several years, coinciding with the appointment of Roedel, the current chair, in 2018 and the subsequent appointments of Doug Adams in 2019 and Dave Ingram in 2021, all of whom were appointed against the recommendation of longtime sitting board members but at the behest of county commissioners.
ImagineIF Trustee Connie Leistiko, a former teacher, attorney and law school dean, has served on the board since 2008, and was reappointed twice. Her tenure ends this year.

Marsha Sultz, who along with Leistiko has been in the minority of most split-board votes over the last year, has served on the board since 2017. She previously worked both at ImagineIF and at the Flathead High School library.

“This library has become an absolute jewel of this community, an asset that you can’t put a price on,” Leistiko said at a recent board meeting. “To have new people come on the board and think they get to start all over again, it’s very upsetting to me.”

According to Adams, two different county commissioners requested he apply for the library board over the years, but it wasn’t until he found himself upset over the way the board handled a controversial children’s book, “Prince and Knight,” that he put his name forward. Adams said the people responsible for reading the book during storytime should be fired and in his application he stated the board had lost its objectivity and neutrality.

At a county commission meeting in 2019 to appoint a new board member, numerous people spoke in favor of reappointing incumbent member and board chair Michael Morton, including the library director, foundation president, and three trustees.

Commissioner Brodehl expressed his displeasure that those who spoke in favor of Morton did not speak about the other candidates.

“It’s important we appoint board members who we believe represent the citizens of Flathead County,” he said. “We shouldn’t base our decision on the desires of the board.”

Adams was appointed unanimously. Ingram was appointed last year to replace award-winning trustee Al Logan and has stated in emails he is “less concerned about ‘learning to be a trustee’ instead of taking care of business.”

A main business of the trustees is crafting the library’s budget, which is ultimately approved by the county commissioners. The current budget has essentially remained flat for the past six years, despite a rapidly growing population and tax
base in the county, as well as a higher cost of living, making it difficult to attract and retain qualified staff.

ImagineIF staff salaries account for roughly 65% of expenditures and have increased every year for the last decade due to cost of living adjustments and step increases that are decided at the county level. However, local tax revenue has not kept pace with staffing costs. From FY18 to FY19, staffing costs grew by more than $32,000, while allotted tax revenue decreased by nearly $65,000. Through the current fiscal year, local tax revenue still falls short of FY17 numbers, while salary costs have risen 12%.

As the largest budget line, trustee Adams homed in on salaries as the most effective way to trim the library's budget. He's led the charge to reclassify vacant staff salaries, and has expressed a desire to freeze all current salaries. In August, Adams pushed for lowering the director's salary, which was set by a previous trustee board at a starting salary of $84,552. Adams attempted to reduce the salary by $25,000 before settling for a nearly $10,000 cut, against the advice of the former interim director and the county Human Resources Director Tammy Skramovsky, who cited the difficult hiring climate, the increased cost of living and the salaries of equivalent library positions as reasons not to slash the pay.

Skramovsky told the Beacon it was the first time she could recall that a director level salary was lowered against the recommendation of the county’s Human Resources Department.

In September 2021, the board also voted to lower the vacated children's librarian position salary by 11%, and opted against filling an open cataloguer position, instead directing those salary savings toward increasing wages for the materials handlers.

"The reality is the community has not really paid for the level of service that we've been providing over the years and there is going to be a pinch," Furman told the library's trustees shortly before her departure.
ImagineIF Library interim director Martha Furman, pictured at a library board of trustees meeting in Kalispell, has resigned her position on Dec. 2, 2021. Hunter D’Antuono | Flathead Beacon

**Revolving Director Door**

On top of the underlying board tension is a visible loss of longtime staff over the last year. Four librarians holding professional degrees have left their positions at ImagineIF in favor of new jobs at different libraries, including former director Connie Behe, who resigned last summer after the board decided to renew her contract. Behe attributed her departure, in part, to hostility from both trustees and county commissioners, including heavy-handed reminders that they control both funding and the makeup of the board. She also expressed frustration at the disrespect for professional librarians, feeling her own expertise was continually disregarded and her character vilified in the public sphere.

Upon Behe’s departure, assistant director Martha Furman stepped up as interim director, but said even before she took the position that she detected hints of trouble with the board, including hesitation around her promotion to assistant director and sentiments among trustees that library staff was overpaid.
In discussions over hiring a new director, Furman’s express warnings against removing the requirement of holding a master’s degree in library science (MLS) and lowering the salaries were ignored by the trustees’ majority, who offered their own preferred requirements.

“A director without any agenda except customer service would be great,” wrote trustee Ingram, while Roedel and Adams expressed the need to hire someone willing to make their desired policy changes happen.

Furman resigned after four months.

“I reached a point where I thought no one would want to do this job,” Furman said in an interview. “In the 15 years I was there, worked in library leadership and attended board meetings, I’ve never seen a board behave like that. In every circumstance their plan was to go around me in ways that were intimidating and felt harassing. To be interim director and be faced with such blatant disregard for public library philosophy and board protocol was unreasonably stressful and a hostile environment.”

Furman’s resignation sparked an overwhelming public response, with community members writing letters to the editor and contacting trustees with their concerns.

“We can lament the loss of qualified and passionate employees, but employees don’t get to dictate to their bosses how to run a company or an organization,” Adams wrote in a response to a community member. “Unfortunately, I think this is what has gone on for many years, and the end result is they’re used to running the show unfettered and resent actually having to follow the real chain of command.”

The board’s actions complicated its months-long search for a new director.

“In complete transparency, the feedback so far has been pretty negative,” a representative from the firm hired to conduct the search for a new library director told the board in October. “Usually I get a flurry of interested applicants upon launching the recruitment, but I have yet to receive one follow-up from anyone.”

“The board is truly out of touch with what a qualified library professional is worth,” wrote one potential candidate contacted by the hiring firm. “Keep me in mind if you
come across any other director vacancies at libraries where boards value their employees.”

The search ended with 11 prospective applicants; however, all applicants who held an MLS or equivalent degree later withdrew or were eliminated.

On Dec. 10, 2021, the hiring committee, which included trustees Roedel and Ingram, as well as ImagineIF Library Foundation board member Susan Burch, was scheduled to interview several candidates. In the week leading up to the interview, five of the six candidates rated highest by the hiring firm withdrew their names from consideration. Neither of the eventual finalists made the initial cut for an interview and were considered unqualified by the screening committee. However, both were added to the interview pool along with two other passed-over candidates in order to continue moving forward.

“This is a failed search,” Burch wrote in an email. “To conduct interviews with four individuals that we already decided were not qualified is a mistake. Scraping through rejected applicants is not the kind of director search our award-winning libraries deserve.”

Ingram and Roedel agreed in emails that the candidates were not competitive and did not have the desired qualities, but the committee moved forward with the interviews.

After the full trustee board interviewed three finalist candidates, they invited two of them for site visits in January, after which the board hired Ashley Cummins, despite the concerns of senior staff, the foundation director and the majority of public comment. Trustees Adams, Ingram and Roedel have all said that bringing on a director in a timely manner was a better option than spending time and money on another search that wouldn’t guarantee a more qualified candidate.

The vote to hire Cummins as the new director was a 3-2 decision, with Lestiko and Sultz voting in opposition. Stapp, the state librarian, says hiring a director without reaching a consensus is not recommended, and the “process of trying to reach consensus is almost more important than outcome of the final decision.”
Due to Cummins not holding an MLS degree, ImagineIF will no longer qualify as a certified library by the Montana State Library under the Administrative Rules of Montana (ARM) that state that the director of a library serving more than 25,000 people must have “a graduate degree in library or information science, or its equivalent.”

During the board meeting, Stapp explained the consequence of the decision to the trustees. When board chair Roedel asked if a hardship waiver could be obtained to keep the funding intact, Stapp responded that it was public record that the trustees were making the decision in full knowledge of the consequences. “The library will miss out on that state aid,” Stapp said.

Brodehl, who as a county commissioner oversees the library's budget, disagrees with this interpretation of the law and said he has spoken to both Stapp and the governor’s office, asking them to reach out to MSL for clarification.

“The director of any agency doesn’t work in a silo,” Brodehl said. “We already have two staff that have their master’s in library science. If you take a cumulative look at the director and add in the components of the great staff we have, I believe the state library director has the authority to use that leadership group as an equivalent for the standard. That’s money that was appropriated by the state legislature to be spent in local libraries.”

The state aid funding is appropriated by the Montana Legislature to the State Library Commission for distribution; however, ARM regulates how it is distributed to the certified libraries.

“ARM does not give the state librarian the authority to make equivalency exceptions,” Stapp wrote in an email. “That other staff may hold similar degrees does not meet the standard and there is no allowance for this exception in ARM.”
Overboard

The Jan. 6 meeting to discuss hiring the new director began with the three trustees initially denying senior librarian Sean Anderson and ImagineIF Foundation Director Charlotte Housel a seat at the table with the board members, defying years of standard meeting procedure.

After the meeting ended, an emotional Anderson and equally upset Housel unloaded on trustees over months of poor behavior and decision making.

“IT IS DEMORALIZING TO STAFF. IT IS, WHETHER YOU WANT TO BELIEVE IT OR NOT,” Anderson said. “I AM WORKING WITH THESE PEOPLE AND COMMUNICATING WITH THESE PEOPLE. IT IS DAMAGING TO US.”

“You say ‘to my knowledge none of the staff have quit because of any of my actions,’ like you’re challenging them. Do you really want that? That’s an ugly, ugly exchange
that will make it hard to hire anyone,” Housel said to Adams. “It’s been said by three out of four senior staff members who left in the last year.”

“I reject that opinion,” Adams responded.

Anderson pointed to staff reports by Behe, the former director, and Furman, the former interim director, as well as former children’s librarian Ellie Newell, all three of whom explicitly cited problems with the board.

“How much more documentation do you need?” Anderson asked. “Do you need it in the public sphere? Do you need it in a letter to the editor detailing why the board is running directors and leadership out of the library? Because that does not help staff, that does not help the library, that does not help the foundation carry out a capital campaign.”

“I agree with you that it’s not working,” Adams said. “From my perspective I see both foundation and staff as utterly unwilling to work with us, and that’s where it went with [interim director] Martha.”

Board chair Roedel has expressed similar sentiments about library personnel’s unwillingness to work with the board. In a text thread obtained by the Beacon, Roedel pressed the county’s human resources director about options to temporarily close the library and lay off the entire staff.

Asked about the conversation, Roedel said she posed the question as a worst-case hypothetical about whether the library could function without a director.

“I didn’t want to go in that direction, but I’m going to ask that question,” Roedel said. “Certainly, I would not want any more staff to quit. I’m totally impressed that we can go as long as we have without a director and it’s because the staff knows their jobs so well. I might have just been having a bad day.”

For ImagineIF staff, the trustees’ sentiment underscores what they already view as the board’s lack of support.

“You keep saying, help the board, help the board,” Housel told Adams at last month’s meeting. “I want the board to help the library and the foundation to solve some of these issues.”
“It sounds like the only solution is for the board to do what they’re told to do by the foundation and staff,” Adams responded. “I would submit to you that for the past 15 years that is exactly what has happened. So the first time that you have a board that actually says ‘let’s go this direction’ it’s met with nothing but resistance.”

For Anderson, the library’s reputation has been built on a record of cooperation and trust between staff and the trustees — a trust that has been damaged.

“There’s plaques on the walls for trustee of the year,” Anderson responded. “The state trustee award is named after an ImagineIF trustee specifically because this board historically has worked in very, very close collaboration with library staff and with the foundation and that is broken now.”

Stay Connected with the Daily Roundup.

Sign up for our newsletter and get the best of the Beacon delivered every day to your inbox.
Public Library Financial Management

What’s New and Tour of the 2021 Guide

Presented by
Alan D. Panter, CPA, CGFM

February 8, 2022
Agenda

• Overview of the new LOM Financial Management Guide

• What’s New?

• Tour of the Guide

• Questions
Overview of The Guide

- Located on Library of Michigan’s website
- Release Date
- Recorded webinars also available
- 2021 is an update not a complete revision
  - Previously Revised in 2019
Overview of The Guide

- 11 Chapters
  - Starts with very basic information and builds into more complex topics
- 7 Appendices
- Glossary – clickable
- Navigation aids throughout
What’s New?

• Minor changes throughout the Guide
• Depreciation of Library materials
• Overhauled discussion on Fund Balance/Policy
• Change to ACFR
• AL not CFDA
• New discussion on Uniform Chart of Accounts
• Expanded State Compliance checklist
• Added resources in several areas
Tour of the Guide
Accounting for Libraries – Chapter 1

• Introduction to Library Accounting
  • Library Types
  • Purpose and Function of Accounting
• Governmental Accounting Standards
• Basis of Accounting
• Fund Accounting
• Types of Accounting Transactions
• Double Entry Accounting and Journal Entries
• Annual Financial Statements
• Accounting Software
• Resources
Assets and Deferred Outflows of Resources – Chapter 2

• Assets
  • Significant change with depreciation of Library materials, effective June 30, 2023

• Deferred Outflows of Resources

• Related Policies and Requirements
  • Investment Policy
  • Capital Asset Policy

• Resources
Liabilities and Deferred Inflows of Resources – Chapter 3

- Liabilities
- Deferred Inflows of Resources
- Pension and OPEB
- Related Policies and Requirements
  - Long-term Debt
  - Compensated Absences Policy
- Resources
Fund Balance / Net Position – Chapter 4

- Introduction to Fund Balance / Net Position
- Determining Appropriate Levels of Fund Balance
- Fund Balance Policy
- Special Considerations
  - Fiscal Year and Tax Year
  - Fund Balance Deficits
- Resources
Revenues and Expenditures – Chapter 5

• Revenues
• Expenditures
• Other Financing Sources and Uses (New)
• Resources
Budgeting – Chapter 6

- Budget Concepts
  - Budget Act
- Budget Process
- Level of Budgetary Control
- Budget Requirements
  - Uniform Budget Manual for Local Units of Governments in Michigan
- Budget Timeline
- Budgetary Basis
- Resources
Financial Reporting – Chapter 7

• Objectives of Financial Reporting
• Internal Reporting
  • Content and format is optional
  • Used by management
• External Reporting
  • Content and format is set by GAAP or Treasury
  • Required reporting
  • Optional reporting
• Resources
The Audit Process – Chapter 8

• Difference Between an Audit and Accounting
• Audit Requirements
• Types of Audits and Other Services
• Types of Audit Opinions
• Selection of an Independent Auditor
• Preparation for an Audit
• Resources
Grants and Federal Audit Requirements – Chapter 9

• Overview of Grants

• Library of Michigan Grants

• Federal Audit Requirements (Single Audit)

• Resources
Internal Controls – Chapter 10

• Introduction to Internal Controls
• Internal Control Objectives, Components, and Principles
• Inherent Limitations of Internal Controls
• Common Indicators of Potential Fraud or Embezzlement
• Other Related Internal Control Policies
• Resources
State Compliance – Chapter 11

• Reporting Requirements
• Policy Requirements
• Other Requirements
• Compliance Checklist
• Resources
Appendices

• App 1 – Examples of Internal Reports
• App 2 – Examples of External Reports
• App 3 – Sample Policies
• App 4 – Sample Budget
• App 5 – Sample RFP for Audit Services
• App 6 – Sample SEFA
• App 7 – Internal Control Questionnaires
Glossary

- Comprehensive glossary included
- Clickable links back to various areas where terms are discussed
Questions?
The information provided is a general summary and is being distributed with the understanding that Yeo & Yeo, P.C. is not rendering tax, accounting, legal or other professional services advice or opinions on specific facts or matters and, accordingly, assumes no liability in connection with its use. The information is not intended to be used as a basis for any decision or action that may affect your business, organization or situation. Consult a qualified professional advisor before making any such decisions.

Copyright © 2019 Yeo & Yeo, P.C.
Thank you!

Alan D. Panter, CPA, CGFM
alapan@yeoandyeo.com
248-239-0900
### Segregation of Duties – Three people

<table>
<thead>
<tr>
<th>Accounting Staff</th>
<th>Executive Director</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Write checks</td>
<td>- Sign important contracts</td>
</tr>
<tr>
<td>- Reconcile bank statement</td>
<td>- Make compensation adjustments</td>
</tr>
<tr>
<td>- Record credit/debits</td>
<td>- Sign checks</td>
</tr>
<tr>
<td>- Reconcile petty cash</td>
<td>- Complete deposit slips</td>
</tr>
<tr>
<td>- Distribute payroll</td>
<td>- Perform interbank transfers</td>
</tr>
<tr>
<td>- Sign checks</td>
<td>- Perform analytical procedures</td>
</tr>
<tr>
<td></td>
<td>- Review bank reconciliation</td>
</tr>
<tr>
<td></td>
<td>- Review wire/ACH transaction</td>
</tr>
<tr>
<td></td>
<td>- Review account activity</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accountant / other*</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Approve payroll</td>
</tr>
<tr>
<td>- Process vendor invoices</td>
</tr>
<tr>
<td>- Mail checks</td>
</tr>
<tr>
<td>- Perform analytical procedures</td>
</tr>
<tr>
<td>- Approve invoices for payment</td>
</tr>
<tr>
<td>- Disburse petty cash</td>
</tr>
<tr>
<td>- Open mail and log cash</td>
</tr>
<tr>
<td>- Receive bank statements</td>
</tr>
</tbody>
</table>

*Non accounting personnel such as a receptionist, administrative personnel etc can be trained to perform some of the less technical duties.
<table>
<thead>
<tr>
<th>Director</th>
<th>Finance Specialist</th>
<th>Bookkeeper (Jessica)</th>
<th>Administrative Assistant (HR/finance duties)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign Important Contracts</td>
<td>Reconcile bank/investment statements</td>
<td>process vendor invoices</td>
<td>Post job openings, collects applications, schedules interviews for potential new employees</td>
</tr>
<tr>
<td>Make compensation adjustments</td>
<td>record credit/debits</td>
<td>print and mail checks</td>
<td>coordinating employee paperwork/benefits</td>
</tr>
<tr>
<td>sign checks</td>
<td>distribute and reconcile petty cash</td>
<td>open mail and log cash</td>
<td>Onboards new employees</td>
</tr>
<tr>
<td>perform analytical procedures</td>
<td>perform interbank transfers</td>
<td>receive and open bank statements</td>
<td>Registers new employees for benefits</td>
</tr>
<tr>
<td>review bank reconciliation</td>
<td>Distribute payroll</td>
<td>make deposits</td>
<td>coordinates and maintains all insurance programs and policies for staff</td>
</tr>
<tr>
<td>review wire/ACH transaction</td>
<td>tracks employee paid time off accruals and usage</td>
<td>Assists with payroll</td>
<td>terminates employees and related benefits at time of termination</td>
</tr>
<tr>
<td>review account activity</td>
<td>manages all data in accounting system</td>
<td>tracks fixed assets and</td>
<td>Compiles State Aid and other statistical reports</td>
</tr>
<tr>
<td>approve vendor invoices</td>
<td>prepares monthly financial reports to be included in board packet</td>
<td>communicates with presenters/vendors about contracts, maintains vendor database</td>
<td>Tracks and acknowledges library donations</td>
</tr>
<tr>
<td>authorize invoices for payment</td>
<td>prepares invoices to be paid</td>
<td>manages w-9 forms, and sends out end of year 1099 forms</td>
<td>orders office and program supplies</td>
</tr>
<tr>
<td>authorize check request</td>
<td>reconciles financial transactions: cash, checks and cc</td>
<td>tracks Friends Funding Request forms and sends monthly report to the Friends</td>
<td>calculates tax levy and millage rate, prepares budget resolution</td>
</tr>
<tr>
<td>authorize purchase orders</td>
<td>prepares for annual financial audit</td>
<td>Assist Finance Specialist and Administrative Assistant</td>
<td></td>
</tr>
<tr>
<td>approve payroll</td>
<td>initiates investment excess library funds</td>
<td></td>
<td></td>
</tr>
<tr>
<td>review petty cash</td>
<td>manages financials for OCHR and VEBA accounts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>discuss matters with the board</td>
<td>quarterly statements for the Friends</td>
<td></td>
<td></td>
</tr>
<tr>
<td>authorize investment of excess library funds</td>
<td>Processes monthly pension and 457 contributions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Business Credit Card Change Request Form

**SECTION 1. Select one or more of the following (please refer to the instructions on the back of this form):**

- [ ] Add Cardholder
- [ ] Close Card
- [ ] Add/Remove/Replace Account Administrator
- [ ] Reopen Account
- [ ] Change/Correct Company Name
- [ ] Change/Correct Tax ID
- [ ] Company Credit Limit Increase ($________ - desired credit limit)
- [ ] Company Credit Limit Decrease ($________ - desired credit limit)

**SECTION 2. Company Information**

<table>
<thead>
<tr>
<th>Company Legal Name</th>
<th>Tax ID Number</th>
<th>Company Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company Address (No P.O. Boxes allowed)</th>
<th>Suite, Apt., Building, etc.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>ZIP Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gross Annual Sales</th>
<th>Source of Sales</th>
<th>Full Company Credit Card Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SECTION 3. Authorized Officer Information**

<table>
<thead>
<tr>
<th>First Name</th>
<th>M.I.</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Social Security Number</th>
<th>Date of Birth (MM/DD/YYYY)</th>
<th>Home Phone Number</th>
<th>Alternate Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>ZIP Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Monthly Income</th>
<th>Source of Income</th>
<th>Monthly Other Income</th>
<th>Source of Other Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
<td></td>
<td>$</td>
<td></td>
</tr>
</tbody>
</table>

*(Alimony, child support or separate maintenance payments need not be revealed if you do not wish to have it considered as a basis for this request)*

<table>
<thead>
<tr>
<th>Rent</th>
<th>Own</th>
<th>Other</th>
<th>Monthly Mortgage/Rental Amount: $</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SECTION 4. Add Cardholder/Close Card (Use additional sheets as needed)**

<table>
<thead>
<tr>
<th>Name of Cardholder</th>
<th>Last 4 Digits of Social Security Number</th>
<th>Cardholder Spending Limit Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of Cardholder</th>
<th>Last 4 Digits of Social Security Number</th>
<th>Cardholder Spending Limit Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SECTION 5. Add/Remove/Replace Account Administrator**

<table>
<thead>
<tr>
<th>Current Account Administrator Name</th>
<th>New Account Administrator Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add</th>
<th>Remove</th>
<th>Replace</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SECTION 6. Signature - MUST BE SIGNED, NO TELEPHONE AUTHORIZATIONS**

If Authorized Officer: I, the Authorized Officer, represent and warrant to PNC Bank that I am duly authorized to execute and deliver this Business Credit Card Change Request Form and any other documents, including the Certification Regarding Beneficial Owners of Legal Entity Customers form, on behalf of the Company, and that all necessary action to authorize the execution and delivery of this form and any other required documents has been properly taken. Both the Company and I will continue to be jointly and severally liable for all transactions on the credit card account, which means that I continue to be personally liable for all amounts due on the business credit card account.

If the Company has requested a credit limit increase, I authorize PNC Bank, on behalf of the Company and of myself, to obtain information from others concerning the Company’s and my respective credit standings and other relevant information impacting this request, from time to time throughout the term of the indebtedness, including obtaining credit reports on the Company and me, and file copies of financial statements from any accountant or accounting firm.

If Account Administrator: I, the Account Administrator, represent and warrant to PNC Bank that I am duly authorized to execute and deliver this Business Credit Card Change Request Form and any other documents, as necessary, on behalf of the Company, and that all necessary action to authorize the execution of this form and any other documents has been taken.

**X**

Signature

Name and Title (please print)

Date

Return a signed, completed form and certification form, as applicable, to 1-888-455-4402 (fax)

If you prefer to email the forms, please first send an email to us at businesscardunderwriting@pnc.com and request a secure email message.

**Please do not send any completed forms directly to the above email address without FIRST receiving a secure email from us.**

For Bank Use Only – From:  

Phone Number: ( ) -

See Reverse for Instructions
Business Credit Card Change Request Form

INSTRUCTIONS

The Business Credit Card Change Request form must be completed as provided below, signed by the Authorized Officer on the business credit card account, and emailed or faxed to PNC Bank using the information at the bottom of the form. If you would prefer to email, please first send an email to us at businesscardunderwriting@pnc.com and request that we send you a secure email message. Please do not send any complete forms directly to us without FIRST receiving a secure email from us. Any information that is incomplete or illegible may cause a delay in processing your request. Depending on the request made, you may also be required to complete, sign and submit a Certification Regarding Beneficial Owners of Legal Entity Customers form which is available in Online Banking.

Add Cardholder – To have a credit card issued to a Company employee, please complete the following sections:

Section 1 – Check the Add Cardholder box.
Section 2 – Provide the Company’s legal name, tax identification number or social security number (for sole proprietors), phone number, address, and the 16 digits for the Company’s credit card account.
Section 3 – Provide the name of the Authorized Officer.
Section 4 – Provide the name of the Company employee, last four digits of that employee’s social security number, and specify the spending limit, up to the Company's maximum credit limit, for the credit card to be issued to the named employee.
Section 6 – The Authorized Officer listed in Section 3 or the Account Administrator must sign, print name and title, and date the form.

Close Card – To have an existing Company employee’s credit card closed, please complete the following sections:

Section 1 – Check the Close Card box.
Section 2 – Provide the Company’s legal name, tax identification number or social security number (for sole proprietors), phone number, address, and the 16 digits for the Company’s credit card account.
Section 3 – Provide the name of the Authorized Officer.
Section 4 – Provide the name of the Company employee to be removed and the last four digits of that employee’s social security number.
Section 6 – The Authorized Officer listed in Section 3 or the Account Administrator must sign, print name and title, and date the form.

Add/Remove/Replace Account Administrator – To add, remove or replace an Account Administrator (a Company employee who has been granted authority by the Company to manage the credit card account on behalf of the Company), please complete the following sections:

Section 1 – Check the Add/Remove/Replace Account Administrator box.
Section 2 – Provide the Company’s legal name, tax identification number or social security number (for sole proprietors), phone number, address, and the 16 digits for the Company’s credit card account.
Section 3 – Provide the name of the Authorized Officer.
Section 5 – Select either Add, Remove or Replace. If adding a new Account Administrator, provide the name of the current Account Administrator (if applicable) and the name of the new Account Administrator. If removing a current Account Administrator, provide the name of the current Account Administrator to be removed. If replacing the designated Account Administrator with a new Account Administrator, provide both the name of the current Account Administrator and the name of the new Account Administrator.
Section 6 – The Authorized Officer listed in Section 3 must sign, print name and title, and date the form.

Reopen Account – To reopen the Company’s credit card account that has been closed greater than 30 days, please complete the following sections:

Section 1 – Check the Reopen Account box.
Section 2 – Provide the Company’s legal name, tax identification number or social security number (for sole proprietors), phone number, address, and the 16 digits for the Company’s credit card account.
Section 3 – Complete this section in its entirety.
Section 6 – The Authorized Officer listed in Section 3 must sign, print name and title, and date the form.

Change/Correct Company Name – To change or correct the Company’s Legal Name, please complete the following sections:

Section 1 – Check the Change/Correct Company Name box.
Section 2 – Provide the Company’s legal name, tax identification number or social security number (for sole proprietors), phone number, address, and the 16 digits for the Company’s credit card account.
Section 3 – Provide the name of the Authorized Officer.
Section 5 – Complete this section in its entirety.
Section 6 – The Authorized Officer listed in Section 3 must sign, print name and title, and date the form.
Certification Regarding Beneficial Owners of Legal Entity Customers form – Complete, sign, and return along with the Business Credit Card Change Request form.
Also provide any supporting documents to reflect why the Company’s legal name on the credit card account needs changed/corrected.

Change/Correct Tax ID – To change or correct the Company’s Tax ID, please complete the following sections:

Section 1 – Check the Change/Correct Tax ID box.
Section 2 – Provide the Company’s legal name, tax identification number or social security number (for sole proprietors), phone number, address, and the 16 digits for the Company’s credit card account.
Section 3 – Provide the name of the Authorized Officer.
Section 6 – The Authorized Officer listed in Section 3 must sign, print name and title, and date the form.
Also provide a copy of the SS-4 which reflects the changed/corrected Company tax identification number.

Company Credit Limit Increase – To request an increase to the Company’s credit limit for the credit card account, please complete the following sections:

Section 1 – Check the Company Credit Limit Increase box and insert the requested limit desired.
Section 2 – Provide the Company’s legal name, tax identification number or social security number (for sole proprietors), phone number, address, gross annual sales, source of sales, and the 16 digits for the Company’s credit card account.
Section 3 – Complete this section in its entirety.
Section 6 – The Authorized Officer listed in Section 3 must sign, print name and title, and date the form.
Certification Regarding Beneficial Owners of Legal Entity Customers form – Complete, sign, and return along with the Business Credit Card Change Request form.

NOTE: To request an increase to the spending limit for an employee’s card, do not use this form. Please contact Customer Care at 800-474-2101.

Company Credit Limit Decrease – To request a decrease to the Company’s credit limit for the credit card account, please complete the following sections:

Section 1 – Check the Company Credit Limit Decrease box and insert the requested limit desired.
Section 2 – Provide the Company’s legal name, tax identification number or social security number (for sole proprietors), phone number, address, and the 16 digits for the Company’s credit card account.
Section 3 – Provide the name of the Authorized Officer.
Section 6 – The Authorized Officer listed in Section 3 must sign, print name and title, and date the form.

NOTE: To request a decrease to the spending limit for an employee’s card, do not use this form. Please contact Customer Care at 800-474-2101.