

NORTHBROOK PUBLIC LIBRARY BOARD MEETING

January 15, 2026 | 7:00 p.m.

Northbrook Public Library | Civic Room

Regular Monthly Meeting Agenda

- 1 Call Regular Meeting to Order – Ms. Stacy Oliver
- 2 Board of Trustees Roll Call – Ms. Jennifer McGee
- 3 Consent Agenda – Ms. Stacy Oliver
 - 3.1 Approval of the Agenda
 - 3.2 Approve Regular Session Minutes – November 20, 2025
 - 3.3 Approve Cash Balances & Income Statement November
 - 3.4 Approve Cash Balances & Income Statement December
 - 3.5 Approve Bills and Charges from November 2025 in the amount of \$1,988,620.48
 - 3.6 Approve Bills and Charges from December 2025 in the amount of \$725,606.95
- 4 Public Comments
- 5 Staff Reports – Ms. Kate Hall
- 6 Board Member Reports
- 7 Unfinished Business
 - 7.1 Health Insurance Benefits Proposal
- 8 New Business
 - 8.1 EDI Survey Report Presentation- Lily Zheng
 - 8.2 Master Plan Timeline & Next Steps
 - 8.3 Third Way Space Evaluation Proposal
 - 8.4 Auditor Proposal FY26 to FY30
 - 8.5 Quarterly Strategic Plan Check In
 - 8.6 Class 6b Request for 2525 Shermer Road
 - 8.7 Director Evaluation Process Review
- 9 Closed Session

pursuant to 5 ILCS 120/2(c)1: the appointment, employment, compensation, discipline, performance, or dismissal of specific employees of the public body or legal counsel for the public body including hearing testimony on a complaint lodged against an employee of the public body or against legal counsel for the public body to determine its validity.
- 10 Agenda Building

11 Adjourn

FINAL VOTE OR ACTION MAY BE TAKEN AT THE MEETING ON ANY AGENDA ITEM SUBJECT MATTER LISTED ABOVE, UNLESS THE AGENDA LINE ITEM SPECIFICALLY STATES OTHERWISE.

The Northbrook Public Library is subject to the Requirements of the Americans with Disabilities Act of 1990. Individuals with disabilities who plan to attend any meetings of the Board and who require certain accommodations in order to allow them to observe and/or participate in this meeting, or who have questions regarding the accessibility of these meetings or the facilities are requested contact 847-272-7074 promptly to allow the Northbrook Public Library to make reasonable accommodations for those persons. Hearing impaired individuals may establish TDD contact by calling 847-272-7074.

NORTHBROOK PUBLIC LIBRARY

CASH BALANCES

11/30/2025

	Beginning Balance	Cash Receipts	Expenditures	Ending Balance
Operating				
General	5,409,684.05	126,626.60	1,319,247.27	4,217,063.38
Restricted	374,243.00	9,646.17	4,661.14	379,228.03
IMRF	765,833.06		56,125.82	709,707.24
FICA	3,117.40			3,117.40
Total Operating	<u>\$ 6,552,877.51</u>	<u>\$ 136,272.77</u>	<u>\$1,380,034.23</u>	<u>\$ 5,309,116.05</u>
Capital Improvement	\$ 7,601,508.56	\$ 2,780.51	\$ 1,086.25	\$ 7,603,202.82
Debt Service	\$ 4,053.68	\$ 604,000.00	\$ 607,500.00	\$ 553.68

Cash Detail	Operating	Capital Improvement	Debt Service
NB&T - Checking	291,808.16	53,863.34	553.68
PayPal	5,346.27	-	-
First Bank of Chicago	257,600.19	-	-
Fifth Third - Checking/Money Market	4,740,563.46	7,548,740.09	-
US Bancorp	13,186.20	599.39	-
INB	136.77	-	-
Petty Cash	475.00	-	-
Total	<u>\$ 5,309,116.05</u>	<u>\$7,603,202.82</u>	<u>\$ 553.68</u>

NB&T = Northbrook Bank & Trust

Northbrook Public Library
Income Statement
November 2025

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	58%
01 - General Operating Fund						
Revenues						
Undesignated Revenue						
Property Tax Levy	\$0.00	\$0.00	\$8,270,430.96	\$4,594,211.72	\$8,869,000.00	51.80%
Replacement Tax	\$0.00	\$112,484.67	\$105,615.39	\$112,484.67	\$150,000.00	74.99%
Impact Fees	\$0.00	\$4,799.80	\$0.00	\$7,919.67	\$0.00	0.00%
Fines, Fees & Rentals	\$2,031.90	\$2,651.92	\$32,291.70	\$31,752.06	\$40,000.00	79.38%
Interest Income	\$4,685.71	\$1,657.22	\$41,578.20	\$21,906.87	\$30,000.00	73.02%
Other Income	\$1,228.22	\$1,108.90	\$8,396.09	\$3,597.66	\$100,000.00	3.60%
Total Undesignated Revenue	\$7,945.83	\$122,702.51	\$8,458,312.34	\$4,771,872.65	\$9,189,000.00	51.93%
Designated Revenue						
Gifts & Other Designated Income	\$563.11	\$8,806.95	\$683,989.36	\$809,163.73	\$100,000.00	809.16%
Designated Interest Income	\$842.93	\$839.22	\$6,580.46	\$5,422.77	\$5,000.00	108.46%
Total Designated Revenue	\$1,406.04	\$9,646.17	\$690,569.82	\$814,586.50	\$105,000.00	775.80%
Total Revenues	\$9,351.87	\$132,348.68	\$9,148,882.16	\$5,586,459.15	\$9,294,000.00	60.11%
Expenses						
Undesignated Expenses						
Materials & Services						
Books	\$77,121.04	\$90,595.33	\$571,210.96	\$582,401.69	\$1,050,000.00	55.47%
Audio Visual	\$67,045.05	\$80,124.42	\$515,073.85	\$532,956.06		
Videos/DVDs	\$3,942.08	\$4,635.96	\$22,831.27	\$22,239.44		
Programs	\$6,133.91	\$5,834.95	\$33,305.84	\$27,184.19		
OCLC	\$3,547.14	\$8,076.81	\$51,065.22	\$73,275.07	\$124,000.00	59.09%
CCS Shared Costs	\$27.78	\$592.72	\$16,566.84	\$16,538.87	\$29,000.00	57.03%
Total Materials & Services	\$0.00	\$0.00	\$47,686.36	\$47,396.97	\$76,000.00	62.36%
Total Materials & Services	\$80,695.96	\$99,264.86	\$686,529.38	\$719,612.60	\$1,279,000.00	56.26%
Human Resources						
General Salaries and Wages	\$349,562.42	\$360,033.32	\$2,554,697.30	\$2,490,235.49	\$4,740,000.00	52.54%
Maintenance Salaries & Wages	\$10,327.39	\$7,837.44	\$102,968.55	\$60,383.50	\$103,000.00	58.62%
Group Insurance	\$59,306.14	\$72,176.60	\$436,381.14	\$474,372.78	\$880,000.00	53.91%
Unemployment/Worker's Comp	\$0.00	\$0.00	\$19,086.81	\$13,190.15	\$18,000.00	73.28%
Staff Development	\$7,158.56	\$5,951.58	\$71,538.03	\$50,264.75	\$74,000.00	67.93%
Total Human Resources	\$426,354.51	\$445,998.94	\$3,184,671.83	\$3,088,446.67	\$5,815,000.00	53.11%

Northbrook Public Library
Income Statement
November 2025

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	58%
Operating Costs						
Photocopy	\$109.05	\$555.40	\$14,699.58	\$10,600.08	\$18,000.00	58.89%
Office & Library Supplies	\$1,631.78	\$9,983.01	\$29,591.65	\$29,595.41	\$70,000.00	42.28%
Software	\$8,208.68	\$1,076.36	\$84,668.11	\$74,839.36	\$110,000.00	68.04%
Postage	\$61.31	\$0.00	\$15,875.23	\$15,687.26	\$20,000.00	78.44%
General Insurance	\$7,017.00	\$8,227.00	\$74,541.20	\$78,703.06	\$88,000.00	89.44%
Telephone/Internet	\$11,626.68	\$12,027.42	\$30,022.72	\$30,071.16	\$40,000.00	75.18%
Professional Services	\$54,361.47	\$66,222.26	\$272,165.32	\$372,263.20	\$630,000.00	59.09%
Furniture, Equipment	\$0.00	\$22,310.75	\$8,895.71	\$45,013.33	\$75,000.00	60.02%
Equipment Rental & Maintenance	\$1,877.54	\$518.04	\$33,971.13	\$36,473.30	\$53,000.00	68.82%
Community Relations	\$9,213.94	\$10,063.94	\$30,895.69	\$46,946.71	\$55,000.00	85.36%
Total Operating Costs	\$94,107.45	\$130,984.18	\$595,326.34	\$740,192.87	\$1,159,000.00	63.86%
Maintenance						
Vehicle Expense	\$64.34	\$82.51	\$1,912.82	\$1,598.97	\$3,000.00	53.30%
Janitorial Supplies	\$3,217.22	\$5,134.67	\$20,136.81	\$25,396.05	\$45,000.00	56.44%
Utilities	\$4,898.70	\$5,675.89	\$20,585.10	\$26,938.14	\$60,000.00	44.90%
Building Repairs	\$2,240.00	\$8,528.00	\$10,828.95	\$21,226.00	\$35,000.00	60.65%
Contracted Services	\$10,938.31	\$3,318.61	\$122,303.87	\$146,968.06	\$245,000.00	59.99%
Total Maintenance	\$21,358.57	\$22,739.68	\$175,767.55	\$222,127.22	\$388,000.00	57.25%
Other Expenses						
Recruiting	\$150.00	\$0.00	\$250.00	\$825.50	\$1,000.00	82.55%
Contingency & Misc Exp	\$439.21	\$1,073.01	\$5,670.10	\$9,071.56	\$100,000.00	9.07%
Board Development	\$110.00	\$330.00	\$446.57	\$1,502.93	\$1,000.00	150.29%
Total Other Expenses	\$699.21	\$1,403.01	\$6,366.67	\$11,399.99	\$102,000.00	11.18%
Total Undesignated Expenses	\$623,215.70	\$700,390.67	\$4,648,661.77	\$4,781,779.35	\$8,743,000.00	54.69%
Designated Expenses						
Miscellaneous Designated Expenses	\$15,644.20	\$1,485.73	\$601,423.07	\$705,713.34	\$100,000.00	705.71%
Designated Materials Expense	\$596.00	\$132.48	\$1,185.93	\$132.48	\$0.00	0.00%
Designated Capital Expense	\$0.00	\$0.00	\$0.00	\$2,500.00	\$0.00	0.00%
Designated Program Expense	\$619.88	\$3,042.93	\$52,735.52	\$55,911.50	\$0.00	0.00%
Total Designated Expenses	\$16,860.08	\$4,661.14	\$655,344.52	\$764,257.32	\$100,000.00	764.26%
Transfers & Other Financing Uses						
Transfer to CIF	\$0.00	\$0.00	\$0.00	\$0.00	\$425,000.00	0.00%
Transfer to Debt Service	\$0.00	\$0.00	\$0.00	\$0.00	\$25,000.00	0.00%
Total Transfers & Other Financing Uses	\$0.00	\$0.00	\$0.00	\$0.00	\$450,000.00	0.00%
Total Expenses	\$640,075.78	\$705,051.81	\$5,304,006.29	\$5,546,036.67	\$9,293,000.00	59.68%
NET SURPLUS/(DEFICIT)	(\$630,723.91)	(\$572,703.13)	\$3,844,875.87	\$40,422.48	\$1,000.00	

Northbrook Public Library
Income Statement
November 2025

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	58%
02 - IMRF/FICA Fund						
Revenues						
Undesignated Revenue						
Property Tax Levy-IMRF	\$0.00	\$0.00	\$391,644.30	\$196,842.99	\$380,000.00	51.80%
Property Tax Levy FICA	\$0.00	\$0.00	\$274,151.02	\$168,352.41	\$325,000.00	51.80%
Interest Income IMRF	\$0.00	\$0.00	\$255.16	\$0.00	\$2,000.00	0.00%
Interest Income FICA	\$0.00	\$0.00	\$178.61	\$0.00	\$500.00	0.00%
Total Undesignated Revenue	\$0.00	\$0.00	\$666,229.09	\$365,195.40	\$707,500.00	51.62%
Total Revenues	\$0.00	\$0.00	\$666,229.09	\$365,195.40	\$707,500.00	51.62%
Expenses						
Undesignated Expenses						
Human Resources						
Employer IMRF	\$27,400.93	\$29,063.88	\$204,133.30	\$211,094.19	\$365,000.00	57.83%
Employer FICA	\$26,652.25	\$27,061.94	\$197,035.28	\$198,323.37	\$340,000.00	58.33%
Total Human Resources	\$54,053.18	\$56,125.82	\$401,168.58	\$409,417.56	\$705,000.00	58.07%
Total Undesignated Expenses	\$54,053.18	\$56,125.82	\$401,168.58	\$409,417.56	\$705,000.00	58.07%
Total Expenses	\$54,053.18	\$56,125.82	\$401,168.58	\$409,417.56	\$705,000.00	58.07%
NET SURPLUS/(DEFICIT)	(\$54,053.18)	(\$56,125.82)	\$265,060.51	(\$44,222.16)	\$2,500.00	

Northbrook Public Library
Income Statement
November 2025

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	58%
03 - Capital Improvements Fund						
Revenues						
Undesignated Revenue						
Interest Income	\$3,328.37	\$2,780.51	\$25,397.34	\$23,034.83	\$20,000.00	115.17%
Total Undesignated Revenue	\$3,328.37	\$2,780.51	\$25,397.34	\$23,034.83	\$20,000.00	115.17%
Transfers & Other Financing Sources						
Transfer from General fund	\$0.00	\$0.00	\$0.00	\$0.00	\$425,000.00	0.00%
Total Transfers & Other Financing Sources	\$0.00	\$0.00	\$0.00	\$0.00	\$425,000.00	0.00%
Total Revenues	\$3,328.37	\$2,780.51	\$25,397.34	\$23,034.83	\$445,000.00	5.18%
Expenses						
Undesignated Expenses						
Capital Projects & Bond Expenses						
Renovation/Repair	\$17,047.99	\$0.00	\$308,320.70	\$16,586.43	\$715,000.00	2.32%
Professional Fees	\$0.00	\$1,086.25	\$2,700.00	\$1,925.00	\$50,000.00	3.85%
Furniture & Equipment	\$0.00	\$0.00	\$1,230.96	\$0.00	\$0.00	0.00%
Total Capital & Bond Expenses	\$17,047.99	\$1,086.25	\$312,251.66	\$18,511.43	\$765,000.00	2.42%
Total Undesignated Expenses	\$17,047.99	\$1,086.25	\$312,251.66	\$18,511.43	\$765,000.00	2.42%
Total Expenses	\$17,047.99	\$1,086.25	\$312,251.66	\$18,511.43	\$765,000.00	2.42%
NET SURPLUS/(DEFICIT)	(\$13,719.62)	\$1,694.26	(\$286,854.32)	\$4,523.40	(\$320,000.00)	

Northbrook Public Library
Income Statement
November 2025

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	58%
05 - Debt Service Fund						
Revenues						
Undesignated Revenue						
Property Tax Levy	\$0.00	\$0.00	\$742,508.63	\$398,866.05	\$770,000.00	51.80%
Interest Income	\$0.00	\$0.00	\$483.74	\$0.00	\$0.00	0.00%
Total Undesignated Revenue	\$0.00	\$0.00	\$742,992.37	\$398,866.05	\$770,000.00	51.80%
Total Revenues	\$0.00	\$0.00	\$742,992.37	\$398,866.05	\$770,000.00	51.80%
Expenses						
Undesignated Expenses						
Capital Projects & Bond Expenses						
Interest Payments	\$166,259.72	\$162,500.00	\$332,934.72	\$325,000.00	\$325,000.00	100.00%
Principal Payments	\$425,000.00	\$445,000.00	\$425,000.00	\$445,000.00	\$445,000.00	100.00%
Total Capital & Bond Expenses	\$591,259.72	\$607,500.00	\$757,934.72	\$770,000.00	\$770,000.00	100.00%
Total Undesignated Expenses	\$591,259.72	\$607,500.00	\$757,934.72	\$770,000.00	\$770,000.00	100.00%
Transfers & Other Financing Uses						
Other Financing Uses	\$0.00	\$0.00	\$475.00	\$0.00	\$0.00	0.00%
Total Transfers & Other Financing Uses	\$0.00	\$0.00	\$475.00	\$0.00	\$0.00	0.00%
Total Expenses	\$591,259.72	\$607,500.00	\$758,409.72	\$770,000.00	\$770,000.00	100.00%
NET SURPLUS/(DEFICIT)	(\$591,259.72)	(\$607,500.00)	(\$15,417.35)	(\$371,133.95)	\$0.00	

NOVEMBER 2025 FINANCIAL SUMMARY

As a reminder, the General Fund budget is allocated evenly across all 12 months. However, actual revenues and expenditures are recorded on a cash basis, meaning they reflect when payments are received or made. This timing difference can create variances early in the fiscal year.

Total General Fund revenues collected to date is \$5,586,459.

- **Property Taxes** – 51.80% of property taxes have been collected
 - Cook County's second installment property tax bills have been delayed due to the transition from an old mainframe to a new computer system.
 - On 11/7/25, Cook County announced that second installment property tax bills for Tax Year 2024 are expected to be mailed to property owners on November 14, 2025, with a due date of December 15, 2025.
- **Fines, Fees, and Rentals**: Actual receipts have exceeded the conservative budget estimate.
- **Interest Income**: Actual receipts have exceeded the conservative budget estimate.

Total General Fund expenditures to date are \$5,546,036.

Several expenditure categories show variances to budget, primarily due to the timing of annual or multi-month payments being recorded early in the fiscal year:

- **Unemployment/Workers Compensation**: Higher than budget as the amount recorded represents approximately 10 months of expense.
- **Office & Library Supplies**: Lower than budget due to lower spending than anticipated.
- **Postage**: Higher than budget due to the annual postage deposit being paid.
- **General Insurance**: Higher than budget as the amount recorded represents approximately 10 months of expense.
- **Telephone/Internet**: Higher than budget as the amount recorded represents 12 months of RingCentral expense.
- **Furniture, Equipment**: Lower than budget due to items not being purchased evenly throughout the year.
- **Community Relations**: Higher than budget due to the formation of a meeting room policy work group, which worked with outside consultants to ensure the community had a voice in the process.
- **Utilities**: Lower than budget due to gas costs being higher in winter months compared to summer months.
- **Building Repairs**: Lower than budget due to repairs being recorded when incurred not evenly throughout the year.
- **Recruiting**: Higher than budget due to reimbursing an out of state candidate for traveling costs.
- **Board Development**: Higher than budget due to recording membership costs to ALA and ILA for new trustees and ILA Annual Conference Registration costs.

NORTHBROOK PUBLIC LIBRARY
CASH BALANCES
12/31/2025

	Beginning Balance	Cash Receipts	Expenditures	Ending Balance
<u>Operating</u>				
General	4,217,063.38	6,970.62	668,004.03	3,556,029.97
Restricted	379,228.03	14,434.23	894.65	392,767.61
IMRF	776,334.49		29,254.51	747,079.98
FICA	(63,509.85)		27,218.76	(90,728.61)
Total Operating	<u>\$ 5,309,116.05</u>	<u>\$ 21,404.85</u>	<u>\$ 725,371.95</u>	<u>\$ 4,605,148.95</u>
<u>Capital Improvement</u>		<u>\$ 7,603,202.82</u>	<u>\$ 2,874.17</u>	<u>\$ 7,606,076.99</u>
<u>Debt Service</u>		<u>\$ 553.68</u>		<u>\$ 553.68</u>

Cash Detail	Operating	Capital	Debt Service
		Improvement	
NB&T - Checking	297,280.08	53,863.34	553.68
PayPal	6,771.12	-	-
First Bank of Chicago	258,415.02	-	-
Fifth Third - Checking/Money Market	4,028,716.69	7,551,612.26	-
US Bancorp	13,391.21	601.39	-
INB	99.83		
Petty Cash	475.00	-	-
Total	<u>\$ 4,605,148.95</u>	<u>\$ 7,606,076.99</u>	<u>\$ 553.68</u>

NB&T = Northbrook Bank & Trust

Northbrook Public Library
Income Statement
December 2025

01 - General Operating Fund	PY Month	CY Month	PY YTD	CY YTD	CY Budget	67%
Revenues						
Undesignated Revenue						
Property Tax Levy	\$0.00	\$0.00	\$8,270,430.96	\$4,594,211.72	\$8,869,000.00	51.80%
Replacement Tax	\$0.00	\$0.00	\$105,615.39	\$112,484.67	\$150,000.00	74.99%
Impact Fees	\$0.00	\$0.00	\$0.00	\$7,919.67	\$0.00	0.00%
Fines, Fees & Rentals	\$3,620.94	\$3,550.50	\$35,912.64	\$35,302.56	\$40,000.00	88.26%
Interest Income	\$4,091.05	\$1,235.86	\$45,669.25	\$23,142.73	\$30,000.00	77.14%
Other Income	\$149.45	\$277.20	\$8,545.54	\$3,874.86	\$100,000.00	3.87%
Total Undesignated Revenue	\$7,861.44	\$5,063.56	\$8,466,173.78	\$4,776,936.21	\$9,189,000.00	51.99%
Designated Revenue						
Gifts & Other Designated Income	\$30,830.03	\$13,619.40	\$714,819.39	\$822,783.13	\$100,000.00	822.78%
Designated Interest Income	\$818.54	\$814.83	\$7,399.00	\$6,237.60	\$5,000.00	124.75%
Total Designated Revenue	\$31,648.57	\$14,434.23	\$722,218.39	\$829,020.73	\$105,000.00	789.54%
Total Revenues	\$39,510.01	\$19,497.79	\$9,188,392.17	\$5,605,956.94	\$9,294,000.00	60.32%
Expenses						
Undesignated Expenses						
Materials & Services						
Books	\$34,830.51	\$40,686.34	\$606,041.47	\$622,336.11	\$1,050,000.00	59.27%
Audio Visual	\$26,480.25	\$35,643.54	\$541,554.10	\$567,951.65		
Videos/DVDs	\$3,399.54	\$1,919.73	\$26,230.81	\$24,179.17		
Programs	\$4,950.72	\$3,123.07	\$38,256.56	\$30,205.29		
OCLC	\$2,146.05	\$1,343.50	\$53,211.27	\$74,356.21	\$124,000.00	59.96%
CCS Shared Costs	\$143.08	\$0.00	\$16,709.92	\$16,538.87	\$29,000.00	57.03%
Total Materials & Services	\$37,119.64	\$42,029.84	\$723,649.02	\$760,628.16	\$1,279,000.00	59.47%
Human Resources						
General Salaries and Wages	\$352,069.18	\$363,328.24	\$2,906,766.48	\$2,853,563.73	\$4,740,000.00	60.20%
Maintenance Salaries & Wages	\$11,884.33	\$7,191.76	\$114,852.88	\$67,575.26	\$103,000.00	65.61%
Group Insurance	\$59,309.99	\$75,208.55	\$495,691.13	\$549,581.33	\$880,000.00	62.45%
Unemployment/Worker's Comp	\$0.00	\$0.00	\$19,086.81	\$13,190.15	\$18,000.00	73.28%
Staff Development	\$274.81	\$3,348.13	\$71,812.84	\$51,049.30	\$74,000.00	68.99%
Total Human Resources	\$423,538.31	\$449,076.68	\$3,608,210.14	\$3,534,959.77	\$5,815,000.00	60.79%

Northbrook Public Library
Income Statement
December 2025

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	67%
Operating Costs						
Photocopy	\$2,099.55	\$1,795.84	\$16,799.13	\$12,395.92	\$18,000.00	68.87%
Office & Library Supplies	\$1,811.46	\$1,095.77	\$31,403.11	\$30,691.18	\$70,000.00	43.84%
Software	\$7,855.57	\$11,283.99	\$92,523.68	\$81,170.54	\$110,000.00	73.79%
Postage	\$39.18	\$25.80	\$15,914.41	\$15,687.26	\$20,000.00	78.44%
General Insurance	\$0.00	\$0.00	\$74,541.20	\$78,703.06	\$88,000.00	89.44%
Telephone/Internet	\$13.78	\$19.02	\$30,036.50	\$30,071.16	\$40,000.00	75.18%
Professional Services	\$26,201.17	\$49,160.19	\$298,366.49	\$399,329.33	\$630,000.00	63.39%
Furniture, Equipment	\$1,547.08	\$1,379.41	\$10,442.79	\$45,013.33	\$75,000.00	60.02%
Equipment Rental & Maintenance	\$399.95	\$139.90	\$34,371.08	\$36,473.30	\$53,000.00	68.82%
Community Relations	\$1,761.37	\$255.00	\$32,657.06	\$46,946.71	\$55,000.00	85.36%
Total Operating Costs	\$41,729.11	\$65,154.92	\$637,055.45	\$776,481.79	\$1,159,000.00	67.00%
Maintenance						
Vehicle Expense	\$0.00	\$0.00	\$1,912.82	\$1,598.97	\$3,000.00	53.30%
Janitorial Supplies	\$1,408.69	\$6,084.16	\$21,545.50	\$31,480.21	\$45,000.00	69.96%
Utilities	\$3,255.71	\$5,415.63	\$23,840.81	\$31,583.91	\$60,000.00	52.64%
Building Repairs	\$2,849.80	\$9,334.00	\$13,678.75	\$30,560.00	\$35,000.00	87.31%
Contracted Services	\$21,800.05	\$16,051.97	\$144,103.92	\$148,499.67	\$245,000.00	60.61%
Total Maintenance	\$29,314.25	\$36,885.76	\$205,081.80	\$243,722.76	\$388,000.00	62.82%
Other Expenses						
Recruiting	\$0.00	\$0.00	\$250.00	\$825.50	\$1,000.00	82.55%
Contingency & Misc Exp	\$1,110.50	\$1,752.28	\$6,780.60	\$10,856.84	\$100,000.00	10.86%
Board Development	\$0.00	\$0.00	\$446.57	\$1,502.93	\$1,000.00	150.29%
Total Other Expenses	\$1,110.50	\$1,752.28	\$7,477.17	\$13,185.27	\$102,000.00	12.93%
Total Undesignated Expenses	\$532,811.81	\$594,899.48	\$5,181,473.58	\$5,328,977.75	\$8,743,000.00	60.95%
Designated Expenses						
Miscellaneous Designated Expenses	\$1,935.59	\$546.65	\$603,358.66	\$705,898.34	\$100,000.00	705.90%
Designated Materials Expense	\$0.00	\$0.00	\$1,185.93	\$132.48	\$0.00	0.00%
Designated Capital Expense	\$0.00	\$0.00	\$0.00	\$2,500.00	\$0.00	0.00%
Designated Program Expense	\$198.00	\$348.00	\$52,933.52	\$56,259.50	\$0.00	0.00%
Total Designated Expenses	\$2,133.59	\$894.65	\$657,478.11	\$764,790.32	\$100,000.00	764.79%
Transfers & Other Financing Uses						
Transfer to CIF	\$0.00	\$0.00	\$0.00	\$0.00	\$425,000.00	0.00%
Transfer to Debt Service	\$0.00	\$0.00	\$0.00	\$0.00	\$25,000.00	0.00%
Total Transfers & Other Financing Uses	\$0.00	\$0.00	\$0.00	\$0.00	\$450,000.00	0.00%
Total Expenses	\$534,945.40	\$595,794.13	\$5,838,951.69	\$6,093,768.07	\$9,293,000.00	65.57%
NET SURPLUS/(DEFICIT)	(\$495,435.39)	(\$576,296.34)	\$3,349,440.48	(\$487,811.13)	\$1,000.00	

Northbrook Public Library
Income Statement
December 2025

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	67%
02 - IMRF/FICA Fund						
Revenues						
Undesignated Revenue						
Property Tax Levy-IMRF	\$0.00	\$0.00	\$391,644.30	\$196,842.99	\$380,000.00	51.80%
Property Tax Levy FICA	\$0.00	\$0.00	\$274,151.02	\$168,352.41	\$325,000.00	51.80%
Interest Income IMRF	\$0.00	\$0.00	\$255.16	\$0.00	\$2,000.00	0.00%
Interest Income FICA	\$0.00	\$0.00	\$178.61	\$0.00	\$500.00	0.00%
Total Undesignated Revenue	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$666,229.09</u>	<u>\$365,195.40</u>	<u>\$707,500.00</u>	<u>51.62%</u>
Total Revenues	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$666,229.09</u>	<u>\$365,195.40</u>	<u>\$707,500.00</u>	<u>51.62%</u>
Expenses						
Undesignated Expenses						
Human Resources						
Employer IMRF	\$27,971.57	\$29,254.51	\$232,104.87	\$240,348.70	\$365,000.00	65.85%
Employer FICA	\$26,962.92	\$27,218.76	\$223,998.20	\$225,542.13	\$340,000.00	66.34%
Total Human Resources	<u>\$54,934.49</u>	<u>\$56,473.27</u>	<u>\$456,103.07</u>	<u>\$465,890.83</u>	<u>\$705,000.00</u>	<u>66.08%</u>
Total Undesignated Expenses	<u>\$54,934.49</u>	<u>\$56,473.27</u>	<u>\$456,103.07</u>	<u>\$465,890.83</u>	<u>\$705,000.00</u>	<u>66.08%</u>
Total Expenses	<u>\$54,934.49</u>	<u>\$56,473.27</u>	<u>\$456,103.07</u>	<u>\$465,890.83</u>	<u>\$705,000.00</u>	<u>66.08%</u>
NET SURPLUS/(DEFICIT)	<u>(\$54,934.49)</u>	<u>(\$56,473.27)</u>	<u>\$210,126.02</u>	<u>(\$100,695.43)</u>	<u>\$2,500.00</u>	

Northbrook Public Library
Income Statement
December 2025

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	67%
03 - Capital Improvements Fund Revenues						
Undesignated Revenue						
Interest Income	\$3,320.78	\$2,874.17	\$28,718.12	\$25,909.00	\$20,000.00	129.55%
Total Undesignated Revenue	\$3,320.78	\$2,874.17	\$28,718.12	\$25,909.00	\$20,000.00	129.55%
Transfers & Other Financing Sources						
Transfer from General fund	\$0.00	\$0.00	\$0.00	\$0.00	\$425,000.00	0.00%
Total Transfers & Other Financing Sources	\$0.00	\$0.00	\$0.00	\$0.00	\$425,000.00	0.00%
Total Revenues	\$3,320.78	\$2,874.17	\$28,718.12	\$25,909.00	\$445,000.00	5.82%
Expenses						
Undesignated Expenses						
Capital Projects & Bond Expenses						
Renovation/Repair	\$0.00	\$0.00	\$308,320.70	\$16,586.43	\$715,000.00	2.32%
Professional Fees	\$0.00	\$235.00	\$2,700.00	\$2,160.00	\$50,000.00	4.32%
Furniture & Equipment	\$0.00	\$0.00	\$1,230.96	\$0.00	\$0.00	0.00%
Total Capital & Bond Expenses	\$0.00	\$235.00	\$312,251.66	\$18,746.43	\$765,000.00	2.45%
Total Undesignated Expenses	\$0.00	\$235.00	\$312,251.66	\$18,746.43	\$765,000.00	2.45%
Total Expenses	\$0.00	\$235.00	\$312,251.66	\$18,746.43	\$765,000.00	2.45%
NET SURPLUS/(DEFICIT)	\$3,320.78	\$2,639.17	(\$283,533.54)	\$7,162.57	(\$320,000.00)	

Northbrook Public Library
 Income Statement
 December 2025

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	67%
05 - Debt Service Fund Revenues						
Undesignated Revenue						
Property Tax Levy	\$0.00	\$0.00	\$742,508.63	\$398,866.05	\$770,000.00	51.80%
Interest Income	\$0.00	\$0.00	\$483.74	\$0.00	\$0.00	0.00%
Total Undesignated Revenue	\$0.00	\$0.00	\$742,992.37	\$398,866.05	\$770,000.00	51.80%
Total Revenues	\$0.00	\$0.00	\$742,992.37	\$398,866.05	\$770,000.00	51.80%
Expenses						
Undesignated Expenses						
Capital Projects & Bond Expenses						
Interest Payments	\$0.00	\$0.00	\$332,934.72	\$325,000.00	\$325,000.00	100.00%
Principal Payments	\$0.00	\$0.00	\$425,000.00	\$445,000.00	\$445,000.00	100.00%
Total Capital & Bond Expenses	\$0.00	\$0.00	\$757,934.72	\$770,000.00	\$770,000.00	100.00%
Total Undesignated Expenses	\$0.00	\$0.00	\$757,934.72	\$770,000.00	\$770,000.00	100.00%
Transfers & Other Financing Uses						
Other Financing Uses	\$0.00	\$0.00	\$475.00	\$0.00	\$0.00	0.00%
Total Transfers & Other Financing Uses	\$0.00	\$0.00	\$475.00	\$0.00	\$0.00	0.00%
Total Expenses	\$0.00	\$0.00	\$758,409.72	\$770,000.00	\$770,000.00	100.00%
NET SURPLUS/(DEFICIT)	\$0.00	\$0.00	(\$15,417.35)	(\$371,133.95)	\$0.00	

DECEMBER 2025 FINANCIAL SUMMARY

As a reminder, the General Fund budget is allocated evenly across all 12 months. However, actual revenues and expenditures are recorded on a cash basis, meaning they reflect when payments are received or made. This timing difference can create variances early in the fiscal year.

Total General Fund revenues collected to date is \$5,605,956.

- Property Taxes – 51.80% of property taxes have been collected
 - Cook County's second installment property tax bills have been delayed due to the transition from an old mainframe to a new computer system.
 - On 11/7/25, Cook County announced that second installment property tax bills for Tax Year 2024 are expected to be mailed to property owners on November 14, 2025, with a due date of December 15, 2025.
 - To date, the Library has not received property tax revenue associated with the 2nd installment.
- Fines, Fees, and Rentals: Actual receipts have exceeded the conservative budget estimate.
- Interest Income: Actual receipts have exceeded the conservative budget estimate.

Total General Fund expenditures to date are \$6,093,768.

Several expenditure categories show variances to budget, primarily due to the timing of annual or multi-month payments being recorded early in the fiscal year:

- **Office & Library Supplies:** Lower than budget due to lower spending than anticipated.
- **Postage:** Higher than budget due to the annual postage deposit being paid.
- **General Insurance:** Higher than budget as the amount recorded represents approximately 10 months of expense.
- **Community Relations:** Higher than budget due to the formation of a meeting room policy work group, which worked with outside consultants to ensure the community had a voice in the process.
- **Vehicle Expense:** Lower than budget due to lower spending than anticipated.
- **Utilities:** Lower than budget due to gas costs being higher in winter months compared to summer months.
- **Building Repairs:** Higher than budget due to repairs being recorded when incurred not evenly throughout the year.
- **Recruiting:** Higher than budget due to reimbursing an out of state candidate for traveling costs.
- **Board Development:** Higher than budget due to recording membership costs to ALA and ILA for new trustees and ILA Annual Conference Registration costs.

Northbrook Public Library
Bills, Charges and Transfers for Board of Trustee Approval
Month of November 2025

Operating Funds

Library Claims List	\$ 265,925.53
Librarian's Claims List	\$ 13,778.21
Payroll	\$ 348,944.74
Fica/IMRF	\$ 56,125.82
ACH to IPBC	\$ 90,187.04
ACH to ADP	\$ 1,072.89
Transfer to Debt Service	\$ 604,000.00
Total Operating Funds	\$ 1,380,034.23

Capital Improvement Fund

Claims List	\$ 1,086.25
	\$ 1,086.25

Debt Service Fund

Principal & Interest 2013B	\$ 333,000.00
Principal & Interest 2019	\$ 178,375.00
Interest 2024	\$ 96,125.00
	\$ 607,500.00
Grand Total Library	\$ 1,988,620.48

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust General Checking

Transaction Number	Transaction Date	Vendor	Amount	Description
27062	11/20/2025	ABM Industry Groups LLC	\$ 15,459.97	Monthly Payment - Contracted Services
27063	11/20/2025	Abron Industrial Services, LLC	\$ 828.52	Per Occurance - Janitorial Supplies
27064	11/20/2025	Added Incentives, Inc.	\$ 3,615.00	Annual Payment - Programming
27065	11/20/2025	Ancel Glink P.C.	\$ 1,921.25	Monthly Payment - Professional Services
27066	11/20/2025	Beyond Coaching & Consulting	\$ 1,000.00	Annual Payment - Staff Development
27067	11/20/2025	Bright Plum Inc.	\$ 6,375.00	Annual Payment - Professional Services
27068	11/20/2025	Linkedin Corporation	\$ 7,000.00	Annual Payment - Materials
27069	11/20/2025	LR Consulting LLC	\$ 5,000.00	Per Occurance - Professional Services
27070	11/20/2025	Olsson Roofing Company, Inc.	\$1,075.00	Bi-Annual Payment - Contracted Services
27071	11/20/2025	Outsource Solutions Group, Inc.	\$26,472.48	Monthly Payment - Professional Services & Software
27072	11/20/2025	Ring Central Inc	\$26,567.70	Annual Payment - Telephone
27073	11/20/2025	Robert Oakley Gregory	\$6,500.00	Annual Payment - Equipment Rental and Maintenance (deposit)
27074	11/20/2025	Siemens Industry Inc.	\$1,100.00	Per Occurance - Equipment Rental and Maintenance
27075	11/20/2025	Stand Up Flooring LLC	\$750.00	Per Occuranc- Equipment Rental and Maintenance
27076	11/20/2025	Symmetry Energy Solutions, LLC	\$2,955.33	Monthly - Utiliities
27077	11/20/2025	Today's Business Solutions, Inc.	\$2,080.40	Quarterly Payment - Photocopy & Per Occurance - Supplies
27078	11/20/2025	Wex Health Inc.	\$1,951.84	Monthly Payment - Flexible Spending, Dedendant Care and Commuter Benefit
27079	11/20/2025	WM Corporate Services Inc.	\$745.86	Monthly Payment - Utilities
27080	11/20/2025	Yami Vending Inc.	\$809.28	Monthly Payment - Contigency & Programming
27081	11/28/2025	Amazon Capital Services	\$7,831.29	Monthly Payment - Supplies & Materials
27082	11/28/2025	Andrew Brown	\$750.00	Monthly Payment - Programming
27083	11/28/2025	Children's Plus Inc	\$1,389.54	Monthly Payment - Materials

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust General Checking

Transaction Number	Transaction Date	Vendor	Amount	Description
27084	11/28/2025	Cintas	\$616.75	Monthly Payment - Janitorial Supplies & Contracted Services
27085	11/28/2025	Computype, Inc. - 139154	\$1,470.40	Annual Payment - Supplies
27086	11/28/2025	Demco	\$1,279.71	Monthly Payment - Supplies
27087	11/28/2025	EBSCO Information Services	\$21,622.20	Monthly Payment - Materials
27088	11/28/2025	Fifth Star Collective, PLLC	\$3,337.50	Monthly Payment - Professional Services
27089	11/28/2025	Grainger	\$1,827.09	Monthly Payment - Janitorial
27090	11/28/2025	Ingram Library Services	\$18,158.87	Monthly Payment - Materials
27091	11/28/2025	Library Furniture International, Inc.	\$855.53	Per Occurance - Supplies
27092	11/28/2025	Midwest Tape LLC	\$10,093.27	Monthly Payment - Materials
27093	11/28/2025	NFIP Direct	\$8,227.00	Annual Payment - Insurance
27094	11/28/2025	North American Corp of Illinois	\$1,143.35	Monthly Payment - Janitorial Supplies
27095	11/28/2025	Northbrook Chamber of Commerce & Industry	\$950.00	Annual Payment - Community Relations
27097	11/28/2025	Outsource Solutions Group, Inc.	\$22,318.55	Monthly Payment - Professional Services & Software
27098	11/28/2025	Overdrive	\$25,700.25	Monthly Payment - Materials
27099	11/28/2025	Selden Fox, LTD	\$11,750.00	Annual Payment - Professional Services
27100	11/28/2025	Showcases	\$1,308.96	Monthly Payment - Supplies
27101	11/28/2025	Swank Motion Pictures Inc.	\$721.00	Monthly Payment - Programming
27102	11/28/2025	Thermosystems Building System Solutions	\$1,278.00	Per Occurance - Contracted Services
27103	11/28/2025	Village of Northbrook Water Dept.	\$1,974.70	Quarterly Payment - Utilities
27104	45989	Vis-O-Graphic, Inc.	\$ 9,113.94	Quarterly Payment - Community Relations

\$ 265,925.53

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust Librarian Checking

Transaction Number	Transaction Date	Vendor	Amount
54998	11/17/2025	Kathryn Hall	\$338.52
54999	11/28/2025	A-Z Mindfulness	\$150.00
55000	11/28/2025	ABOS	\$49.00
55001	11/28/2025	Acco Brands USA LLC	\$124.88
55002	11/28/2025	Paola Andrea Alfonso	\$8.99
55003	11/28/2025	Anna Amen	\$265.00
55004	11/28/2025	Aquatic Works LTD	\$370.00
55005	11/28/2025	Baker & Taylor	\$124.49
55006	11/28/2025	Svetlana Belsky	\$250.00
55007	11/28/2025	The Book Bin	\$100.00
55008	11/28/2025	Stacey Burgardt	\$24.99
55009	11/28/2025	Cardio Partners Inc.	\$588.59
55010	11/28/2025	Chicago Tribune	\$20.88
55011	11/28/2025	Criterion Pictures USA	\$520.00
55012	11/28/2025	Displays2Go	\$186.26
55013	11/28/2025	Elena Doubovitskaia-Klemer	\$250.00
55014	11/28/2025	Educate Station LLC	\$400.00
55015	11/28/2025	Adrienne Edwards	\$97.18
55016	11/28/2025	Fast Signs	\$485.15
55017	11/28/2025	Gale/Cengage Learning Inc.	\$574.21
55018	11/28/2025	Glenview Chess Club LLC	\$200.00
55019	11/28/2025	Benjamin Goluboff	\$250.00
55020	11/28/2025	Kathryn Hall	\$132.17
55021	11/28/2025	Halloran & Yauch, Inc.	\$180.00
55022	11/28/2025	Happiness Forward LLC	\$150.00
55023	11/28/2025	Sarang Heo	\$150.00
55024	11/28/2025	The Home Depot Credit Services	\$368.98
55025	11/28/2025	Illinois Heartland Library System-OCLC	\$21.52
55026	11/28/2025	Illinois Library Association	\$440.00
55027	11/28/2025	Image Specialties of Glenview, Inc.	\$16.00
55028	11/28/2025	Kelly Jordan	\$2.46
55029	11/28/2025	Korean Books & More	\$482.55
55030	11/28/2025	Lake Villa District Library	\$71.43
55031	11/28/2025	Lakeshore Learning Materials	\$114.43
55032	11/28/2025	Lechner Services	\$116.80

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust Librarian Checking

Transaction Number	Transaction Date	Vendor	Amount
55033	11/28/2025	Noggin Builders LLC	\$250.00
55034	11/28/2025	Noggin Builders LLC	\$250.00
55035	11/28/2025	Northbrook Hardware	\$77.10
55036	11/28/2025	Northbrook Star	\$71.99
55037	11/28/2025	Ocooch Hardwoods	\$196.99
55038	11/28/2025	Pace Systems INC	\$352.50
55039	11/28/2025	Panera, LLC	\$121.01
55040	11/28/2025	Petty Cash Custodian	\$146.92
55041	11/28/2025	Pitney Bowes Inc.	\$165.54
55042	11/28/2025	Primera Technology, Inc.	\$193.90
55043	11/28/2025	Laurie Prioletti	\$72.94
55044	11/28/2025	Quill LLC	\$342.25
55045	11/28/2025	Reaching Across Illinois Library System	\$405.00
55046	11/28/2025	RobotShop Inc.	\$9.52
55047	11/28/2025	Olga Rudiak	\$300.00
55048	11/28/2025	Simon Silver	\$250.00
55049	11/28/2025	Ryan Smith	\$500.00
55050	11/28/2025	Sony Pictures Classics Lockbox	\$300.00
55051	11/28/2025	Sphero, Inc.	\$37.80
55052	11/28/2025	State Industrial Products	\$323.01
55053	11/28/2025	Sunset Food Mart, Inc.	\$34.12
55054	11/28/2025	Tsai Fong Books, Inc.	\$354.36
55055	11/28/2025	Linda Vering	\$34.18
55056	11/28/2025	Robert Waterbury	\$50.00
55057	11/28/2025	Gary Wenstrup	\$315.00
55058	11/28/2025	WET Solutions, Inc.	\$185.09
55059	11/28/2025	WEX Bank	\$82.51
55060	11/28/2025	Brian Wilson	\$150.00
55061	11/28/2025	Yellowstone Landscape	\$582.00

\$13,778.21

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust Capital Improvements

Transaction Number	Transaction Date	Vendor	Amount	Description
1946	11/20/2025	Ancel Glink P.C.	\$ 1,086.25	Intrusion & Access Control Project
				\$ 1,086.25

Northbrook Public Library
Bills, Charges and Transfers for Board of Trustee Approval
Month of December 2025

Operating Funds

Library Claims List	\$ 211,297.74
Librarian's Claims List	\$ 6,872.71
Payroll	\$ 351,366.69
Fica/IMRF	\$ 56,473.27
ACH to IPBC	\$ 93,797.31
ACH to ADP	\$ 5,564.23
Total Operating Funds	\$ 725,371.95

Capital Improvement Fund

Claims List	\$ 235.00
	\$ 235.00

Debt Service Fund

Grand Total Library	\$ 725,606.95
----------------------------	----------------------

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust General Checking

Transaction Number	Transaction Date	Vendor	Amount	Description
27105	12/11/2025	ABM Industry Groups LLC	\$ 19,335.72	Monthly Payment - Contracted Services
27106	12/11/2025	Ann & Robert H. Lurie Children's Hospital of Chicago	\$ 1,150.00	Annual Payment - Staff Development
27107	12/11/2025	BambooHR	\$ 9,490.00	Annual Payment - Software
27108	12/11/2025	Best Quality Cleaning	\$ 11,965.36	Monthly Payment - Contracted Services (2 months of service)
27109	12/11/2025	Bibliotheca, LLC.	\$ 71,985.44	3 year payment - Equipment Rental and Maintenance
27110	12/11/2025	First Bankcard	\$ 7,197.48	Monthly Payment - Supplies
27111	12/11/2025	Siemens Industry Inc.	\$ 2,555.00	Quarterly Payment - Contracted Services
27112	12/11/2025	Wex Health Inc.	\$ 1,915.84	Monthly Payment - Flexible Spending, Deductible Care and Commuter Benefit
27113	12/11/2025	WM Corporate Services Inc.	\$769.86	Monthly Payment - Utilities
27114	12/23/2025	Ancel Glink P.C.	\$4,696.25	Monthly Payment - Professional Services
27115	12/23/2025	Children's Plus Inc	\$1,450.01	Monthly Payment - Materials
27116	12/23/2025	Colley Elevator Co.	\$720.00	Per Occurrence - Contracted Services
27117	12/23/2025	Gale/Cengage Learning Inc.	\$956.48	Monthly Payment - Materials
27118	12/23/2025	Impact Networking LLC	\$1,795.84	Quarterly Payment - Photocopy
27119	12/23/2025	Ingram Library Services	\$15,174.22	Monthly Payment - Materials
27120	12/23/2025	Midwest Tape LLC	\$4,356.11	Monthly Payment - Materials
27121	12/23/2025	Neuco Inc.	\$1,351.87	Per Occurrence - Janitorial Supplies
27122	12/23/2025	North American Corp of Illinois	\$1,918.72	Monthly Payment - Janitorial Supplies
27123	12/23/2025	Outsource Solutions Group, Inc.	\$23,136.83	Monthly Payment - Professional Services & Software
27124	12/23/2025	Overdrive	\$16,335.45	Monthly Payment - Materials
27125	12/23/2025	Robert Oakley Gregory	\$5,500.00	Annual Payment - Equipment Rental and Maintenance (final payment)
27126	12/23/2025	Symmetry Energy Solutions, LLC	\$4,645.77	Monthly Payment - Utilities
27127	12/23/2025	Temperature Equipment Corp.	\$2,253.08	Per Occurrence - Janitorial Supplies
27128	12/23/2025	Yami Vending Inc.	\$642.41	Monthly Payment - Contingency & Programming

\$ 211,297.74

Northbrook Public Library
 Bank Register Report
 Northbrook Bank & Trust Librarian Checking

Transaction Number	Transaction Date	Vendor	Amount
55062	12/23/2025	AAA Lock & Key Co.	\$13.75
55063	12/23/2025	American Library Association, Membership	\$520.00
55064	12/23/2025	Aquatic Works LTD	\$185.00
55065	12/23/2025	Bayscan Technologies	\$396.32
55066	12/23/2025	Becker's	\$227.28
55067	12/23/2025	C-Pac Inc.	\$216.00
55068	12/23/2025	Cintas	\$523.45
55069	12/23/2025	Demco	\$379.65
55070	12/23/2025	Dick Blick	\$24.43
55071	12/23/2025	EBSCO Information Services	\$21.52
55072	12/23/2025	Emery-Pratt Company	\$68.00
55073	12/23/2025	Grainger	\$146.75
55074	12/23/2025	Kim Hegelund	\$38.55
55075	12/23/2025	Laconi, Inc.	\$150.00
55076	12/23/2025	Lechner Services	\$116.80
55077	12/23/2025	Library Ideas LLC	\$584.72
55078	12/23/2025	Mallory Mortillaro	\$350.00
55079	12/23/2025	Neuco Inc.	\$141.35
55080	12/23/2025	Petty Cash Custodian	\$83.26
55081	12/23/2025	Laurie Prioletti	\$42.40
55082	12/23/2025	Runco Office Supply	\$103.80
55083	12/23/2025	Schaumburg Township District Library	\$90.00
55084	12/23/2025	Sentrum Marketing, LLC	\$414.20
55085	12/23/2025	Sheet Music Plus	\$175.82
55086	12/23/2025	Sony Pictures Classics Lockbox	\$300.00
55087	12/23/2025	Sunset Food Mart, Inc.	\$67.71
55088	12/23/2025	Swank Motion Pictures Inc.	\$396.00
55089	12/23/2025	Tee Jay Service Company, Inc.	\$450.00
55090	12/23/2025	Jessica Thomson	\$25.34
55091	12/23/2025	Tsai Fong Books, Inc.	\$170.61
55092	12/23/2025	Village of Northbrook	\$450.00

\$6,872.71

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust Capital Improvements

Transaction Number	Transaction Date	Vendor	Amount	Description
1947	12/23/2025	Ancel Glink P.C.	\$ 235.00	Intrusion & Access Control Project
				\$ <u>235.00</u>

Director's Report

January 2026 (Covers November & December 2025)

Agenda Items

7 Unfinished Business

7.1 Health Insurance Benefits Proposal

Becky Moore will be presenting the results of her extensive review of our health insurance benefits. There is an explanation of the work and options in the packet. In order to not overwhelm everyone with information, the appendix includes lots of supporting documentation for any board member who wants to do a deeper dive on any of the findings or options.

8 New Business

8.1 EDI Survey Report Presentation- Lily Zheng

The report from Lily Zheng and their slide deck is shared in the packet. Lily will be joining the meeting to share their findings and recommendations.

8.2 Master Plan Timeline & Next Steps

Anna and I have put together a timeline to go over with the board and an accompanying memo asks for direction on next steps.

8.3 Third Way Space Evaluation Proposal

I have a proposal for some Master Plan pre design work. I have outlined some options based on what the board would like to do with the Master Plan. The options and proposal are included in the packet.

8.4 Auditor Proposal FY26 to FY30

Anna Amen has prepared a memo requesting the board approve continuing with our current auditor.

8.5 Quarterly Strategic Plan Check In

Our quarterly strategic plan check in shares the last update for the Year 1 activities. A final Year 1 wrap up report is in the works.

8.6 Class 6b Request for 2525 Shermer Road

The Village has requested feedback on a Class 6B request. A memo explaining the 6B process from me and the accompanying documents from the Village are included in the packet.

8.7 Director Evaluation Process Review

We will go into closed session for the board to discuss the process for the annual Executive Director review.

10 Agenda Building

Next month will have the following items on the agenda:

- Potentially a continuation and final decision on the Benefits Review
- Follow-Up discussion on Zheng EDI report
- First review of the draft budget
- A presentation from Marketing on our brand refresh
- A presentation from OSG on our Cyber Security
- Annual Building Tour
- Director Evaluation Process next steps
- File detailed statement of all receipts and expenditures for previous 6 months as required by 50 ILCS 305/1

Board Update

Reminders

You will be getting an email from Cook County to fill out your Economic Disclosure Statement for the Statement of Economic Interest. For more information, please visit:
<https://www.cookcountyclerkil.gov/ethics/statements-economic-interest>

The State of the Village is on Tuesday, January 20 at 8:30-10am. Anyone who wishes to go and has not informed should do so asap so I can make sure to reserve a seat.

On the Board Portal we have a Board Calendar that shows the dates of all the board meetings. Is this something that anyone looks at? I will be asking in the meeting to see if we can remove or keep if useful.

Emails to Board

I want to take a moment to clarify how we handle emails from patrons that are sent to the Board. All Board members receive emails sent to the Board email address, and I am copied on those messages. When a patron email comes in, I connect with the Board President and we determine the appropriate response—whether it should come from me as Executive Director or from the Board President.

We then craft a single response, and the full Board is copied so everyone is aware of the outcome. This ensures the patron receives clear, consistent communication and avoids confusion caused by multiple or conflicting replies.

If Board members have thoughts or concerns about a message, please share them with me or the Board President so they can be incorporated into the response. Individual replies to patrons should be avoided so we maintain a unified voice.

Website Renovation

We are surveying the community about the website in advance of the design phase of updating the website and would appreciate hearing from the board. Here is a link to the survey: <https://www.surveymonkey.com/r/TCYJ2N7>

Connect with Our Community

Patron Feedback

We are now including the patron feedback in the link below. This will take you to the data dashboard and the most recent month's patron feedback is at the top of the page.

- [Northbrook Public Library Patron Feedback Link](#)

Collections

- Circulation Manager Kim Hegelund successfully submitted the ILLNET Report, showing that patron requests increased by more than 4,000 items during the reporting period while requests from other libraries to borrow our materials slightly decreased due to consortium growth.
- Circulation staff completed a major inventory project of picture books, collaborating with Technical Services on relabeling and scanning items as they were reshelfed. This systematic approach helped identify books that were missed during the initial relabeling process and provided valuable insights into the time requirements for collection projects of this scale.
- Adult Services updated e-resource offerings, maintaining CreativeBug while exploring Udemy as a potential replacement for LinkedIn Learning. We also began working on adding Wall Street Journal web access for 2026.
- Under the leadership of new Circulation Supervisor Colleen Reese, the overall inventory project will expand to include Video Games and Travel Books in the coming months.
- The transition from Boundless to Overdrive/Libby was completed successfully in December, providing patrons with enhanced access to digital materials.

Outreach & Partnerships

- We are developing an exciting new partnership with long time partner Total Link 2 Community that will include direct library outreach services and providing meeting

spaces. This partnership has given us a valuable opportunity to implement and test procedures from our new meeting room policy.

- Events Production Manager Arielle Raybuck joined the Village's 125th Anniversary Commission as the library representative, strengthening our partnership with local government. And congrats to Board President Stacy Oliver who will be chairing the committee.
- Adult Services staff Mary Lynn Sachs and Debbie Siegel presented a holiday Sing-Along program at Axelson Assisted Living, bringing library programming directly to community residents who may have difficulty visiting the library.
- The Northbrook Park District utilized our Auditorium, Civic Room, and Pollak Room for their winter play (December 9-13) when their leisure center space was unavailable due to renovations. This collaboration opened discussions about additional ways our organizations can work together.
- Our continued partnership with Rotary of Northbrook around public health education featured PhD researcher Simon Silver speaking about pandemic preparedness and mRNA technology, addressing science-based information to counter misinformation.

Programs

Winter Reading

Our Winter Reading Challenge launched December 1st and has seen strong participation with 526 adults registered and 238 having already completed the challenge by reading 4 books to earn a tote bag. Adults have collectively read 1,807 books. The program continues through January with weekly gift card drawings and an estimation jar activity.

Adult Services

- Adult Services Librarian Jill Franklin concluded 2025's lecture series with a virtual art history program on 'The Photography of Weegee,' focusing on the photographer known for capturing both crime scenes and the human emotions of onlookers in New York. The program received positive feedback with audience members making insightful observations.
- Illinois Libraries Present featured award-winning cookbook author and New York Times food columnist J. Kenji López-Alt on November 18th for an evening of cooking insights and culinary techniques, with 21 Northbrook patrons in attendance.
- On November 23rd, Victor Asuncion and Alexander Hersch performed. 107 patrons attended the concert. The pair performed several dramatic and romantic pieces by Beethoven, Faure, and Grieg. The performers said, "playing at the Northbrook Public Library is a treat." The performers received lots of positive feedback including: "It was wonderful." And "This is the best I've ever heard." "It is lovely."



Youth Services



• Finals Café took place for the first time in December, with Youth Services staff coordinating the event with support from Facilities and Adult Services. We had over 1,200 teens come and enjoy pizza during the three days. While successful, we experienced an increase in behavior-related issues compared to previous years and will debrief in January to improve programming plans and behavior management for future finals. Thank you to all the board members who volunteered and passed out pizza to the hard working teens.

- The Annual International Children's Film Festival on November 15th featured films from around the world, with 80 attendees voting for the UK short film 'Buzz' as the winner. The program concluded with a Q&A session featuring four directors and producers from the featured films.



Collaboratory Projects

Daniel Choi, Maker Specialist, assisted a patron

in making last-minute holiday gifts for coworkers during her visit home. She made a custom label for the candle and added a meme from onto a friend's shirt.



Maker Specialist Dylan McDowell worked with a patron to embroider a series of Sashiko patterns onto a fabric sheet to make a table runner. She was able to set the colors on her design, and used the camera function to line everything up to her satisfaction using paper templates she brought along. We were able to get these first three squares embroidered successfully - she has a bunch more and is planning to come back to finish the project.



Megan Hollister helped a patron with laser etching onto 2 wood boards. These are good examples of how different wood grains create dramatically different effects.



Assistant Manager Michelle Mistalski assisted a patron looking to

personalize multiple tote bags as Christmas gifts. The patron brought in their own embroidery files purchased from Etsy and with assistance from staff, they were able to align the initials to the graphics they have chosen. The patron was very pleased with how it came out and appreciated the Collaboratory staff for their patience and help.

Michelle also helped at the Sewing Machine Basics for Kids class, where attendees learned how to make drawstring bags. They all finished their bags and were really excited to store their favorite items in them. One let their parent know that they want to get a sewing machine to make more bags now that they know how to use a sewing machine.



Eric Flowers, Maker Specialist, helped a mother and her baby create an applique sweater for grandma using onesie scraps. While the machine's got a preset font for one applique letter at a time, the process for arranging the whole word required plenty of explanation from our Maker Specialists and patience.

Maker Specialist



Patrick Rodriguez, Maker Specialist, assisted a patron who came in with photocopies of her newborn grandson's hand and feet prints. He helped her to upload the photos, create her design, and then etched the bottles on the laser cutter. The patron made the gift for her daughter, the baby's mom.



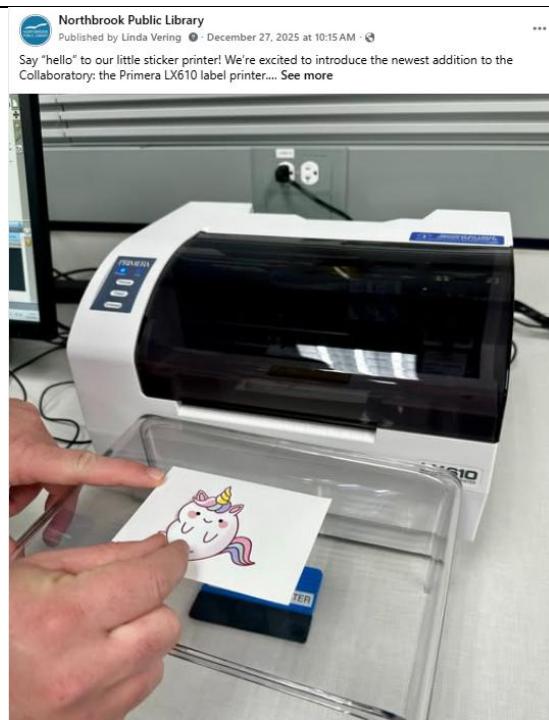
Joe Cirignani, Maker Specialist, worked with a returning patron to embroider little turkeys onto linen napkins. There were a few snags along the way because the design was fairly small and the napkin was quite thin, but they made it through and the patron was happy with the result.



Social Media

Social media engagement remained strong through the holiday season, with particular success promoting the Winter Reading Challenge and highlighting community partnerships. Our continued focus on showcasing library services and community connections has maintained consistent patron interaction across platforms.

<p>Facebook: It's the night before Winter Reading... 11/30/25 Views: 1,948 Interactions: 18 Shares: 1</p> <p></p>	<p>Instagram: Winter Reading Finisher Prize 11/19/25 Views: 539 Interactions: 19 Shares: 1</p> <p></p>
<p>Facebook: Forecast for next week: 100% chance of studying! 12/12/25 at 3:14pm Views: 15,052 Interactions: 95</p>	<p>12/27/25 at 10:15am Views: 1,446 Interactions: 24</p>



Instagram Reel: **Study Then pizza!**
 12/17/25
 Views: 647, Likes & Reactions: 71, Shares: 17



Instagram: **Happy Holidays**
 Posted on 12/25/24 Views: 234, Likes & Reactions: 18



Build an Inclusive Culture

CE & Training

- All staff completed their annual sexual harassment compliance training in November, maintaining our commitment to a safe and professional workplace environment.
- The newly formed Safety and Security Committee held its kickoff meeting on December 10th, providing staff with a stronger voice in safety and security initiatives. The committee will focus on implementing feedback from the January 23, 2026 safety training and operationalizing our Emergency Operations Plan.
- Our Person in Charge (PIC) quarterly meeting in December provided an opportunity to reflect on staff's strong response to various incidents during 2025 and to debrief recent patron behavior incidents.

Personnel

Hires

- Janelle Duthie joined as full-time HR Assistant/Volunteer Coordinator on November 3, allowing Jennifer McGee to transition to serving full-time as Executive Assistant to support Kate and Kelly.
- Adna Mujović, part-time seasonal, Circulation Clerk (CIRC), joined effective December 1.

Change in Position and/or Status

- Laura Martinez, changed from part-time Circulation Clerk (CIRC) to part-time substitute Circulation Clerk (CIRC) effective November 7.
- Ronald Mangas, changed from part-time Security Monitor (FAC) to part-time substitute Security Monitor (FAC) effective November 30.
- Sophia Remé, changed from part-time Circulation Clerk (CIRC) to part-time substitute Circulation Clerk (CIRC) effective December 28.

Departures

- Jacob Ready, part-time, Facilities Worker (FAC) terminated December 22.
- Sy Jaffery, regular part-time, Security Monitor (FAC) terminated December 30.

Create Spaces to Belong

Safety

- Our Intrusion Alert and Access Control upgrade project reached a major milestone with the new intrusion alert system going live on December 19th. The project is on track for completion by the end of January, with key staff now trained on the new Verkada software system.
- Following RAILS training on best practices for working with law enforcement while protecting patron privacy, we updated public desk procedures including locking

drawers and cabinets and discontinuing the practice of holding patron IDs at service desks.

- The new Patron Behavior policy was successfully implemented following adoption at the November Board meeting, with staff providing valuable feedback for ongoing procedural refinements.

Technology

- We continued collaboration with Fifth Star Collective on data analysis and reporting improvements, with ongoing planning meetings to enhance our statistical collection and analysis capabilities.

Finance

- On 11/7/25, Cook County announced that second installment property tax bills for Tax Year 2024 are expected to be mailed to property owners on November 14, 2025, with a due date of December 15, 2025. The Library has received a very small portion of the property tax revenue associated with the 2nd installment.

Kate Hall, Executive Director

Fiscal Year-to-Date Statistics Dashboard

This dashboard displays fiscal year-to-date (FYTD) statistics for key data categories tracked by the Northbrook Public Library (NPL). Alongside the definition of each statistic, an FYTD total is provided, with an indicator denoting the percentage change comparing the current FYTD total to the same time period the previous fiscal year.



Connecting with Our Community



Cardholders

21,971

↑ 3.1%

The number of unexpired NPL cardholders as of the last day of the previous month



Building Visits

192,594

↑ 5.5%

The number of in-person patron visits to the NPL building



Community Outreach

Events
50

↓ -13.8%

The number of outreach events/activities conducted by NPL staff, and the number of community members reached



Staff Continuing Education

1,765

↑ 2.5%

The number of continuing education hours completed by NPL staff

Sharing Books & Materials



Physical Collections

224,024

↓ -0.7%

The number of physical materials owned by NPL as of the last day of the previous month



Circulation

Physical
431,492

↓ -4.2%

The number of checkouts of physical and downloadable materials from NPL collections



Downloadable

143,270

↑ 10.1%

Using Spaces & Services



Computer Use

10,606

↑ 4.0%

The number of hours that public NPL computers were used by patrons



WiFi Use

87,988

↑ 19.5%

The number of unique devices that access NPL WiFi each day

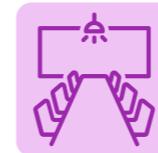


Study Room Use

9,900

↑ 13.8%

The number of NPL study room reservations made by patrons



Meeting Room Use

Total
320

↑ 15.1%

The number of NPL meeting room reservations made by patrons

Auditorium

2

↑ N/A



Program Engagement

Events
580

↑ 28.0%

The number of programs offered by NPL, and the number of patrons who attend

Attendance

16,111

↑ 21.1%



One-on-Ones

2,146

↓ -62.7%

The number of one-on-one learning sessions (pre-scheduled or walk-in) lasting 15 minutes or more offered to NPL patrons

Attendance

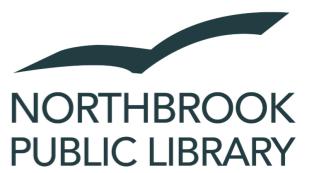
Updated with the most recent available data as of: Dec 10, 2025, 10:28 AM

Please note that certain statistics are only updated on a monthly basis, with data from a given month entered by the 7th day of the following month.

Page 38 of 265

Monthly Statistics Dashboard

(Page 1 of 3)



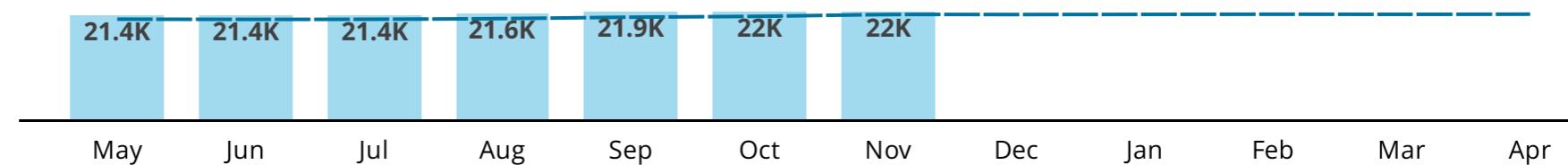
This dashboard displays monthly statistics for key data categories tracked by the Northbrook Public Library (NPL). For each statistic, a combo chart displays the current fiscal year's data as light blue columns and the previous fiscal year's data as a dark blue dashed line, for comparison purposes. A fiscal year-to-date (FYTD) total is also provided to the right of each combo chart, with an indicator denoting the percentage change comparing the current FYTD total to the same time period the previous fiscal year.

Connecting with Our Community



Cardholders

The number of unexpired NPL cardholders as of the last day of the previous month



FYTD Totals

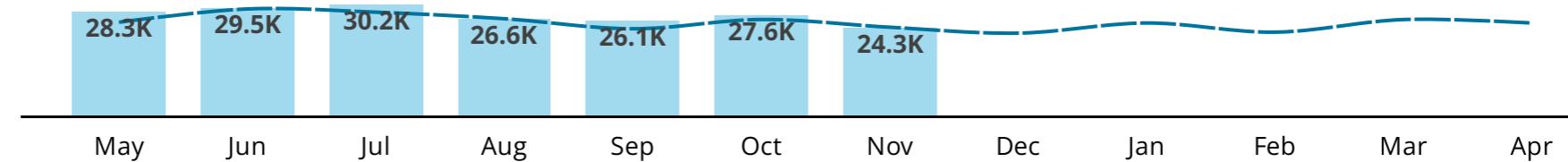
21,971

▲ 3.1%



Building Visits

The number of in-person patron visits to the NPL building



192,594

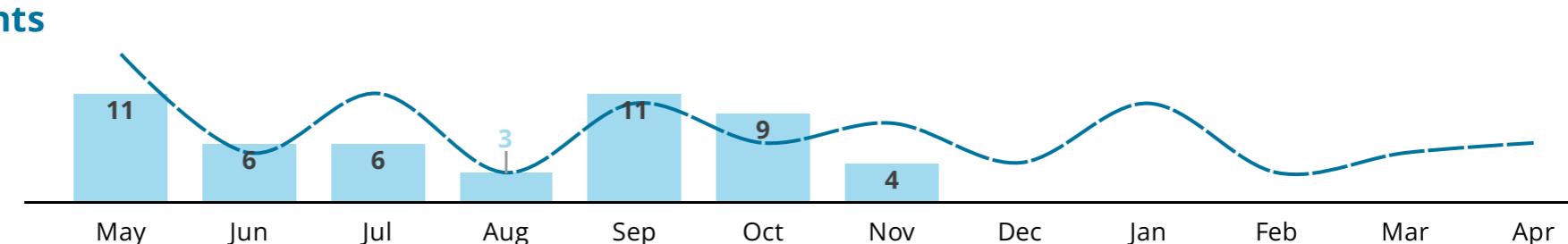
▲ 5.5%



Community Outreach

The number of outreach events/activities conducted by NPL staff, and the number of community members reached

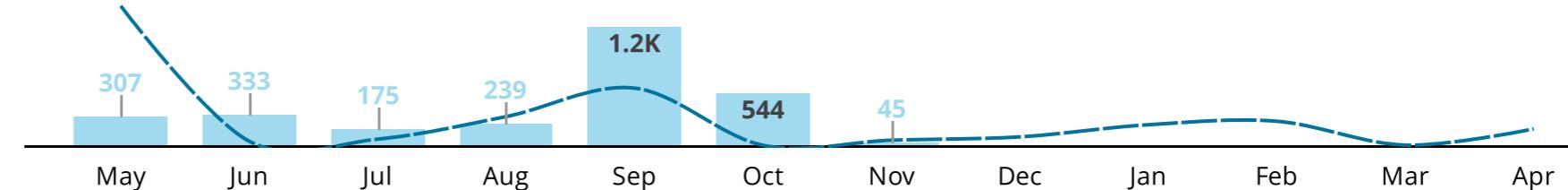
Events



50

▼ -13.8%

People Reached



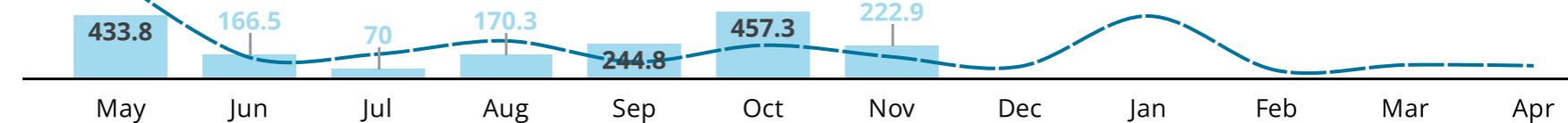
2,862

▲ 14.1%



Staff Continuing Education

The number of continuing education hours completed by NPL staff

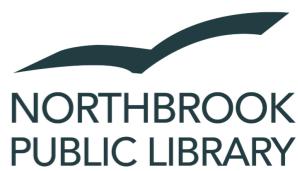


1,765

▲ 2.5%

Monthly Statistics Dashboard

(Page 2 of 3)



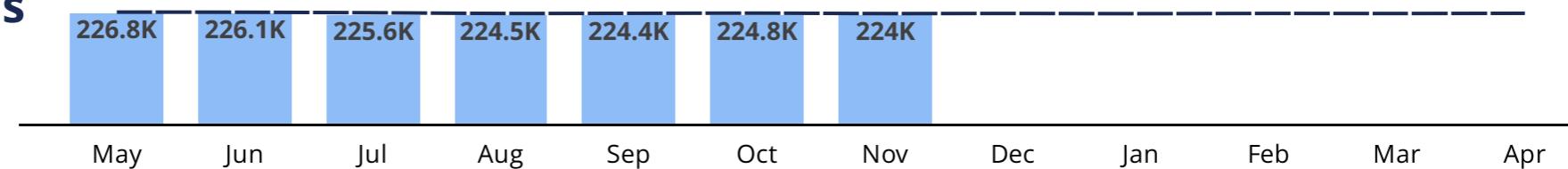
This dashboard displays monthly statistics for key data categories tracked by the Northbrook Public Library (NPL). For each statistic, a combo chart displays the current fiscal year's data as light green or light purple columns and the previous fiscal year's data as a dark green or dark purple dashed line, for comparison purposes. A fiscal year-to-date (FYTD) total is also provided to the right of each combo chart, with an indicator denoting the percentage change comparing the current FYTD total to the same time period the previous fiscal year.

Sharing Books & Materials



Physical Collections

The number of physical materials owned by NPL as of the last day of the previous month



FYTD Totals

224,024

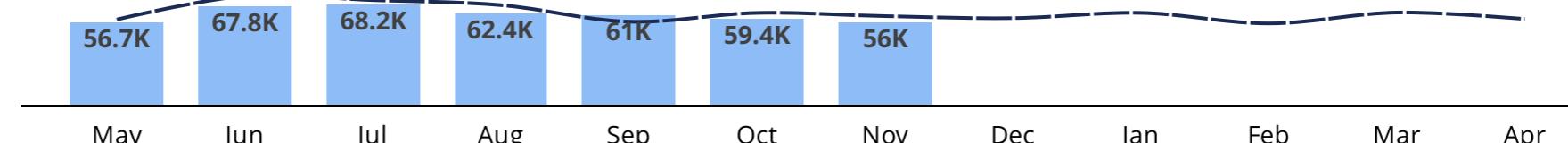
⬇ -0.7%



Circulation

Physical

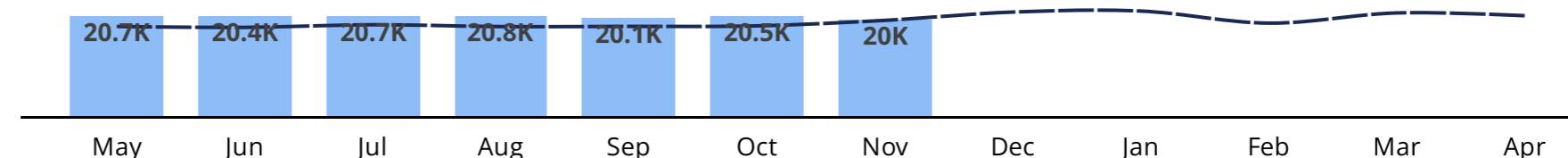
The number of checkouts of physical and downloadable materials from NPL collections



431,492

⬇ -4.2%

Downloadable



143,270

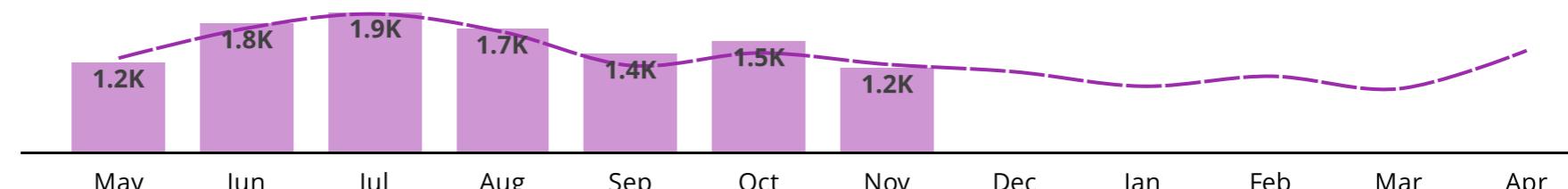
⬆ 10.1%

Using Spaces & Services



Computer Use

The number of hours that public NPL computers were used by patrons



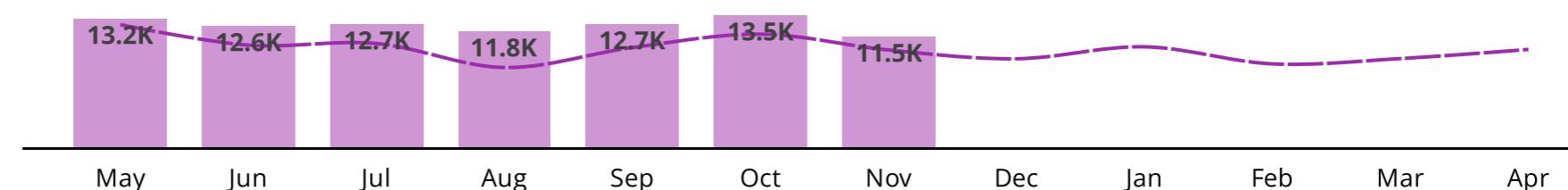
10,606

⬆ 4.0%



WiFi Use

The number of unique devices that access NPL WiFi each day

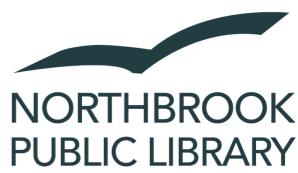


87,988

⬆ 19.5%

Monthly Statistics Dashboard

(Page 3 of 3)



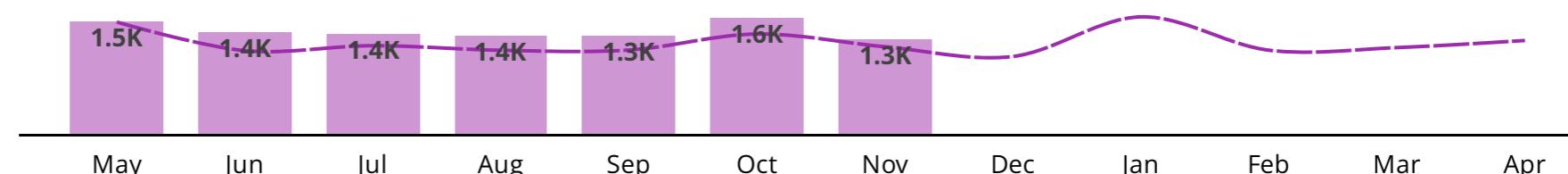
This dashboard displays monthly statistics for key data categories tracked by the Northbrook Public Library (NPL). For each statistic, a combo chart displays the current fiscal year's data as light purple columns and the previous fiscal year's data as a dark purple dashed line, for comparison purposes. A fiscal year-to-date (FYTD) total is also provided to the right of each combo chart, with an indicator denoting the percentage change comparing the current FYTD total to the same time period the previous fiscal year.

Using Spaces & Services



Study Room Use

The number of NPL study room reservations made by patrons



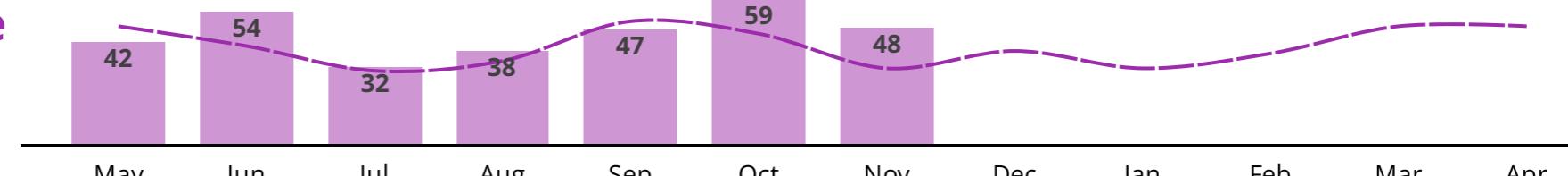
FYTD Totals

9,900
↑ 13.8%



Meeting Room Use

The number of NPL meeting room reservations made by patrons

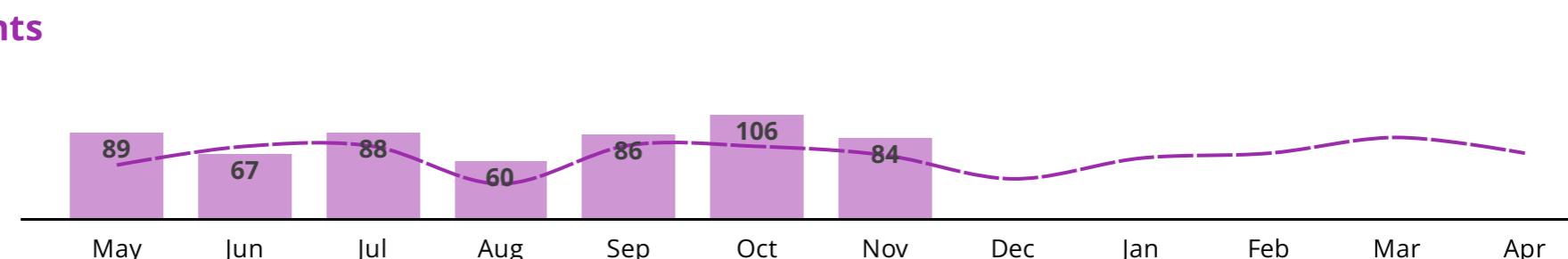


320
↑ 15.1%



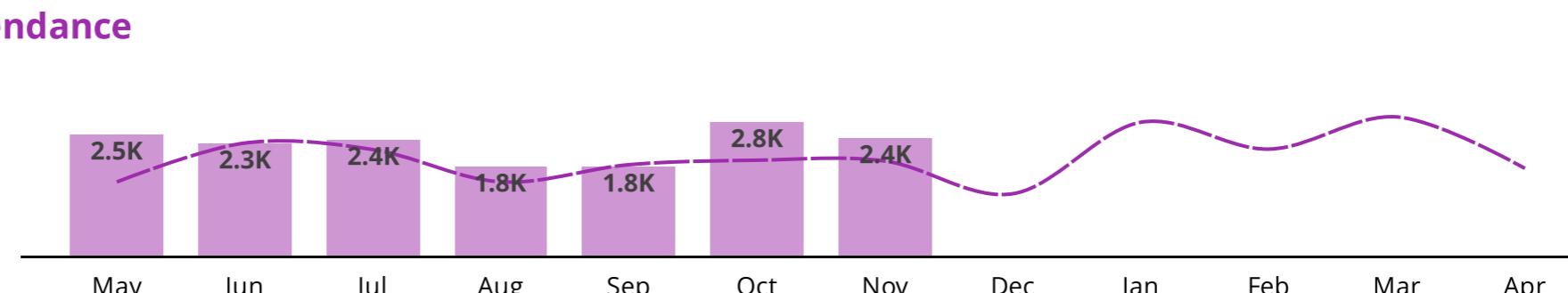
Program Engagement

The number of programs offered by NPL, and the number of patrons who attend



580
↑ 28.0%

Events

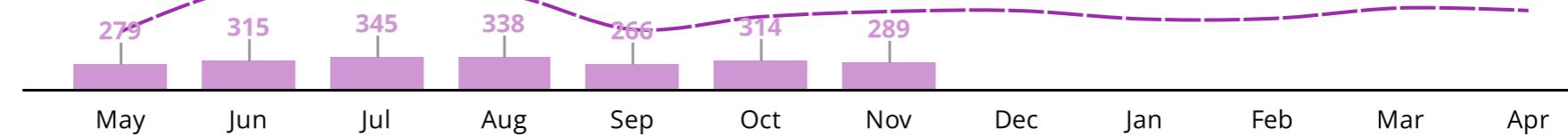


16,111
↑ 21.1%



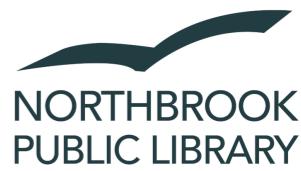
One-on-Ones

The number of one-on-one learning sessions (pre-scheduled or walk-in) lasting 15 minutes or more offered to NPL patrons



2,146
↓ -62.7%

Fiscal Year-to-Date Statistics Dashboard



This dashboard displays fiscal year-to-date (FYTD) statistics for key data categories tracked by the Northbrook Public Library (NPL). Alongside the definition of each statistic, an FYTD total is provided, with an indicator denoting the percentage change comparing the current FYTD total to the same time period the previous fiscal year.

Connecting with Our Community



Cardholders

The number of unexpired NPL cardholders as of the last day of the previous month

21,923

↑ 2.9%



Building Visits

The number of in-person patron visits to the NPL building

217,489

↑ 6.1%



Community Outreach

The number of outreach events/activities conducted by NPL staff, and the number of community members reached

Events
53

↓ -14.5%

People Reached

2,933

↑ 12.6%



Staff Continuing Education

The number of continuing education hours completed by NPL staff

1,859

↑ 2.9%



Computer Use

The number of hours that public NPL computers were used by patrons

11,707

↑ 3.7%



WiFi Use

The number of unique devices that access NPL WiFi each day

99,815

↑ 20.6%



Study Room Use

The number of NPL study room reservations made by patrons

11,214

↑ 14.9%



Meeting Room Use

The number of NPL meeting room reservations made by patrons

Total
356

↑ 12.7%

Auditorium

2

↑ N/A

Sharing Books & Materials



Physical Collections

The number of physical materials owned by NPL as of the last day of the previous month

223,944

↓ -0.9%



Program Engagement

The number of programs offered by NPL, and the number of patrons who attend

Events
638

↑ 29.1%

Attendance

18,810

↑ 29.0%



Circulation

The number of checkouts of physical and downloadable materials from NPL collections

Physical

489,025

↓ -4.0%

Downloadable

163,522

↑ 8.0%



One-on-Ones

The number of one-on-one learning sessions (pre-scheduled or walk-in) lasting 15 minutes or more offered to NPL patrons

2,626

↓ -60.0%

Updated with the most recent available data as of: Jan 7, 2026, 10:34 AM

Please note that certain statistics are only updated on a monthly basis, with data from a given month entered by the 7th day of the following month.

Page 42 of 265

Monthly Statistics Dashboard

(Page 1 of 3)



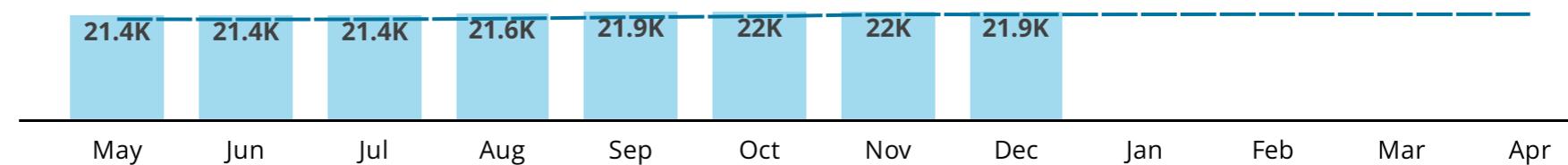
This dashboard displays monthly statistics for key data categories tracked by the Northbrook Public Library (NPL). For each statistic, a combo chart displays the current fiscal year's data as light blue columns and the previous fiscal year's data as a dark blue dashed line, for comparison purposes. A fiscal year-to-date (FYTD) total is also provided to the right of each combo chart, with an indicator denoting the percentage change comparing the current FYTD total to the same time period the previous fiscal year.

Connecting with Our Community



Cardholders

The number of unexpired NPL cardholders as of the last day of the previous month



FYTD Totals

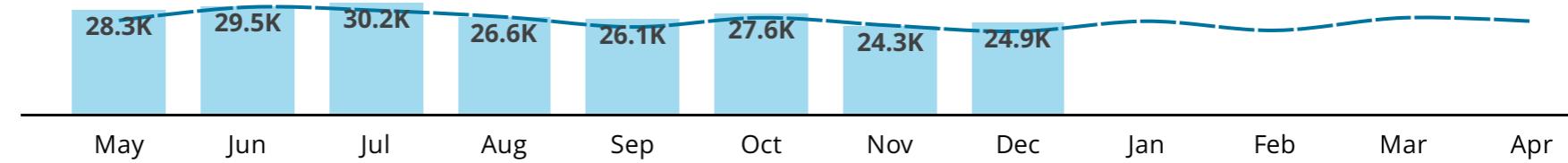
21,923

▲ 2.9%



Building Visits

The number of in-person patron visits to the NPL building



217,489

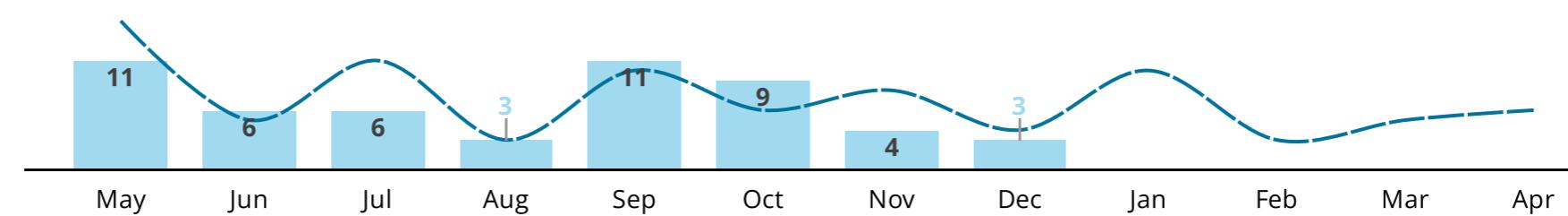
▲ 6.1%



Community Outreach

The number of outreach events/activities conducted by NPL staff, and the number of community members reached

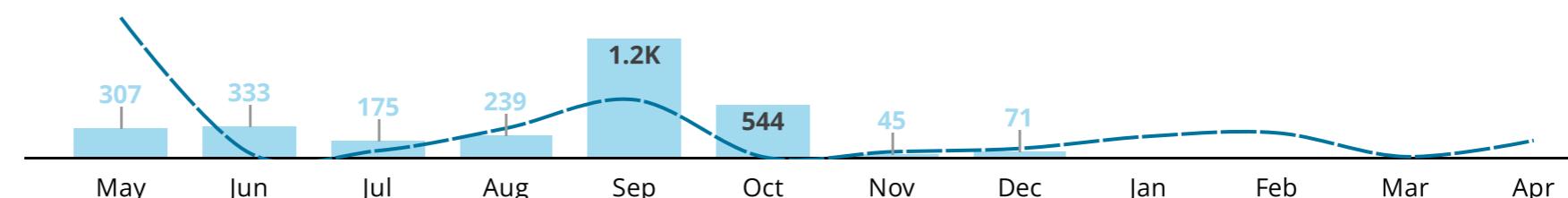
Events



53

▼ -14.5%

People Reached



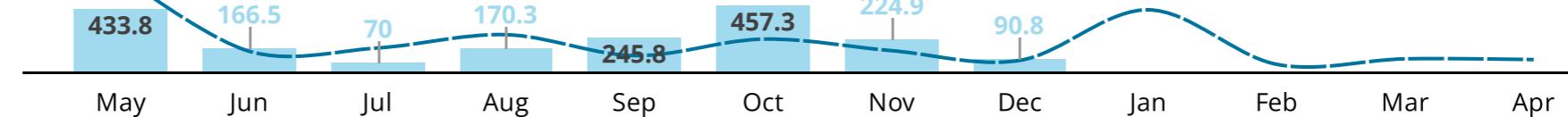
2,933

▲ 12.6%



Staff Continuing Education

The number of continuing education hours completed by NPL staff

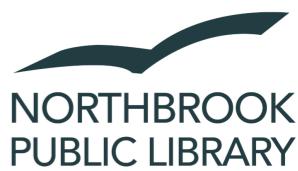


1,859

▲ 2.9%

Monthly Statistics Dashboard

(Page 2 of 3)



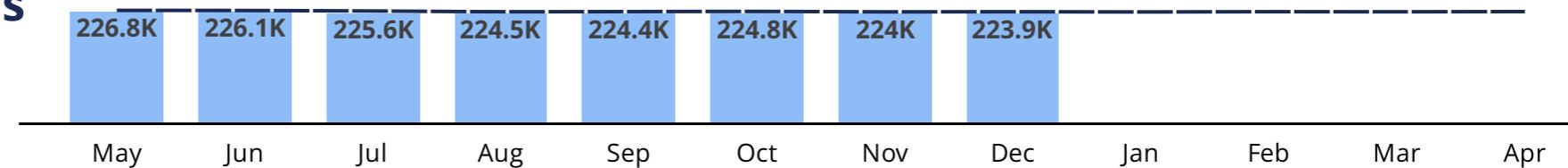
This dashboard displays monthly statistics for key data categories tracked by the Northbrook Public Library (NPL). For each statistic, a combo chart displays the current fiscal year's data as light green or light purple columns and the previous fiscal year's data as a dark green or dark purple dashed line, for comparison purposes. A fiscal year-to-date (FYTD) total is also provided to the right of each combo chart, with an indicator denoting the percentage change comparing the current FYTD total to the same time period the previous fiscal year.

Sharing Books & Materials



Physical Collections

The number of physical materials owned by NPL as of the last day of the previous month



FYTD Totals

223,944

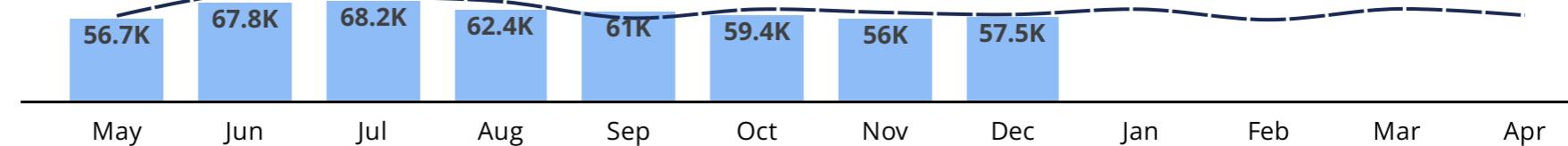
⬇ -0.9%



Circulation

Physical

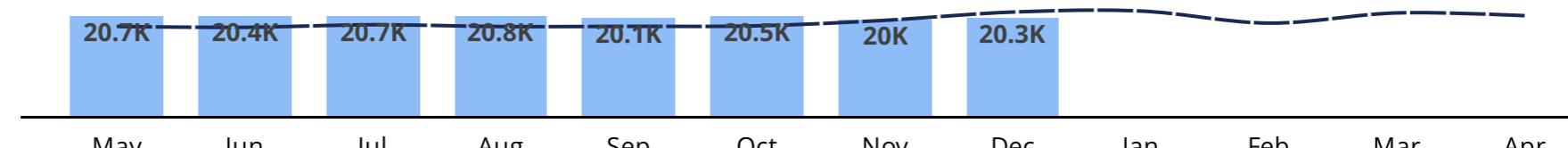
The number of checkouts of physical and downloadable materials from NPL collections



489,025

⬇ -4.0%

Downloadable



163,522

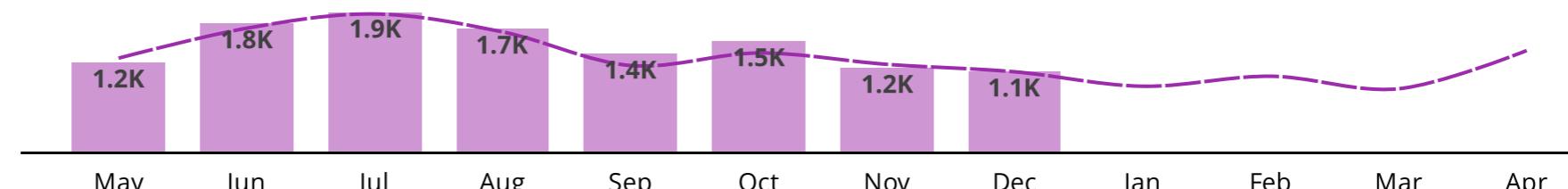
⬆ 8.0%

Using Spaces & Services



Computer Use

The number of hours that public NPL computers were used by patrons



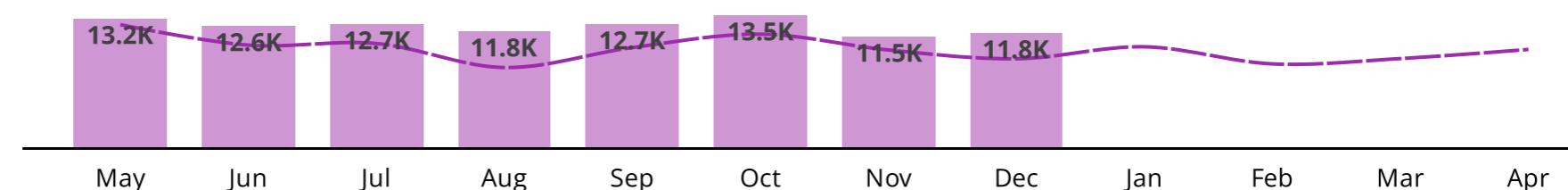
11,707

⬆ 3.7%



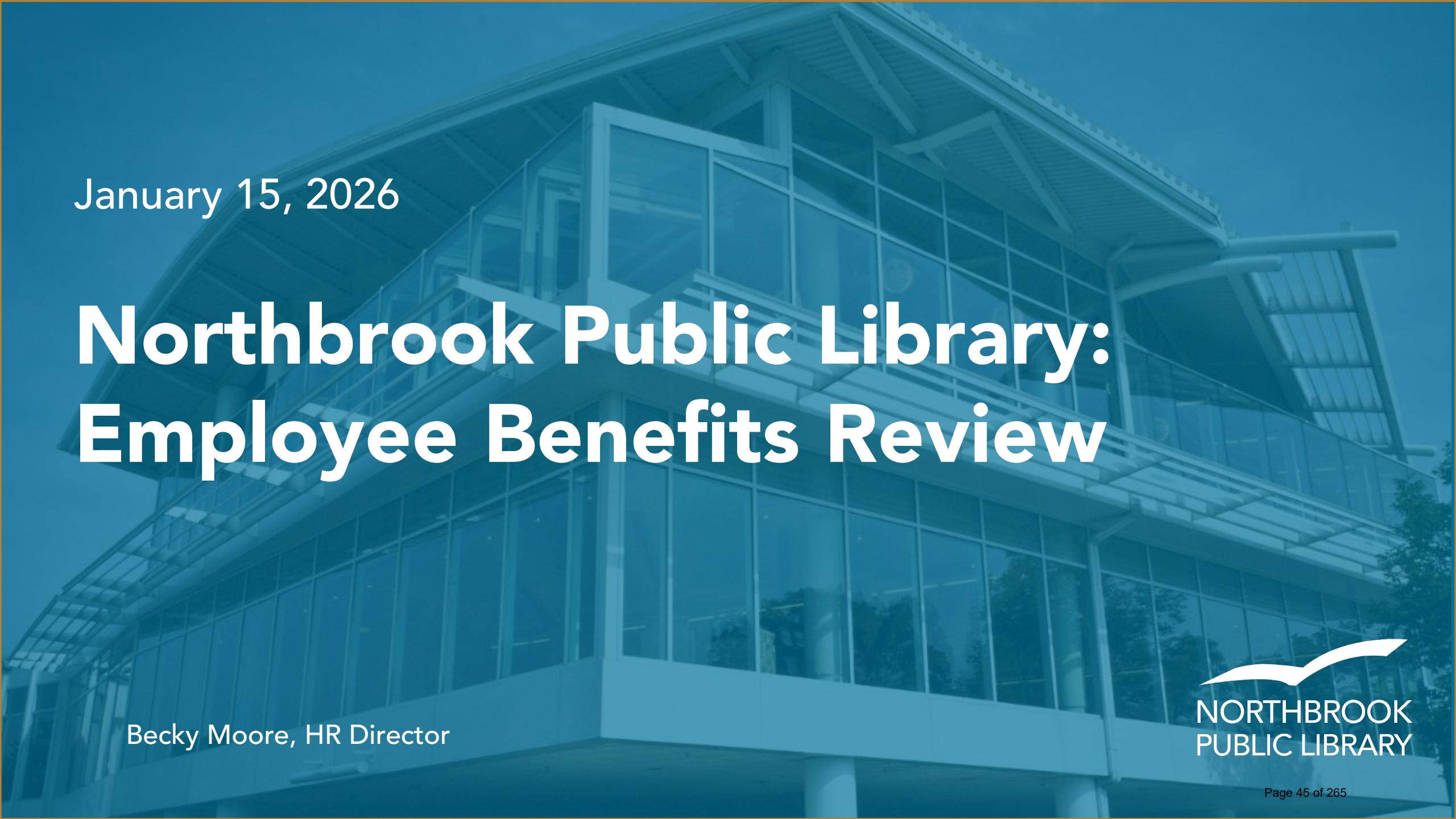
WiFi Use

The number of unique devices that access NPL WiFi each day



99,815

⬆ 20.6%

The background image shows the exterior of the Northbrook Public Library. The building is a modern structure with a large glass facade and a white steel frame. The sky is clear and blue. A white decorative element, resembling a stylized wave or a series of pipes, is mounted on the building's facade.

January 15, 2026

Northbrook Public Library: Employee Benefits Review

Becky Moore, HR Director

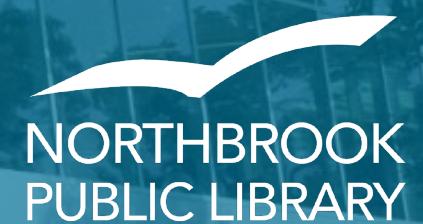


Table of Contents

- 1) Benefits Philosophy & Background
- 2) What NPL is Currently Offering: Employee Health, Dental, & Vision Benefits
- 3) The Benefits Review: What We Looked At
- 4) For Your Consideration: 2026 Employee Benefits Options
- 5) Evaluating 2026 Benefit Options: Cost-Benefit & Value Assessment
- 6) Next Steps
- 7) Appendix

1. Benefits Philosophy and Background

The Employee Benefits Review is closely aligned with the board approved Compensation Philosophy and Strategy (see Appendix A):

- Market Competitiveness: Ensure our benefits remain robust to attract and retain high performing talent. Benefits typically constitute 38-40% of a public sector employee's total compensation package.
- Values-Driven: Grounded in the library's core values, seek to meet the needs of staff across all life stages and identities
- Fiscal Responsibility: Balance staff needs with our duty as a tax-funded institution.

1. Benefits Philosophy and Background

- **External Outlook:** Early forecasts from the Intergovernmental Personnel Benefits Cooperative (IPBC) indicate a continued upward trend in insurance rates for the July 2026 renewal cycle. Although final rates will not be confirmed until later (March 2026), we are keeping these projected increases in mind as we evaluate our benefits options.
- **Our Benefits Review Objective:** Determined by the compensation philosophy, staff feedback, and overall strategy— maintain robust benefit options for staff and look for cost saving opportunities for staff and the library

2. What NPL is Currently Offering: Employee Health, Dental, & Vision Benefits

2. What NPL is Currently Offering: Employee Health, Dental, & Vision Benefits

Northbrook Public Library currently offers:

- 1 PPO Plan, 2 HMO Plans, 1 Dental Plan, and 1 Vision Plan
- The insurance company and network for the PPO and HMO plans is Blue Cross Blue Shield of IL; Dental is Delta Dental, Vision is VSP
- Monthly insurance premium cost-share
 - For all current plans the following cost-share applies:
 - Single (employee only coverage) – 90% Library / 10% Employee
 - Dependent coverage (employee + spouse, employee + children, and family) – 80% Library / 20% Employee

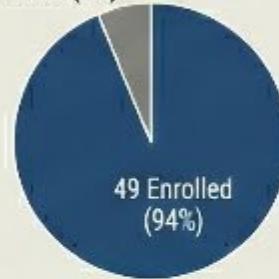
2. What NPL is Currently Offering: Employee Health, Dental, & Vision Benefits

Current Insurance Enrollment Breakdown: FT Staff (52 Total)

Health Insurance (BCBS)

Total Participation

3 Not Enrolled (6%)



Plan Type

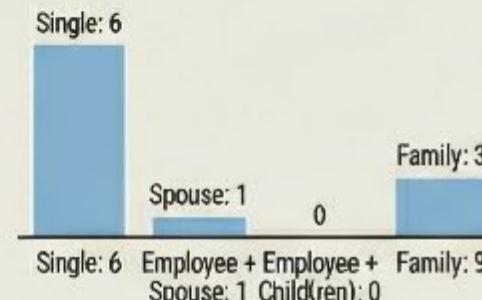
BANMO (3)
HMOI (7)
PPO (39)

Coverage Tier

PPO - BCBS (39)



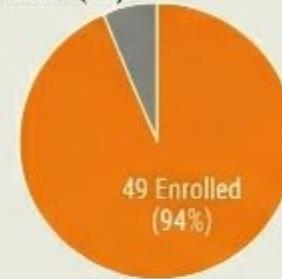
HMO Options (10)



Dental Insurance (Delta Dental PPO)

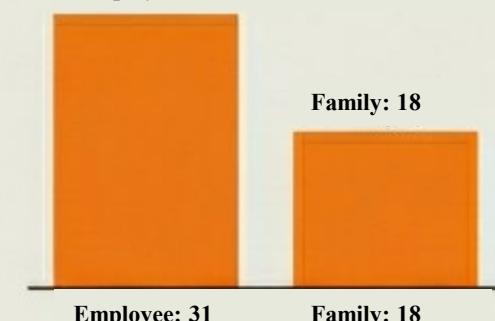
Total Participation

3 Not Enrolled (6%)



Coverage Tier

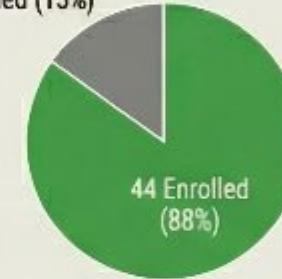
Employee: 31



Vision Insurance (VSP)

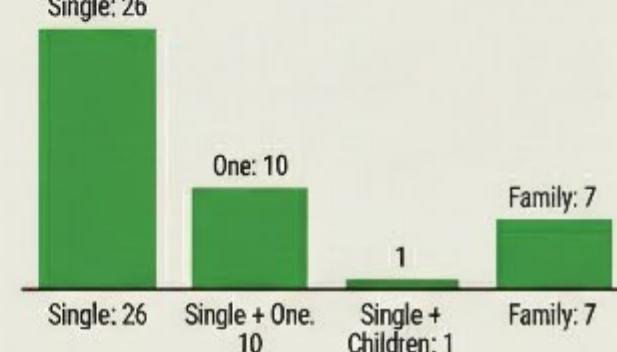
Total Participation

8 Not Enrolled (15%)



Coverage Tier

Single: 26



2. What NPL is Currently Offering: Employee Health, Dental, & Vision Benefits

- For further details about our current health, dental, and vision benefits, refer to Appendix B for the current insurance rates and Appendix C for a Summary of our health, dental, and vision plan designs, which show current plan features such as deductibles, copays, and out-of-pocket maximums.
- In the next slide, we show an estimate of the total current annual cost of the health, dental, and vision plans. In both this current estimate and the benefits proposals to come, we made several assumptions in the data:
 1. We assume the 3 employee who currently decline health insurance are enrolled in the PPO plan with single coverage.
 2. We also assume the 3 employees who currently decline dental insurance are enrolled in single dental coverage and the 8 employees who currently decline vision insurance are enrolled in single vision coverage.

2. What NPL is Currently Offering: Employee Health, Dental, & Vision Benefits

TOTAL CURRENT ANNUAL COSTS

DESCRIPTION	EMPLOYEE COSTS	LIBRARY COST	TOTAL COST
Current Annual Costs	\$159,490.78	\$899,068.10	\$1,058,558.88

INCLUDES THE FOLLOWING:

-  1 PPO
-  2 HMO
-  Dental
-  Vision

COVERAGE DETAILS:

- 90%/10% coverage for single employee
- 80%/20% coverage for dependent coverage



3. The Benefits Review: What We Looked At

3. The Benefits Review: What We Looked At

- Benefit Plan Designs: Evaluated the balance of premiums, deductibles, and out-of-pocket maximums to maintain a sustainable benefits budget for both our staff and the Library.
- Benefit Plan Changes: Evaluated replacing our current PPO plan with two new Blue Choice PPO options and adding a High Deductible Health Plan (HDHP) with Health Savings Account (HSA).
- Staff Impact: Analyzed current enrollment patterns—where 94% of benefits eligible staff utilize our health and dental plans—to ensure proposed changes support our actual workforce needs.

3. The Benefits Review: What We Looked At

- Peer Library Comparison: Reviewed detailed plan designs from four peer libraries (see Appendix D) to ensure our offerings remain competitive for recruitment and retention.
- Industry Standards: Analyzed the results of the IPBC Benchmarking Survey to align our cost-sharing and plan types with broader industry and regional trends and evaluated proposed changes from IPBC (see Appendix E and Appendix F).

3. The Benefits Review: What We Looked At

Staff Feedback

- In October 2025, HR launched a benefits priorities survey for all full-time staff.
- The survey used a mix of ranking and open-ended questions. Staff were given the opportunity to share the features of our current benefit offerings that mattered most to them and what changes they might like to see implemented.
- 64% of benefits eligible staff members completed the survey.
- The following slides highlight the top key takeaways and strategic areas of opportunity for the upcoming 2026 benefits plan year (see Appendix G for full survey results).

Key Takeaways from Benefits Priorities Survey

1. Overall satisfaction with benefits is high:

-78% of survey respondents reported they were satisfied or highly satisfied with the benefits offered.

2. Affordability of benefits is the driving primary concern for staff

-When asked to rank what was most important about their health insurance, both affordable premiums and affordable deductibles/out-of-pocket maximums were the top two ranked benefits. (See Chart 1)

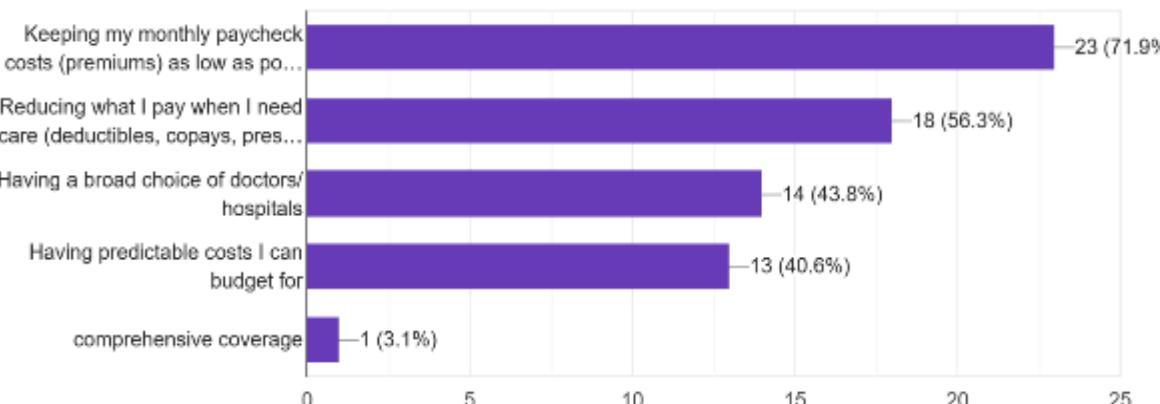
3. Access to Quality Providers

-The ability to maintain access quality providers was also a top priority.

Chart 1

1. When you think about your health insurance, what is most important to you personally (select all that apply)?

32 responses



Areas of Opportunity from the Benefits Priorities Survey

1. Staff Desire Plan Choice and Flexibility

-An overwhelming majority (75% of respondents) selected, "A mix of options so employees can choose what fits them best" over any single trade-off (i.e., lower premium/higher deductible or vice-versa). (See Chart 2)

2. Moderate Interest in HDHP PPO with Conditions

-There is interest in exploring a High Deductible Health Plan (HDHP) with an HSA. However, this interest is conditional on the library: 1) contributing funds to the HSA and 2) providing training on how to use it effectively. (See Chart 3)

3. Ongoing Staff Education is Critical

-The complexity of benefits is a concern, with staff expressing interest in more education around comparing plan options and understanding billing and medical costs.

Chart 2

3. If you had to choose, which would you prefer?

32 responses

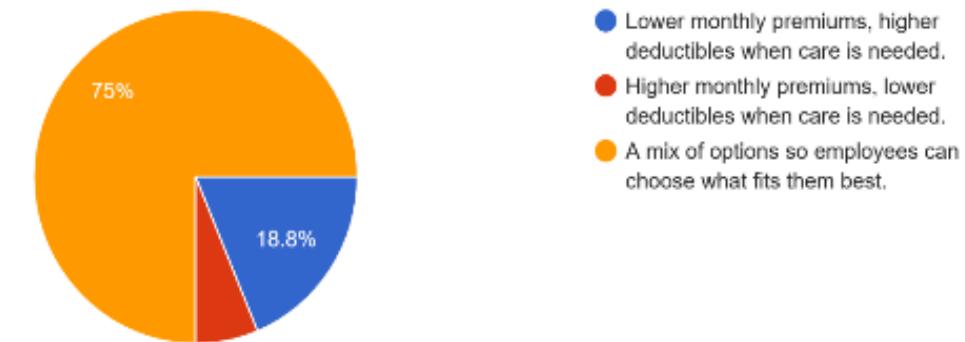
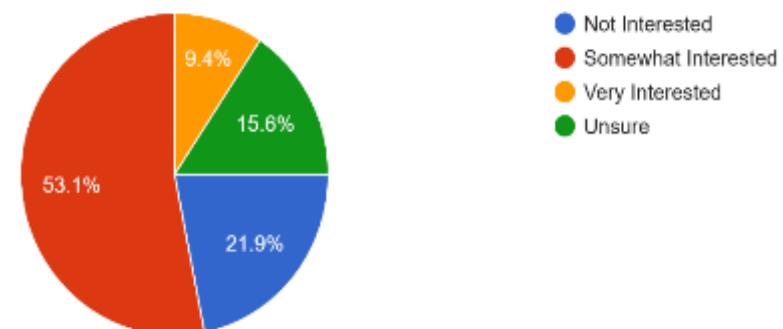


Chart 3

4. How interested would you be in a High Deductible Health Plan (HDHP) with a Health Savings Account (HSA) if: the library contributed funds to th... and provided training on how to use it effectively?

32 responses



4. For Your Consideration: 2026 Employee Benefits Plan Options

4. For Your Consideration: 2026 Employee Benefits Options

We have the following proposed benefits plan options to share with the board:

➤ 1. Option A

♦ How Option A differs from current benefit offerings ♦

1. Current PPO is replaced with two new Blue Choice PPO plans – BCO1 and BCO2
2. A HDHP PPO with HSA has been added
3. The premium cost-share is different: in Option A the HMO plans cost-share is now 100% / 0% (employer/employee) for single coverage, and 90% / 10% for dependent coverage. The new PPO plans cost-share remains the same as the existing PPO plan (90%/10% employer/employee single coverage and 80%/20% employer/employee dependent coverage)

➤ 2. Option B

♦ How Option B differs from current benefit offerings ♦

1. Option B contains the same features as Option A, with the exception of the monthly premium cost-share. Like Option A, the HMO plans cost-share is 100% / 0% for single + 90% / 10% for dependent; however, what is different is the PPO plans cost-share in Option B is 90% / 10% for single coverage, and 75% / 25% for dependent coverage.

4. For Your Consideration: 2026 Employee Benefits Options

We have the following proposed benefits plan options to share with the board:

➤ 3. Additional Benefits Plan Options that can be included with Option A or Option B:

- Employer Covers 100% Dental/Vision premiums, and/or
- Employer HSA Contributions, and/or
- Voluntary Term Life Insurance (see Appendix H for rates), and/or
- Retain the existing PPO plan alongside the new plan options.

4. For Your Consideration: 2026 Employee Benefits Options

Option A Annual Costs

DESCRIPTION	EMPLOYEE COSTS	LIBRARY COST	TOTAL COST
Option A Annual Costs	\$144,531.57	\$856,991.60	\$1,001,523.17

INCLUDES THE FOLLOWING:



- 3 PPO (BCO1, BCO2, HDHP w/ HSA)
- 2 HMO
- Dental
- Vision

COVERAGE DETAILS:

- 100% coverage for HMO single
- 90%/10% cost-share for PPO single employee & HMO dependent coverage
- 80%/20% cost-share for PPO dependent coverage

4. For Your Consideration: 2026 Employee Benefits Options

Option B Annual Costs

DESCRIPTION	EMPLOYEE COSTS	LIBRARY COST	TOTAL COST
Option B Annual Costs	\$167,307.81	\$834,215.36	\$1,001,523.17

INCLUDES THE FOLLOWING:

-  3 PPO (BCO1, BCO2, HDHP w/ HSA)
-  2 HMO
-  Dental
-  Vision

COVERAGE DETAILS:

- 100% coverage for HMO single
- 90%/10% cost-share for PPO single employee & HMO dependent coverage
- 75%/25% cost-share for PPO dependent coverage

4. For Your Consideration: 2026 Employee Benefits Options

ADDITIONAL PLAN OPTIONS: ENHANCEMENTS & VOLUNTARY BENEFITS

Health Savings Account (HSA)



Employer Contributions:

- **\$1,000** for single
- **\$2,000** for employee + spouse or employee + children
- **\$4,000** for family

100% Dental & Vision Coverage



Add **\$6,648** to
cover 100% of
premiums

Voluntary Term Life Insurance



100% Employee Premium:

Cost varies by
employee age &
amount of coverage

Current PPO + New Options



Add between
\$40,000 - \$60,000
annually

5. Evaluating 2026 Benefit Options: Cost-Benefit & Value Assessment

5. Evaluating 2026 Benefit Options: Cost-Benefit & Value Assessment

- Methodology: For both Option A and Option B, the following assumptions were made in the benefits data analysis:
 - 1. All current PPO plan participants were moved over to the highest cost PPO plan (the BC01 PPO) in their existing levels of coverage (single, single + spouse, single + child(ren), and family).
 - 2. All current HMO plan participants maintained the same level of coverage and plan types.
 - 3. The 3 employees who decline health insurance were enrolled in the BC01 PPO with single coverage; The 3 employees who decline dental are enrolled in **single dental**; the 8 employees who decline vision are enrolled in **single vision**.

5. Evaluating 2026 Benefit Options: Cost-Benefit & Value Assessment

✓ Let's turn to the "Monthly Costs" hand-out

⇒ Features: Detailed breakdown of monthly employee cost, library cost, and total cost of monthly insurance premiums, based on benefits enrollment assumptions (see previous slide for details).

✓ Next, we look at the "Total Annual Costs" hand-out

⇒ Features: Builds upon the "Monthly Costs" by forecasting an annualized estimate of the employee, library, and total costs of the respective benefit options.

✓ Finally, please refer to "Total Annual Costs Projections" hand-out

⇒ Features: 5 year annual cost projections at both 5% and 10% for current benefits, Option A, Option B, & the library covering Dental/Vision premiums at 100%.

6. Next Steps

6. Next Steps

- Finalize Plan Design: The Board must vote at either January or February meeting. The library must finalize all plan designs by March 14, 2026, for the new plan year starting July 1.
- Monitor Renewal Rates: We will review preliminary IPBC renewal rates as soon as they are available in March 2026.
- Begin Staff Education: If Option A or B is approved in January, we can begin staff education to ensure everyone understands their options.
- Simplify Open Enrollment: We are evaluating a future move to January 1 Open Enrollment to align with our FSA cycle and simplify planning for staff.

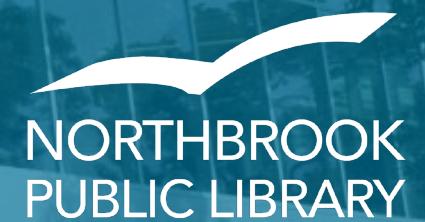
7. Appendix

7. Appendix

- Appendix A: Compensation Philosophy and Strategy
- Appendix B: Current Northbrook Public Library Insurance Rates Sheet
- Appendix C: Current Northbrook Public Library Benefits Summary
(Health, Dental, and Vision Plans)
- Appendix D: Peer Library Employee Benefits Comparison Data
- Appendix E: From IPBC – Proposed Plan Designs for Health Insurance Plans,
(Effective July 2026)
- Appendix F: 2025 IPBC Benefits Benchmarking Study
- Appendix G: Staff Survey Results
- Appendix H: Voluntary Term Life Insurance Rates and Information



Thank You!



Total Annual Costs

Current Annual Costs

Includes the following:

1 PPO

2 HMO

Dental

Vision

90%/10% coverage for single employee

80%/20% coverage for dependent coverage

Employee Costs	Library Cost	Total Cost
\$159,490.78	\$899,068.10	\$1,058,558.88

Option A Annual Costs

Includes the following:

2 PPO

2 HMO

1 HDHP

Dental

Vision

100% coverage for HMO single

90%/10% coverage for PPO single employee &
HMO dependent

80%/20% coverage for PPO dependent coverage

Employee Costs	Library Cost	Total Cost
\$144,531.57	\$856,991.60	\$1,001,523.17

Option B Annual Costs

Includes the following:

2 PPO

2 HMO

1 HDHP

Dental

Vision

100% coverage for HMO single

90%/10% coverage for PPO single employee &
HMO dependent coverage

75%/25% coverage for PPO dependent coverage

Employee Costs	Library Cost	Total Cost
\$167,307.81	\$834,215.36	\$1,001,523.17

Additional Plan Options

Costs Overview

HSA

Employer Contributions

\$1,000 for single

\$2,000 for employee + spouse or employee + children

\$4,000 for family

Dental Vision Coverage at 100%

Add \$6,648 to cover 100% of premiums

100% Employee Premium:

Cost Varies by Employee Age &

Amount of Coverage

Add between \$40,000 - \$60,000 annually

Voluntary Term Life Insurance

Current PPO + New Options

Monthly Costs

Current Monthly Costs				
	Employee Cost	Library Cost	Total Cost	
PPO	Employee	\$117.085	\$1,053.77	\$1,170.85
	Employee + Spouse	505.554	\$2,022.22	\$2,527.77
	Employee + Children	480.276	\$1,921.10	\$2,401.38
	Family	695.134	\$2,780.54	\$3,475.67
HMO 1	Employee	\$69.07	\$621.59	\$690.66
	Employee + Spouse	\$311.65	\$1,246.58	\$1,558.23
	Employee + Children	\$296.06	\$1,184.23	\$1,480.29
	Family	\$406.33	\$1,625.34	\$2,031.67
HMO 2	Employee	\$71.12	\$640.12	\$711.24
	Employee + Spouse	\$320.93	\$1,283.72	\$1,604.65
	Employee + Children	\$304.88	\$1,219.51	\$1,524.39
	Family	\$418.44	\$1,673.76	\$2,092.20
Dental	Employee	\$3.66	\$32.98	\$36.64
	Family	\$21.58	\$86.31	\$107.89
Vision	Employee	\$0.55	\$4.92	\$5.47
	Employee + Spouse	\$2.13	\$8.53	\$10.66
	Employee + Children	\$2.28	\$9.11	\$11.39
	Family	\$3.64	\$14.57	\$18.21

Option A Monthly Costs				
	Employee Cost	Library Cost	Total Cost	
PPO 1	Employee	\$111.82	\$1,006.35	\$1,118.16
	Employee + Spouse	\$482.80	\$1,931.22	\$2,414.02
	Employee + Children	\$458.66	\$1,834.65	\$2,293.32
	Family	\$663.85	\$2,655.41	\$3,319.26
PPO 2	Employee	\$108.50	\$976.52	\$1,085.03
	Employee + Spouse	\$468.50	\$1,873.99	\$2,342.48
	Employee + Children	\$445.07	\$1,780.29	\$2,225.36
	Family	\$644.18	\$2,576.72	\$3,220.90
HMO 1	Employee	\$0.00	\$676.64	\$676.64
	Employee + Spouse	\$152.66	\$1,373.94	\$1,526.60
	Employee + Children	\$145.02	\$1,305.22	\$1,450.24
	Family	\$236.41	\$2,127.65	\$2,364.05
HMO 2	Employee	\$0.00	\$696.52	\$696.52
	Employee + Spouse	\$157.14	\$1,414.29	\$1,571.43
	Employee + Children	\$149.28	\$1,343.55	\$1,492.84
	Family	\$204.89	\$1,844.00	\$2,048.89
HDHP	Employee	\$102.57	\$923.10	\$1,025.66
	Employee + Spouse	\$442.87	\$1,771.46	\$2,214.33
	Employee + Children	\$420.72	\$1,682.89	\$2,103.61
	Family	\$608.94	\$2,435.75	\$3,044.69
Dental	Employee	\$3.66	\$32.98	\$36.64
	Family	\$21.58	\$86.31	\$107.89
Vision	Employee	\$0.55	\$4.92	\$5.47
	Employee + Spouse	\$2.13	\$8.53	\$10.66
	Employee + Children	\$2.28	\$9.11	\$11.39
	Family	\$3.64	\$14.57	\$18.21

Option B Monthly Costs				
	Employee Cost	Library Cost	Total Cost	
PPO 1	Employee	\$111.82	\$1,006.35	\$1,118.16
	Employee + Spouse	\$603.51	\$1,810.52	\$2,414.02
	Employee + Children	\$573.33	\$1,719.99	\$2,293.32
	Family	\$829.82	\$2,489.45	\$3,319.26
PPO 2	Employee	\$108.50	\$976.52	\$1,085.03
	Employee + Spouse	\$585.62	\$1,756.86	\$2,342.48
	Employee + Children	\$556.34	\$1,669.02	\$2,225.36
	Family	\$805.23	\$2,415.68	\$3,220.90
HMO 1	Employee	\$0.00	\$676.64	\$676.64
	Employee + Spouse	\$152.66	\$1,373.94	\$1,526.60
	Employee + Children	\$145.02	\$1,305.22	\$1,450.24
	Family	\$236.41	\$2,127.65	\$2,364.05
HMO 2	Employee	\$0.00	\$696.52	\$696.52
	Employee + Spouse	\$157.14	\$1,414.29	\$1,571.43
	Employee + Children	\$149.28	\$1,343.55	\$1,492.84
	Family	\$204.89	\$1,844.00	\$2,048.89
HDHP	Employee	\$102.57	\$923.10	\$1,025.66
	Employee + Spouse	\$553.58	\$1,660.74	\$2,214.33
	Employee + Children	\$525.90	\$1,577.71	\$2,103.61
	Family	\$761.17	\$2,283.52	\$3,044.69
Dental	Employee	\$3.66	\$32.98	\$36.64
	Family	\$26.97	\$80.92	\$107.89
Vision	Employee	\$0.55	\$4.92	\$5.47
	Employee + Spouse	\$2.67	\$8.00	\$10.66
	Employee + Children	\$2.85	\$8.54	\$11.39
	Family	\$4.55	\$13.66	\$18.21

Option to Cover 100% of Employee Premiums				
	Employee Cost	Library Cost	Total Cost	
Dental	Employee	\$0.00	\$36.64	\$36.64
	Family	\$0.00	\$107.89	\$107.89
Vision	Employee	\$0.00	\$5.47	\$5.47
	Employee + Spouse	\$0.00	\$10.66	\$10.66
	Employee + Children	\$0.00	\$11.39	\$11.39
	Family	\$0.00	\$18.21	\$18.21

Option to Cover 100% of Employee Premiums				
	Employee Cost	Library Cost	Total Cost	
Dental	Employee	\$0.00	\$36.64	\$36.64
	Family	\$0.00	\$107.89	\$107.89
Vision	Employee	\$0.00	\$5.47	\$5.47
	Employee + Spouse	\$0.00	\$10.66	\$10.66
	Employee + Children	\$0.00	\$11.39	\$11.39
	Family	\$0.00	\$18.21	\$18.21

Annual Costs Overview

Total Annual Costs

Current Annual Costs

	Employee Cost	Library Cost	Total Cost
PPO			
28 Employee	\$39,340.56	\$354,065.04	\$393,405.60
6 Employee + Spouse	\$32,854.68	\$149,144.76	\$181,999.44
3 Employee + Children	\$15,289.83	\$71,159.85	\$86,449.68
5 Family	\$41,597.40	\$166,942.80	\$208,540.20
HMO (2 plans)			
6 Employee	\$5,071.54	\$45,643.82	\$50,715.36
1 Employee + Spouse	\$3,431.50	\$15,267.26	\$18,698.76
0 Employee + Children	\$0.00	\$0.00	\$0.00
3 Family	\$14,989.10	\$60,330.10	\$75,319.20
Dental			
34 Employee	\$1,494.91	\$13,454.21	\$14,949.12
18 Family	\$4,638.92	\$18,665.32	\$23,304.24
Vision			
34 Employee	\$223.18	\$2,008.58	\$2,231.76
10 Employee + Spouse	\$221.34	\$1,057.86	\$1,279.20
1 Employee + Children	\$24.32	\$112.36	\$136.68
7 Family	\$313.49	\$1,216.15	\$1,529.64
TOTAL	\$159,490.78	\$899,068.10	\$1,058,558.88

Option A Annual Costs

	Employee Cost	Library Cost	Total Cost
PPO (2 Plans)			
28 Employee	\$37,570.23	\$338,132.11	\$375,702.35
6 Employee + Spouse	\$34,761.89	\$139,047.57	\$173,809.47
3 Employee + Children	\$16,511.89	\$66,047.56	\$82,559.44
5 Family	\$39,831.18	\$159,324.71	\$199,155.89
HMO (2 plans)			
6 Employee	\$0.00	\$34,786.11	\$34,786.11
1 Employee + Spouse	\$1,831.92	\$16,487.26	\$18,319.18
0 Employee + Children	\$0.00	\$0.00	\$0.00
3 Family	\$7,376.01	\$66,384.08	\$73,760.09
HDHP			
0 Employee	N/A	N/A	N/A
0 Employee + Spouse	N/A	N/A	N/A
0 Employee + Children	N/A	N/A	N/A
0 Family	N/A	N/A	N/A
Dental			
34 Employee	\$1,494.91	\$13,454.21	\$14,949.12

Annual Costs Overview

18 Family	\$4,660.85	\$18,643.39	\$23,304.24
Vision			
34 Employee	\$223.18	\$2,008.58	\$2,231.76
10 Employee + Spouse	\$255.84	\$1,023.36	\$1,279.20
1 Employee + Children	\$13.67	\$123.01	\$136.68
7 Family	\$0.00	\$1,529.64	\$1,529.64
TOTAL	\$144,531.57	\$856,991.60	\$1,001,523.17

Additional Plan Options

HSA	\$0.00	\$0.00
Dental Vision Coverage at 100%	\$0.00	\$6,648.00
Voluntary Term Life Insurance	TBD	\$0.00

Option B Annual Costs

	75/25		
PPO (2 Plans)		Employee Cost	Library Cost
28 Employee		\$37,570.23	\$338,132.11
6 Employee + Spouse		\$43,452.37	\$130,357.10
3 Employee + Children		\$20,639.86	\$61,919.58
5 Family		\$49,788.97	\$149,366.92
HMO (2 plans)			Total Cost
6 Employee		\$0.00	\$34,786.11
1 Employee + Spouse		\$1,831.92	\$16,487.26
0 Employee + Children		\$0.00	\$0.00
3 Family		\$7,376.01	\$66,384.08
HDHP			\$73,760.09
0 Employee		N/A	N/A
0 Employee + Spouse		N/A	N/A
0 Employee + Children		N/A	N/A
0 Family		N/A	N/A
Dental			
34 Employee		\$1,494.91	\$13,454.21
18 Family		\$4,660.85	\$23,304.24
Vision			
34 Employee		\$223.18	\$2,231.76
10 Employee + Spouse		\$255.84	\$1,023.36
1 Employee + Children		\$13.67	\$123.01
7 Family		\$0.00	\$1,529.64
TOTAL	\$167,307.81	\$834,215.36	\$1,001,523.17

Additional Plan Options

HSA	\$0.00	\$0.00	\$0.00
Dental Vision Coverage at 100%	\$0.00	\$6,648.00	\$6,648.00
Voluntary Term Life Insurance	TBD	\$0.00	\$0.00

Total Annual Costs 5% Annual Increase

Assumes a 5% increase annually

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL COSTS for 6 YEARS
	2026-2027	2027-2028	2028-2029	2029-2030	2030-2031	2031-2032	
Current Annual Costs							
Employee Costs	\$159,490.78	\$167,465.31	\$175,838.58	\$184,630.51	\$193,862.04	\$203,555.14	\$1,084,842.35
Library Cost	\$899,068.10	\$944,021.51	\$991,222.58	\$1,040,783.71	\$1,092,822.90	\$1,147,464.04	\$6,115,382.86
Total Cost	\$1,058,558.88	\$1,111,486.82	\$1,167,061.17	\$1,225,414.22	\$1,286,684.93	\$1,351,019.18	\$7,200,225.21

**Option A Annual Costs**

Employee Costs	\$144,531.57	\$151,758.14	\$159,346.05	\$167,313.35	\$175,679.02	\$184,462.97	\$963,091.11	\$101,751.24 Employee Total Cost Savings
Library Cost	\$856,991.60	\$899,441.18	\$944,833.24	\$992,074.90	\$1,041,678.60	\$1,093,762.58	\$5,829,882.16	\$286,200.70 Library Total Cost Savings
Total Cost	\$1,001,523.17	\$1,051,599.33	\$1,104,179.29	\$1,159,388.26	\$1,217,357.67	\$1,278,225.55	\$6,812,273.26	

Option B Annual Costs

Employee Costs	\$167,307.81	\$175,673.20	\$184,456.86	\$193,679.70	\$203,363.87	\$213,531.87	\$1,138,013.11	-\$53,170.75 Employee Total Cost Increase
Library Cost	\$834,215.36	\$875,926.13	\$919,722.44	\$965,708.56	\$1,013,993.99	\$1,064,693.69	\$5,674,860.16	\$441,122.70 Library Total Cost Savings
Total Cost	\$1,001,523.17	\$1,051,599.33	\$1,104,179.29	\$1,159,388.26	\$1,217,357.67	\$1,278,225.55	\$6,812,273.26	

Dental Vision Coverage at 100%

Total Additional Cost	\$6,648.00	\$6,980.40	\$7,328.42	\$7,695.89	\$8,080.69	\$8,484.72	\$45,219.12	Library Total Cost Increase
-----------------------	------------	------------	------------	------------	------------	------------	-------------	-----------------------------

Total Annual Costs 10% Annual Increase

Assumes a 10% increase annually

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL COSTS for 6 YEARS
	2026-2027	2027-2028	2028-2029	2029-2030	2030-2031	2031-2032	
Current Annual Costs							
Employee Costs	\$159,490.78	\$175,439.85	\$192,983.84	\$212,282.22	\$233,510.45	\$256,861.49	\$1,230,568.63
Library Cost	\$899,068.10	\$968,874.91	\$1,087,872.41	\$1,196,659.65	\$1,316,325.61	\$1,447,958.17	\$6,956,858.85
Total Cost	\$1,058,558.88	\$1,164,414.77	\$1,280,856.24	\$1,408,941.87	\$1,549,636.06	\$1,704,819.66	\$6,817,427.48

Option A Annual Costs

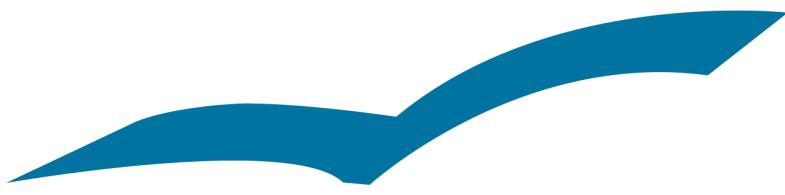
Employee Costs	\$144,531.57	\$158,884.72	\$174,883.19	\$192,371.51	\$211,608.67	\$232,769.53	\$1,115,149.19	\$115,419.43 Employee Total Cost Savings
Library Cost	\$856,991.60	\$942,690.76	\$1,038,959.84	\$1,140,655.82	\$1,254,721.40	\$1,380,193.54	\$6,612,212.97	\$324,645.88 Library Total Cost Savings
Total Cost	\$1,001,523.17	\$1,101,675.48	\$1,211,843.03	\$1,333,027.34	\$1,466,330.07	\$1,612,963.08	\$7,727,382.17	

Option B Annual Costs

Employee Costs	\$167,307.81	\$184,038.59	\$202,442.44	\$222,686.69	\$244,955.36	\$269,450.89	\$1,290,881.78	-\$60,313.15 Employee Total Cost Increase
Library Cost	\$834,215.36	\$917,836.90	\$1,009,400.59	\$1,110,340.65	\$1,221,374.71	\$1,343,512.18	\$6,436,480.39	\$500,378.47 Library Total Cost Savings
Total Cost	\$1,001,523.17	\$1,101,675.48	\$1,211,843.03	\$1,333,027.34	\$1,466,330.07	\$1,612,963.08	\$7,727,382.17	

Dental Vision Coverage at 100%

Total Additional Cost	\$6,648.00	\$7,312.80	\$8,044.08	\$8,848.49	\$9,733.34	\$10,706.67	\$51,293.38	Library Total Cost Increase
-----------------------	------------	------------	------------	------------	------------	-------------	-------------	-----------------------------



NORTHBROOK PUBLIC LIBRARY

Equity, Diversity & Inclusion Survey Findings and Report

2025

**2023 - 2025 Progress Report and
Recommendations for Future Action**

Zheng Consulting

Lily Zheng
Alexis Victor

January 2026

Introduction and 2025 Report Overview

This report by Zheng Consulting summarizes the key findings of the 2025 EDI Follow-Up Survey, Northbrook Public Library's EDI-related progress since the 2023 Baseline EDI Survey, and recommendations for Northbrook to most effectively continue its progress toward achieving its EDI goals in 2026 and beyond. This report is organized into several sections.

Page 2: **Introduction and 2025 Report Overview**

Pages 3-6: **2023 - 2025 EDI Progress Report**

Pages 7-9: **Recommendations for Action**

Page 9: **Conclusion**

Pages 10-17: **Appendix and Additional Findings**

What Is EDI?

Equity, Diversity, and Inclusion, or EDI, refers to a broad set of initiatives that organizations use to better meet the needs of all of their workers, customers, patrons, and/or other stakeholders. Zheng Consulting defines the terms as follows: **Equity** work refers to internal policy or process improvements to eliminate favoritism, bias, and discrimination, and ensure fair treatment for all. **Diversity** work refers to improvements to workforce composition and core offerings or services to reflect the wide range of community (e.g., patron) needs. **Inclusion** work refers to improvements in the culture and practices of an organization so that all staff and patrons feel valued, respected, and safe for who they are.

Methodology

Zheng Consulting designed and administered the 2025 EDI survey in late September 2025 through CultureAmp to learn how EDI at the library has changed since 2023, and compared the library's 2025 scores with an external benchmark for the Information Services sector, as well as its 2023 EDI Survey and 2024 quarterly Pulse Survey scores. The response rate for the 2025 EDI survey was 66%, significantly lower than the 90% response rate in 2023. To reduce the influence of bias in the data from this lower response rate, Zheng Consulting conducted ten additional follow-up interviews with a wide range of staff, including some who did not complete the survey. While we are confident in our findings, we encourage readers of this report to be mindful of the possibility that quantitative survey scores only show one part of the bigger picture, and may not accurately reflect the full reality of all people's experiences.

2023- 2025 EDI Progress Report

Strategic Efforts Since 2023

In 2023, Zheng Consulting reported on the findings of the Baseline EDI Survey it designed for the Northbrook Public Library, noting that staff experienced low capacity for EDI work, were drained from over-sscoped projects, and were frustrated by poorly-defined or lacking feedback, decision-making, and accountability processes. We recommended the library:

- Pause library-wide projects that were draining staff capacity
- Formalize decision-making roles for staff, managers, and leadership
- Invest in management, communication, and feedback upskilling for leadership
- Redistribute EDI workstreams toward HR and managers
- Organize and engage in regular dialogue with peer institutions

Since the delivery of the 2023 report, we have worked closely with the Northbrook Public Library to follow through on these recommendations. This work has included:

- Advising on the library's strategic plan alongside Fast Forward Libraries and input from staff, leadership, and trustees
- Advising on the requirements and expectations for the HR Director hired in May 2024
- Working closely with the EDI committee to redefine its mission, support staff wellness, and prevent staff burnout from EDI work
- Supporting and advising the HR Director, Becky Moore, to develop sustainable surveying and analysis capacity for the library as Zheng Consulting transitions out
- Providing resources and guidance for leadership and department managers related to conflict management, communication, feedback, and EDI best practices
- Holding leadership accountable for their commitments with regular check-ins

Following a qualitative survey administered by Zheng Consulting in April 2025, leadership committed to several follow-up actions and initiatives, including:

- Improving "post-mortem" communications on how staff feedback impacts decision-making, like the selection of the Technical Services department manager
- Modeling healthy feedback norms, active listening practices, and verbal responses to submissions to the anonymous staff feedback form during all-staff meetings
- Pushing decision-making down towards managers and staff by reassigning lines of supervision, improving coordination of inter-department tasks, and training department managers to more effectively facilitate meetings and departmental tasks

The results of the 2025 EDI Survey reflect the measurable impact from these efforts, identifying both the initiatives that succeeded as well as those deserving further attention.

EDI Improvements

Empowered by exceptional managers, library staff have become even more motivated on the job — and increasingly see the library as a great place to work.

Staff scores on motivation at work and their evaluation of the library as a great place to work both rose, driven by substantial improvements in the library's already-strong management. Staff now report feeling more confident making everyday decisions within their jobs, safe sharing feedback with their manager, and valued for their unique contributions. As an impressive note, the staff motivation score in 2025, 90 out of 100, puts the library 22 points above the Information Services 2025 industry benchmark.

Fair access to opportunity has improved to an industry-leading level.

87% of staff indicated that when career opportunities became available at the library, they were aware of them, an increase of 10 points from 2023. This score now places the library 25 points above the Information Services 2025 benchmark, making this score the most prominent example of the Northbrook Public Library's industry leadership. Staff recognized the positive impact of sharing open roles via email, though some wondered if every role was truly open to all staff (as opposed to being created specifically for one person).

Staff widely perceive EDI as less performative and more genuine, approving of the library's continued programs and its handling of tough community situations.

The largest improvement has been in staff perception that the library's operations and external communications on EDI are consistent: from 55% in 2023 to 77% in 2025, 15 points above industry benchmark. Staff shared that the continued variety of programming and the effective handling of the *Israelism* room booking incident indicated the library's commitment to its values. From this progress, we conclude that the library has improved from an organization seen by staff as largely performative in its commitment to EDI to an organization that, while imperfect, is increasingly practicing what it preaches.

Staff experience across departments has become remarkably more consistent, a nuanced but strong indication of equity-related progress.

In 2023, Zheng Consulting found that variation *between departments*, rather than staff demographics, was the largest source of inequity. In 2025, this inequity was reduced by half, speaking to greater consistency and fairness in how staff are treated across departments, the effectiveness of strengthened HR processes and policies across the library, and more effective everyday leadership from department managers.

Partial Progress and Lingering Challenges

Workloads have become more fair, though many staff are still overwhelmed.

Staff perception of fair workloads has improved substantially from 44% in 2023 to 68% in 2025, as managers and leadership have become more effective in concisely sharing information when communicating tasks. Widespread burnout in 2023 has lessened, though staff across departments indicated that work was still not always distributed fairly. Potential reasons may include passionate or motivated staff taking on more work, and managers hesitating to set stronger expectations with staff who may be less productive. In 2025, full-time staff, especially managers and members of leadership, are the most likely to still indicate that their workloads each week are too much to manage.

Project timeliness has improved, but a fundamental disconnect still exists between staff and managers/leadership.

Staff evaluation of library-wide project timeliness has improved from 23% in 2023 to 57% in 2025, but with a wide gap in perception between full-time staff and managers/leadership, with full-time staff having a much lower evaluation. This likely reflects a misalignment of expectations, a disconnect between staff experiences and manager awareness, or both. In comments, staff expressed confusion and frustration over why some projects faced long delays while others seemed to be fast-tracked.

Information-sharing has improved, but opaque and unresponsive communication practices surrounding feedback continue to undermine staff engagement.

Only 44% of staff feel like their perspectives are included in library-wide decisions, a virtually unchanged score from 2023. Staff still lack understanding of how their feedback affects decision-making, or which decisions are truly able to be influenced (as opposed to being set in stone or outside the library's control). One exception was the recent decision to not combine Circulation and Technical Services, which staff approved of for being conducted respectfully and shaped by two-way conversation with staff.

Conflict avoidance, particularly when it comes to library-wide decisions, continues to compromise effective communication and feedback between staff and leadership.

Only 52% of staff agreed that leadership engages effectively with staff during situations of disagreement or conflict — 22 points lower than the Information Services benchmark. While some staff report seeing constructive dialogue when sharing feedback, other staff reported perceived punishment or beratement in response to disagreement. Altogether, these factors contribute to only 65% of staff feeling respected and valued by leadership, a score that is roughly unchanged since 2023. We are concerned that this distrust undermines staff engagement in crucial feedback processes, including the EDI Survey.

New Concerns

Misunderstanding of EDI among staff and patrons may be undermining EDI work, resulting in harm to historically marginalized communities, and risking public backlash.

Tokenism is when an individual is spotlighted as a representative of entire groups of people. It can also refer to surface-level EDI practices that are extrapolated to conclude widespread EDI progress. While well-intentioned, current staff understanding of EDI is disconnected from their day-to-day work and often reflects tokenistic beliefs. Few staff could speak to examples of EDI work, yet multiple comments cited the presence of people of color or LGBTQ+ people on staff as “proof of EDI,” while others expressed the belief that EDI was about preferential treatment for historically marginalized groups. These inaccurate ideas may inadvertently steer the library towards performative practices that burden staff from historically marginalized backgrounds, are misaligned with the needs of the community, and increase the risk of misunderstandings with patrons. Relatedly, less than 50% of staff outside of Administration and Youth Services feel that patrons understand how the library’s support for EDI relates to its mission, with comments stating that the library’s external approach to EDI is “blunt,” “heavy-handed,” and “isn’t resonating.”

Community EDI needs have shifted considerably from the early 2020s and present a growing tension.

Staff comments noted a growing tension between investing in more representative events and collections even if they may not reflect the needs of the community, and directly meeting the needs of the community — which may not always be aligned with greater equity, diversity, and inclusion. Comments mentioned that patron conflict linked to the library’s collections and events is increasingly disruptive given the tense political climate.

Staff note a new inequity rooted in outstanding work being recognized no differently from the bare minimum, though aren’t aligned on how to solve for it.

One of the only scores to fall between 2023 and 2025 was perception of being evaluated fairly, falling from 75 in 2023 to 68 in 2025. Staff indicated instances where some individuals would be nudged into taking up more work while other colleagues would be given more latitude, and expressed frustration that performance was not consistently measured, nor tied to additional rewards even if measured well. Related, the perception of fairness in total compensation stayed consistent from 60 in 2023 to 61 in 2025, despite the completion of the pay equity audit. Lingering low scores may be linked to the perceived irrelevance of actual on-the-job performance — and the belief that staff who go above and beyond are rewarded (whether in the form of compensation, learning and development, access to opportunity, or other means) no more than staff who stick to what is expected.

Recommendations for Action

While the library is making progress on EDI, it is ready to evolve its approach to go beyond surface-level activities and isolated initiatives.

The survey showed that staff highly valued the idea of a more equitable, diverse, and inclusive library but struggled to define or measure these terms, gauging success through *lagging indicators* like the presence of EDI-related activity or staff from historically marginalized communities. EDI work tended to fall on the small number of staff from historically marginalized communities, or volunteer committees, rather than being broadly distributed across the library. In 2025, the library has the opportunity to go further by connecting its EDI efforts to its core mission to serve the community, promote lifelong learning, and protect intellectual freedom, and deepen its efforts to achieve equity, diversity, and inclusion for patrons, staff, and the community. To reach this next stage of maturity in its EDI efforts, we strongly recommend the library:

- Hold internal conversations to:
 - Create a working definition of equity tied to its processes and policies. Ask: "How do we eliminate favoritism/discrimination?" "How do we ensure *all* staff are set up for success?" "How do we ensure all patrons are treated fairly?"
 - Create a working definition of diversity tied to its workforce and offerings. Ask: "How are we bringing in great talent, wherever it may lie?" "How do we ensure our patrons feel represented by our staff and offerings?"
 - Create a working definition of inclusion tied to its internal culture. Ask: "How do we ensure that all staff and patrons feel safe, respected, and valued for who they are?" "What shared practices can help everyone to thrive at work?"
- Collaboratively create measurable goals related to each of these areas for long-term accountability, and initiatives to achieve them distributed across departments.
- Through 2026, experiment with distributing EDI-related work (e.g., heritage month displays, suggesting new authors to add to collections) across departments.
- Update job descriptions, role responsibilities, and evaluation criteria for all staff and managers, including library leadership, to reflect new expectations by 2027.
- Invest in learning and development, including training managers to offer organic coaching on the job and EDI-related growth opportunities for motivated staff members, to better integrate EDI work across all staff roles by 2027.

These efforts are the first steps to shift the work of EDI from isolated events and efforts toward everyday work embedded into daily operations at the library. The goal is to have fairness and inclusion woven into how HR implements policies and processes, how managers engage with their teams, how staff engage with patrons and their daily work, how leadership makes decisions, and how the library as a whole engages with the public.

The library should establish strong feedback norms, supporting them with learning and development opportunities focused on productive conflict and healthy feedback.

The library's continued challenges with psychological safety, two-way communication, respect, and trust between staff and leadership indicate the need for more comprehensive efforts than what has been tried. We recommend that library leadership, then department managers, begin modeling the [Five R's of Feedback](#) (Request, Receive, Reflect, Respond, Resolve) with a specific focus on *Request*. Rather than making "available" the possibility of feedback, leadership should actively invite feedback on key decisions, including anonymously. We also recommend the library invest in learning and development opportunities for all staff to gain skills in giving and receiving more *direct* feedback (for example, using the Situation-Behavior-Impact ([SBI](#)) model of communication) and engage in healthier conflict. The goal is to create a feedback-rich and less conflict-averse culture where feedback is organically shared upwards from staff to managers to leadership, offered in the form of coaching and development from leadership to managers to staff, and actively solicited by decision-makers on the department and library-wide levels.

As the library continues standardizing library-wide policies and decision-making processes, it should stay mindful of department- and role-specific nuances.

While these have improved substantially, inconsistent policies, informal influence, and unclear performance expectations continue to present challenges to the fair and inclusive environment the library aspires to. Standardizing policies (e.g., remote work), clearly communicating performance expectations, and clarifying decision-making roles will continue to contribute to fair allocation of recognition, workload, and opportunities. However, throughout the process staff may experience disruptions or changes to their typical experience (for example, if an exception to a library-wide rule for a department is removed, staff in that department may reasonably feel as if their experience has changed for the worse). As changes are made, we encourage decision-makers to consider fairness not as a one-size-fits-all, but as a commitment to maintaining a high standard of experience across different departments — and to be constantly thinking about how to improve staff experiences, patron satisfaction, and library efficacy over the long run.

The library should maintain EDI momentum through regular pulse surveys owned by HR linked to active EDI initiatives, in partnership with the EDI committee.

After the conclusion of Zheng Consulting engagement with the library, we recommend that the HR Director continue to regularly survey staff using smaller pulse surveys tied to active EDI initiatives, whether through the CultureAmp platform or otherwise. While we recommend this work be led and carried out by HR, HR decision-makers should regularly communicate and consult with the EDI committee (e.g., for feedback on survey questions and transparency). The results of each year's EDI work can be summarized in an annual report to staff and potentially the public, for accountability.

Library leadership should focus heavily on improving the transparency of their communications, especially around decision-making.

[Transparency in decision-making](#) requires communicating about decisions well before the decision is made. We recommend that for the vast majority of open-ended decisions, leadership share information as far in advance as possible, outline the process for making the decision, solicit feedback, and make it clear what aspects of the decision might be shaped by staff feedback and which are not. In the rare cases when decisions are almost entirely out of the library's control, or if challenges arise, we recommend that leadership communicate so clearly and promptly. Particularly when the results of said decisions may negatively impact staff, we strongly recommend that leadership openly discuss these impacts and how they can be mitigated, rather than attempting to "focus on the positives." Finally, when soliciting feedback for library-wide decisions, we strongly encourage decision-makers to more clearly communicate when decisions are truly open-ended and when they are, to delay voicing their individual opinions until preliminary feedback from all staff has been collected.

Conclusion

The library has made enormous progress on EDI since 2023, particularly in closing the gap between intentions and impact with its external-facing work. As it heads into 2026, a volatile political climate challenges it to ensure its EDI work meets the expectations of its staff, patrons, and community. The library's staff, as was true in 2023, are its strongest asset. Retaining and developing staff through fair and equitable processes, consistent decision making that puts people first, and building a culture that values everybody for who they are — that is to say, *EDI* — will ensure the library's continued success. It has been an honor working with the library on this leg of its journey, and we are confident it can continue delivering the progress its staff and patrons deserve.

Zheng Consulting

Lily Zheng
Alexis Victor

Appendix

This section contains more findings from the 2025 Follow Up EDI Survey and Zheng Consulting's analysis.

2025 EDI Follow-Up Survey Overview

This section lists the Northbrook Public Library's scores on the 2025 EDI Follow-Up survey. Survey questions were organized by nine different factors, as follows:

Belonging: The degree to which people feel valued, respected, and safe taking risks.

Voice: The degree to which people feel safe offering feedback and feel it is taken seriously.

Fairness: The degree to which people feel equally treated and evaluated.

Enablement: The degree to which people feel supported to succeed in their jobs.

Decision Making: The degree to which people feel included in decisions impacting them.

Representation: The degree to which people feel their workplace reflects their community.

Leadership: The degree to which leaders are ensuring a well-functioning workplace.

Engagement: The degree to which people feel positively toward and participate in the workplace.

Community: The degree to which people feel supported in interacting with patrons.

Green bars on the right indicate the magnitude of factor improvement since 2023.

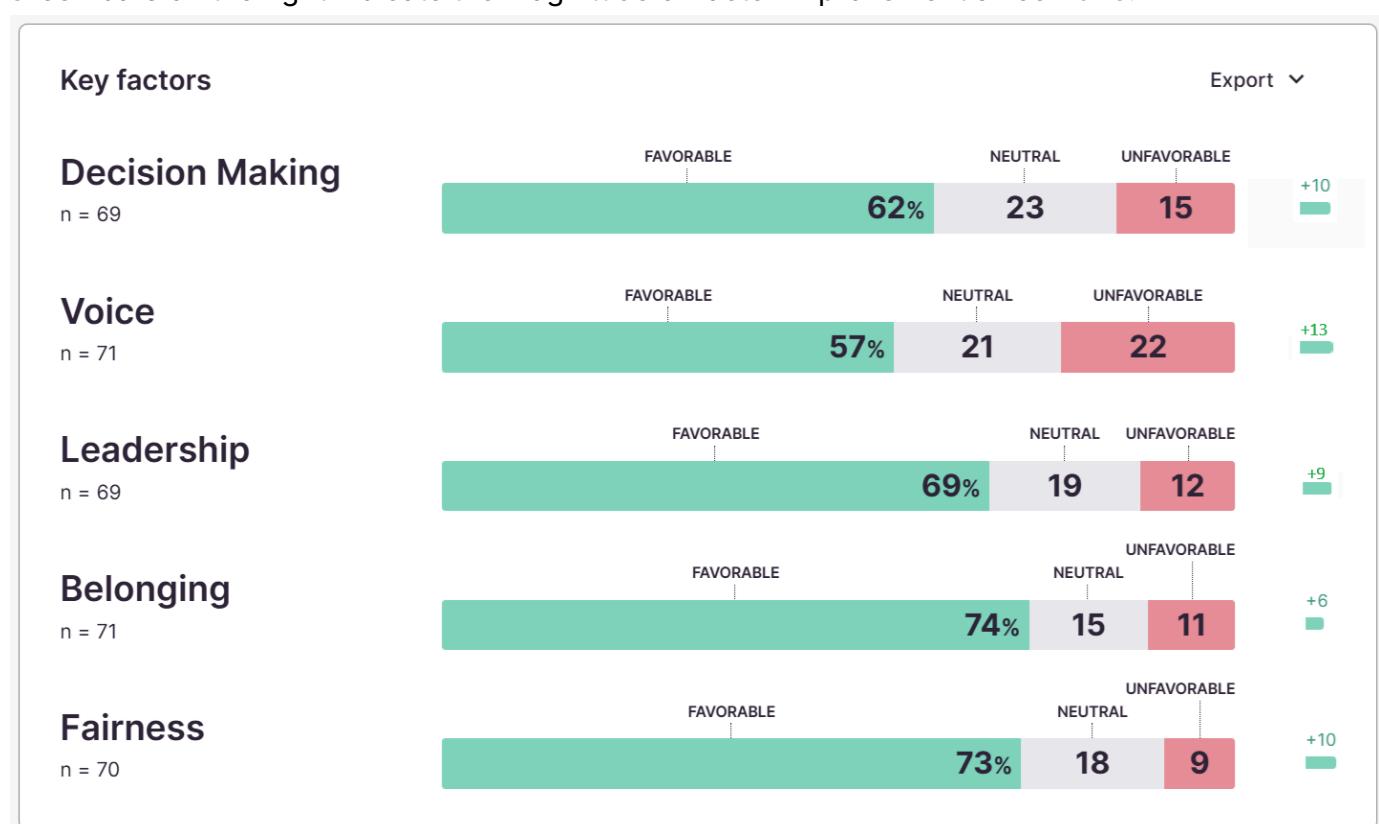


Figure 1. An overview of survey factors and their scores on the 2025 EDI Survey: Decision-Making (62%, +10), Voice (57%, +13), Leadership (69%, +9), Belonging (74%, +6), and Fairness (73%, +10).



Figure 2. An overview of the remaining survey factors and their scores on the 2025 EDI Survey: Engagement (71%, +13), Enablement (85%, +2), Community (74%, +12), and Representation (67% favorable, no comparison).

Taken together, this overview shows that the library has essentially improved on nearly all survey factors compared to its scores in 2023. No comparison exists for Representation, since the 2025 survey items within Representation were modified following feedback that the original questions were confusing. Many of the library's baseline already showed strong signs of improvement after the first pulse surveys, suggesting that its 2023 scores may have been a low outlier. To fully understand how the library has improved over time, we looked more closely at each survey question individually and compared the library's scores with CultureAmp's 2025 Information Services benchmark. Where applicable, we have also included anonymized staff comments to contextualize the scores.

Outperforming Scores

Outperforming scores show where the library is doing better than industry average. The library most outperformed the Information Services 2025 benchmark on the following:

25 Points Above: "When there are career opportunities at the library, I am aware of them."



22 Points Above: "I am motivated to do my best working here."



"You see very competent people working hard and it helps motivate you to work hard as well."

15 Points Above: "The library's external stances and support for equity, diversity, and inclusion are aligned with its internal operations."



14 Points Above: "I feel valued for the unique contributions I can make to the library."



"I feel very valued in terms of how I am spoken about, but it doesn't translate to compensation."

12 Points Above: "I have access to the resources, tools, and info I need to do my job well."



10 Points Above: "I would recommend the NPL as a great place to work."



10 Points Above: "I believe that my compensation is fair, relative to similar staff roles here."

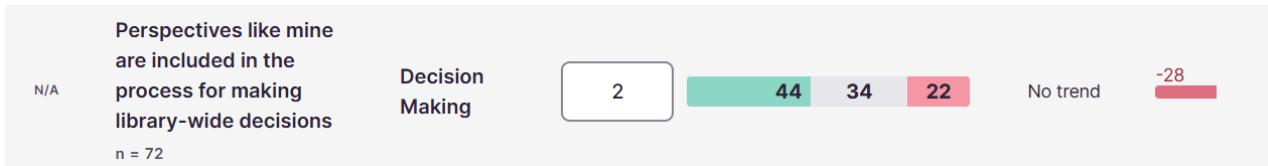


Some of these scores reflect the library's effectiveness in enabling access to opportunity, while others reflect the drive and motivation of well-supported library staff. Some, like the score for fairness of total compensation, reflect the library's relative outperformance on a question that scores poorly across the industry.

Underperforming Scores

Outperforming scores show where the library is doing worse than industry average. The library most underperformed the Information Services 2025 benchmark on the following:

-28 "Perspectives like mine are included in the process for making library-wide decisions."



"Leadership sometimes makes decisions without consideration for impact on staff."

-26 "I am able to freely speak about the identities/experiences that matter to me at work."



-24 "There is open and honest two-way communication between staff and leadership."



"I think we need to work on authenticity and leveling with one another."

-22 "In situations of disagreement or conflict, I feel library leadership engages effectively with staff."



"Frustration and tension are very human and understandable feelings, but leadership needs to find ways to process conflict (both within their team and the overall library) in a healthy way because they are the role models whether staff admit it or not. When they are anxious and avoidant, it seeps down to us and it is hard for us to feel at peace."

-16 "I can voice a contrary opinion with library leadership without fear of negative consequences"



"Even if I felt that I could voice a contrary opinion to leadership now, I wouldn't because of past negative experiences."

-13 "Library leadership communicates decisions clearly and in a timely manner."



The areas with the largest negative gaps relate to decision-making, psychological safety, and belonging. Despite improved communication (e.g., meeting notes shared in a timely fashion), staff still feel excluded from organizational decisions, and share a sense that decision-making happens "at the top," without meaningful consultation with staff. Leadership is perceived as distant, unresponsive in disagreements, and only symbolically listening to feedback. Consistent across these areas is a trend where staff experiences tend to worsen after 2 years, revealing a crucial opportunity to make strong improvements.

Overall Northbrook Public Library	<12 months	1-2 years	10+ years	2-5 years	5-10 years
Responses	73	14	5	23	11
Decision Making	62%	75	100	56	55
Fairness	73%	74	100	75	64
Voice	57%	73	100	55	39
Community	74%	79	100	74	66
Enablement	85%	93	100	86	77
Belonging	74%	79	100	73	70
Leadership	69%	77	100	69	53
Engagement	85%	88	93	88	76
Representation	67%	75	100	74	50

Figure 3. A table showing overall survey scores, by tenure. Staff working at the library for <12 months and 1-2 years have markedly higher scores than staff who have been at the library for longer periods of time.

Largest EDI Challenges

EDI looks at the differences in experiences across groups, not only in *social identity* categories like race, gender, and age, but also in *organizational* categories like tenure, department, and whether a person is a manager or not. By comparing the differences between the highest-scoring and lowest-scoring groups within a demographic (for example, men's versus women's scores) we can get a sense for what issues to prioritize. This analysis compares the largest EDI challenges in 2025 with the largest EDI challenges in 2023. A red up arrow shows that the challenge has *worsened* between 2023 and 2025. A green down arrow shows that the challenge has *eased* or *improved* between 2023 and 2025.

Priority	2025 Challenge	Inequity	2023 Challenge	Inequity
1	Tenure	38.1 pts ↑	Department	47.8 pts
2	Age (<i>Linked w/ Tenure</i>)	36.1 pts ↑	Race	31.8 pts
3	Department	24.4 pts ↓	Staff/Mgr/Leadership	31.6 pts
4	Hybrid/In-person	17.2 pts ↑	Age	25.9 pts
5	Staff/Mgr/Leadership	17.1 pts ↓	LGBTQ+	17.8 pts
	Race	No data*		

Figure 4. Demographic factors, ranked by their impact on inequity at the NPL.

What does this mean? First, this chart shows that between 2023 and 2025, department inequity reduced substantially from roughly 48 points to a little over 24 points. This means that staff experience between departments became more consistent, likely as the result of consistent management practices and greater HR support. Inequality between manager and non-manager staff also reduced substantially, from 32 points to 17. The closing of this gap is both due to non-manager staff experience improving, and manager staff experience worsening due to heavy workloads. Of note as well is a new inequity that may be emerging, of staff who work hybrid (with a remote option) having substantially *worse* experiences than staff who work in-person only.

Tenure (and age) have become far more predictive of inequity, linked to the wide gap in more positive experiences for newer staff and staff under 25, versus worse experiences for more tenured staff, who tend to be older. We find this inequity concerning, especially given the lower engagement with the 2025 survey. Unless long-standing concerns raised by more tenured staff are addressed, challenges are likely to linger.

Finally, we are unable to assess whether racial inequity worsened or improved — due to an insufficient number of survey respondents choosing not to share their race in 2025. As it was a high-priority issue in 2023, we advise proceeding as if this is still true in 2025.

Staff Survey Feedback

Staff shared many direct suggestions in the survey for how to improve equity, diversity, and inclusion at the library. While staff definitions of EDI varied widely and some suggestions contradicted each other, many suggestions were similarly focused on better empowering staff, removing perceived barriers, and supporting the library's patron- and community-focused mission. Staff feedback was closely considered when creating the recommendations in this report, with a collection of individual suggestions and comments included below:

- Directly connect the library's EDI work to the needs of patrons and the community, to increase patron understanding and engagement with EDI
- Adding 1 week of staff's budgeted hours to the personal time or annual vacation accrual to address burnout and improve wellness
- Offer more opportunities for professional development throughout the workday
- Pause AI implementation until pilots demonstrate that it improves service quality
- Train staff and managers on how to navigate conflict more directly and productively
- Communicate not only the results of decisions, but *why* and *how* those decisions were made to improve transparency and trust in decision-making processes
- Present the results of the pay equity audit more visibly and in-depth to increase staff understanding of how the audit was conducted
- Improve board understanding and awareness of library staff experiences and library activity, potentially by showcasing library events during board meetings
- Audit the library's collections to ensure they are representative of the community's demographics
- Consider not only social demographics like race and gender in data analysis, but job metrics like job duties and time off to identify potential inequities
- Publicize clear-cut goals and directions the library is taking, showcasing progress to help focus staff and improve the library's relationship with the community
- Include multiple copies of new releases from underrepresented authors
- Look into expanding options for flexible working arrangements (e.g., remote work) for all staff



Zheng Consulting 2025 EDI Assessment Board Presentation

Key Findings and Recommendations

LILY ZHENG
DEI Strategist

ALEXIS VICTOR
DEI Consultant

Today's Goals

1. To come away with a strong understanding of the 2025 EDI Survey findings, report, and recommendations, and its implications for the library
2. To set clear expectations for what comes next through the remainder of ZC's engagement with the NPL

LILY ZHENG
(they/them)

FAIR Strategist
Consultant
Author

@lilyzheng308
 lilyzheng.co





ALEXIS VICTOR
(she/they)

Associate DEI
Consultant

assessments@lilyzheng.co

SESSION **ROADMAP**

1. How Did We Get Here?

1. Where Are We Now?

2. What Comes Next?

3. Q&A and Discussion

A photograph of a terracotta planter containing small, spiky plants. A white plastic shovel is stuck into the soil in the planter. The planter is placed on a bed of small, light-colored gravel. In the background, there are various other plants and a building with a tiled roof.

Shared Expectations:

- 1. **“Yes, And”**
- 1. **Validate All Experiences**
- 1. **Solve Problems, Not People**
- 1. **Participate in Any Form**

1

How Did We Get Here?

A recap on what's
happened since the
2023 report.



First: What is EDI?

Equity: well-designed policies, processes, and practices that eliminate favoritism, bias, and discrimination and ensure fairness for all.

Diversity: a demographic composition *and* external offerings that reflect everyone's needs for representation, from staff to patrons.

Inclusion: shared norms and expectations that ensure that everyone feels valued, respected, and safe for who they are.

Since 2023, Zheng Consulting...

- Contributed to development of the Strategic Plan
- Advised on the hiring of the HR Director
- Guided the rescoping of the EDI Committee
- Supported internal pulse survey development
- Administered external respect, value, and safety survey and recommendations
- Offered conflict management, communication, and EDI guidance to managers and leadership
- Provided external accountability through regular leadership check-ins

**The role of the 2025 EDI Survey
was to learn what's been
working since 2023 — and
what's not.**



Survey Factors

Decision Making Enablement

Fairness

Voice

Belonging

Leadership

Engagement

Community

Representation

2

Where Are We Now?

The key findings and
recommendations from
the 2025 EDI Follow Up
Assessment



A close-up photograph of a hand pouring dark coffee from a French press into a white ceramic cup. The cup is positioned in the center, with steam rising from the hot coffee. The background is dark and out of focus.

WHAT IMPROVED

**Staff Motivation Is
Supercharged By
Exceptional Managers**



WHAT IMPROVED

**Access to Opportunity
is at Industry-Leading
Levels**



WHAT IMPROVED

**EDI Commitment Seen
As More Genuine After
a Tough Year**



WHAT IMPROVED

**Staff Experience Is
Increasingly Consistent
Across Departments**

A photograph of a shipping container terminal. In the foreground, a red forklift is positioned between stacks of shipping containers. The containers are stacked high, creating a grid-like pattern. The colors of the containers vary, including blue, red, and white. The sky is overcast with some clouds. The text 'WORK IN PROGRESS' is overlaid on the image.

WORK IN PROGRESS

**Workloads More Fair,
Though Many Still
Overwhelmed**



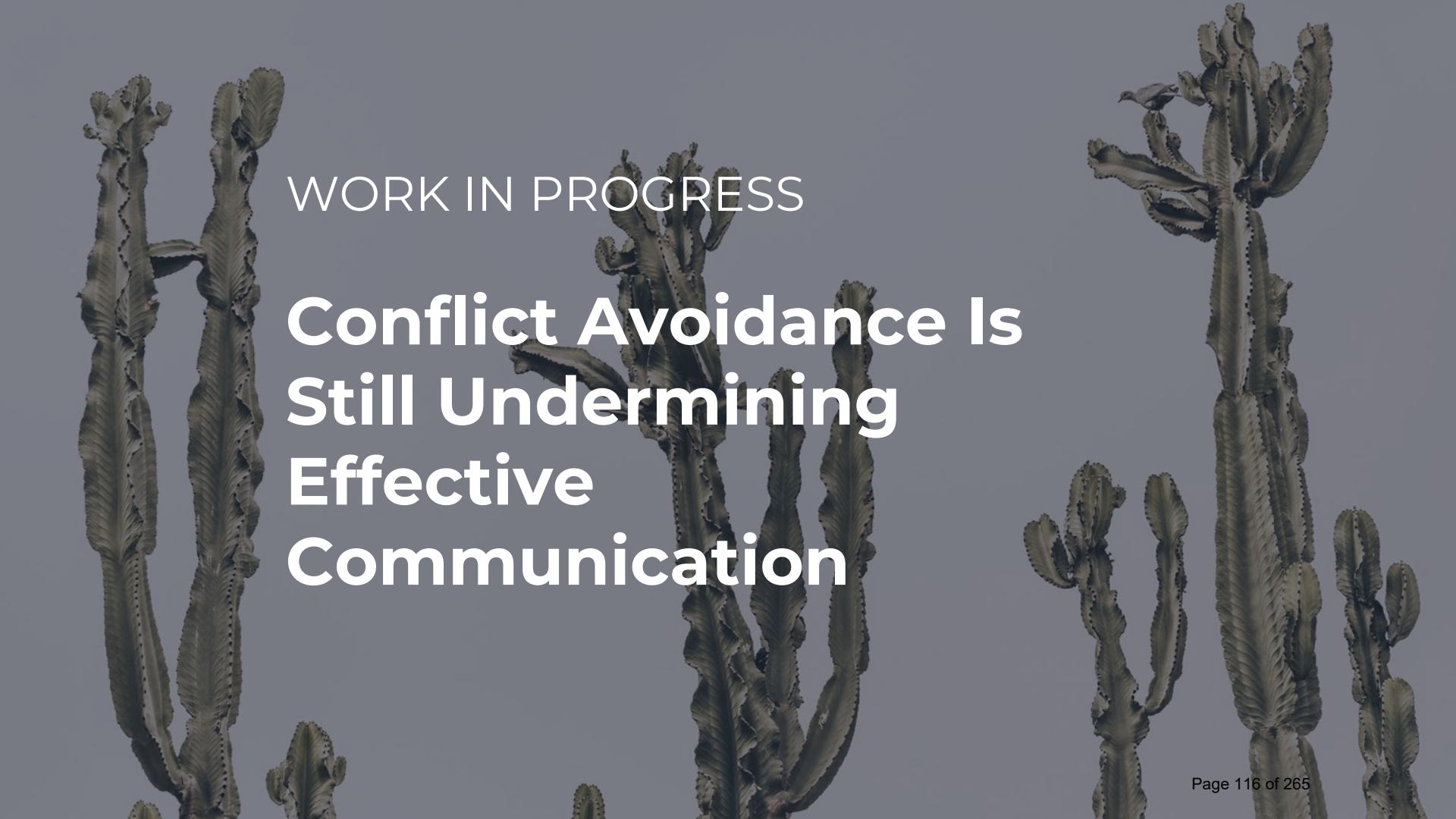
WORK IN PROGRESS

**Staff and Managers
are Disconnected Over
Project Timeliness**



WORK IN PROGRESS

**Staff Are More
Informed, But Don't
Believe Their Feedback
Matters**



WORK IN PROGRESS

Conflict Avoidance Is Still Undermining Effective Communication



NEW EDI CONCERNS

**In Tense Times, EDI Is
Misunderstood By Both
Patrons and Staff**



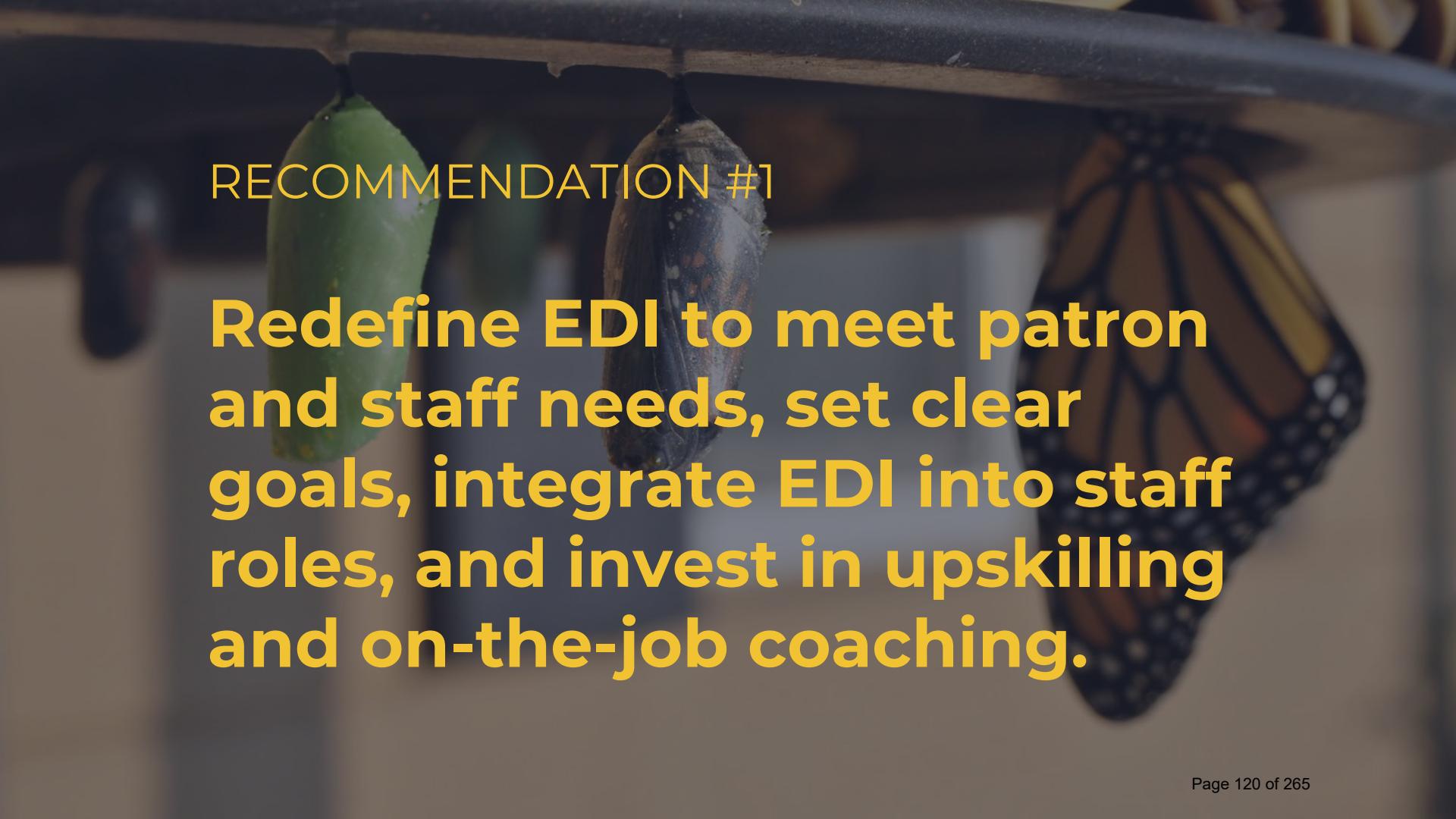
NEW EDI CONCERNS

Community Needs and Perspectives on EDI Are Changing

A close-up photograph of a small, vibrant green plant with several leaves sprouting from a piece of weathered, brown wood. The background is blurred, showing more of the same natural setting.

NEW EDI CONCERNS

**Staff Want to Be Better
Rewarded For Going
Above and Beyond**



RECOMMENDATION #1

Redefine EDI to meet patron and staff needs, set clear goals, integrate EDI into staff roles, and invest in upskilling and on-the-job coaching.



RECOMMENDATION #2

Build skills in direct feedback and productive conflict, starting from leadership requesting more feedback.

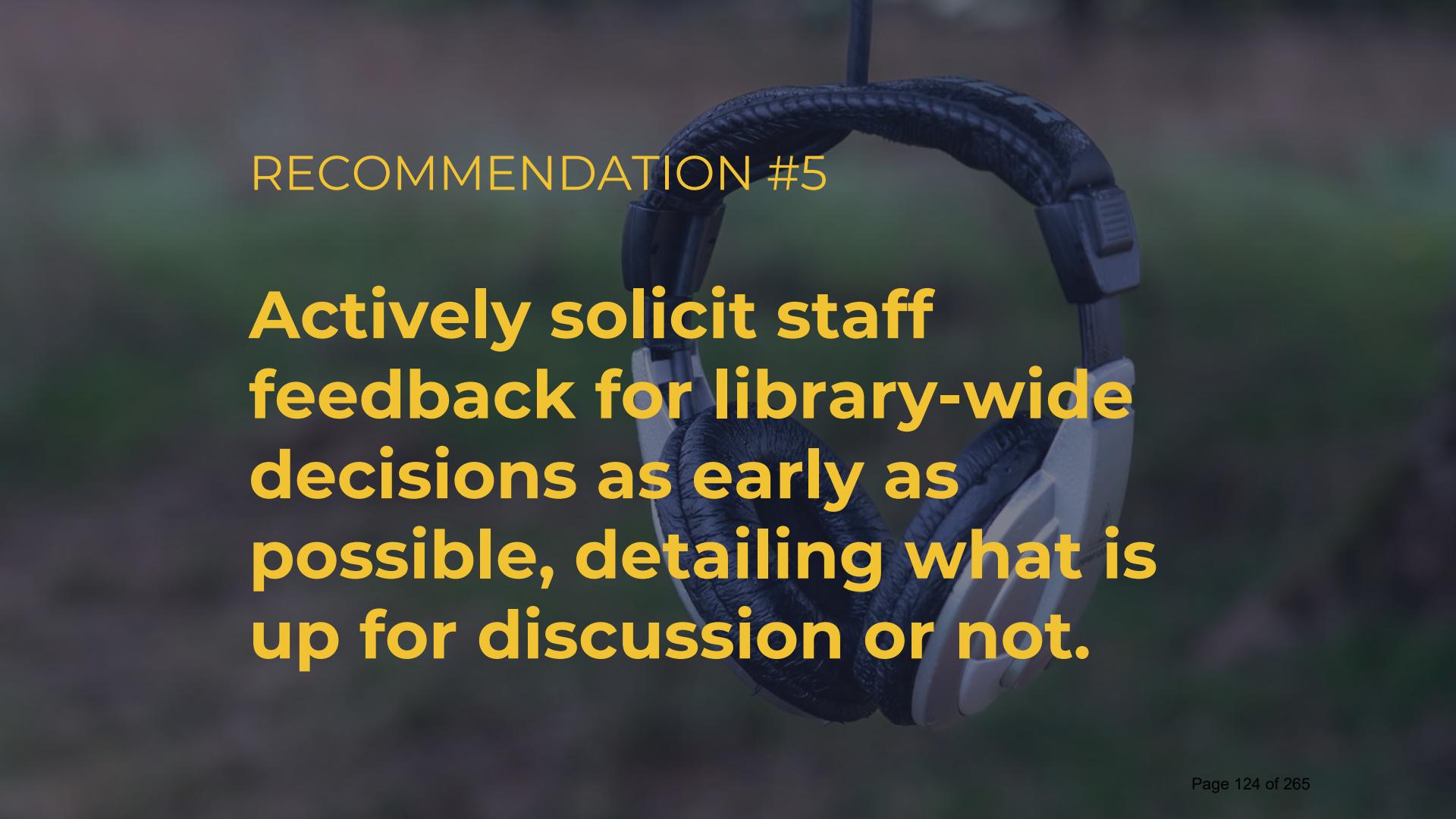


RECOMMENDATION #3

**Partner HR with
Department Managers to
ensure fair policies and
processes get designed
and applied mindfully.**

RECOMMENDATION #4

Led by HR, continue utilizing pulse surveys tied to specific EDI initiatives to maintain accountability.



RECOMMENDATION #5

Actively solicit staff feedback for library-wide decisions as early as possible, detailing what is up for discussion or not.

3

What Comes Next?

What the next few months
will involve.



Tailored Briefs

Every department manager and the leadership team has received a customized brief with their department's/team's overall scores on the survey factors, alongside recommendations for what areas to consider focusing on with staff. Zheng Consulting has recommended that these briefs be the launching point for productive discussion and improvements within departments and for the library at large, and will be available for support or guidance as needed.

Follow-Up and Handoff

As the library continues to discuss and process the findings and recommendations from the 2025 survey, Zheng Consulting will be available for strategic guidance and discussion facilitation throughout the first half of 2026. Our goal with providing support is to ensure the library builds sufficient capacity to continue this work on its own, as we wind down our engagement as described in our original proposal from 2023 (how time flies!).



Thank you's and acknowledgements

4

Q&A

What questions do you have
for us?



WHAT IMPROVED

- **Staff Motivation Is Supercharged By Exceptional Managers**
- **Access to Opportunity is at Industry-Leading Levels**
- **EDI Commitment Seen As More Genuine After a Tough Year**
- **Staff Experience Is Increasingly Consistent Across Departments**

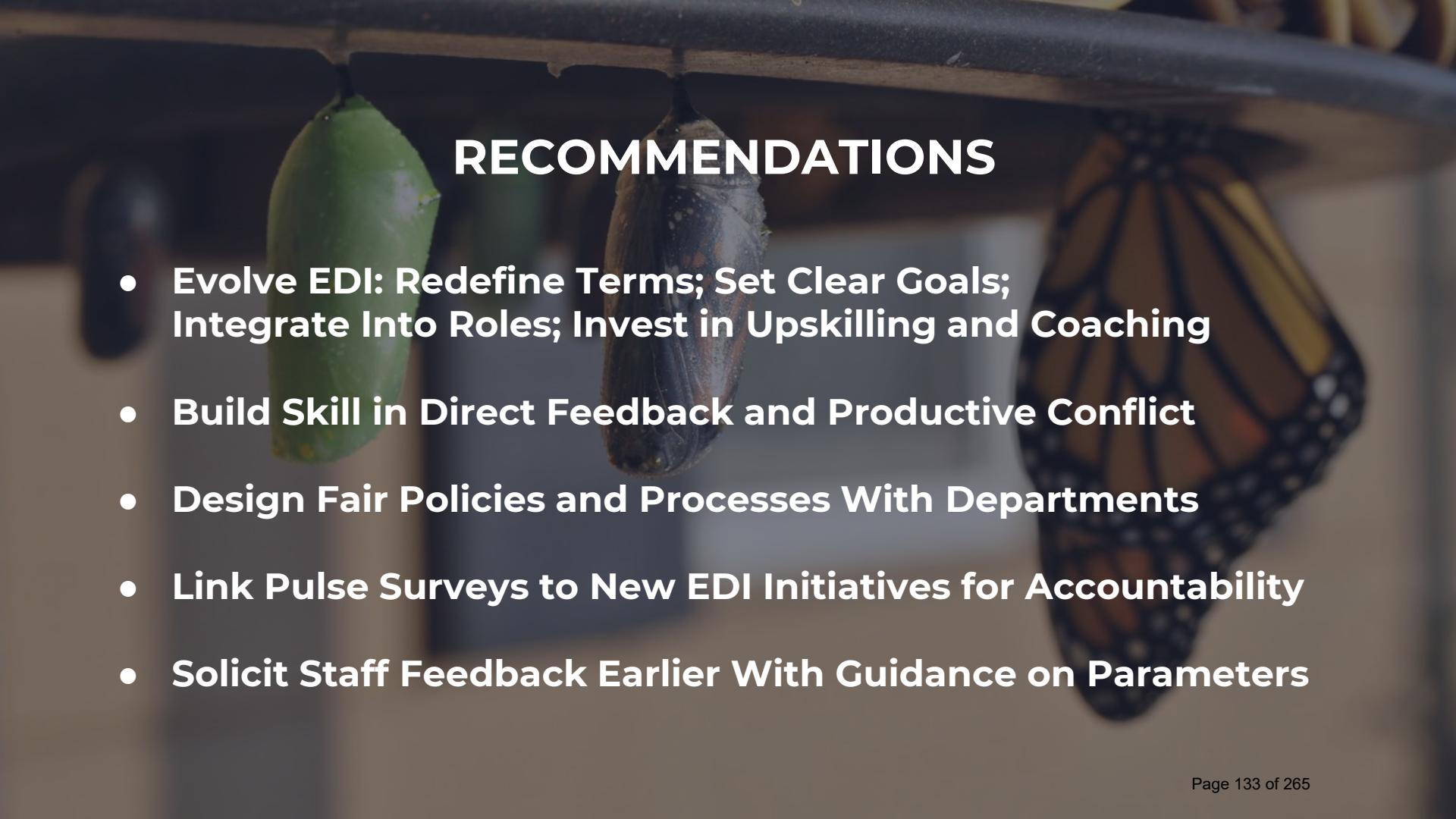
A large stack of shipping containers in a port, with a red forklift truck visible in the foreground.

WORKS IN PROGRESS

- **Workloads More Fair, Though Many Still Overwhelmed**
- **Staff and Managers are Disconnected Over Project Timeliness**
- **Staff Are More Informed, But Don't Believe Their Feedback Matters**
- **Conflict Avoidance Is Still Undermining Effective Communication**

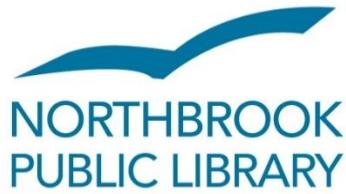
NEW EDI CHALLENGES

- **In Tense Times, EDI Is Misunderstood By Both Patrons and Staff**
- **Community Needs and Perspectives on EDI Are Changing**
- **Staff Want to Be Better Rewarded For Going Above and Beyond**

A close-up photograph of a monarch butterfly's chrysalis, which is dark brown with gold spots, hanging from a branch. To the left, a bright green lime is partially visible. The background is a warm, out-of-focus orange and yellow.

RECOMMENDATIONS

- **Evolve EDI: Redefine Terms; Set Clear Goals; Integrate Into Roles; Invest in Upskilling and Coaching**
- **Build Skill in Direct Feedback and Productive Conflict**
- **Design Fair Policies and Processes With Departments**
- **Link Pulse Surveys to New EDI Initiatives for Accountability**
- **Solicit Staff Feedback Earlier With Guidance on Parameters**



Memorandum

DATE: January 2, 2025

TO: Board of Trustees

FROM: Kate Hall, Executive Director, and Anna Amen, Finance & Operations Director

RE: Master Plan Timeline & Next Steps

As discussed previously, we recommend redoing the 2017 Master Plan before proceeding with remaining projects. Work on the plan was paused in 2021, and since that time, significant operational, financial, and usage changes warrant updating to ensure the plan still aligns with current needs and realities.

Key changes since the Master Plan was adopted include:

- Construction costs have risen substantially over the past three years, making total project costs likely higher than originally projected, even with a 4% annual inflation adjustment.
- Reference and Fiction & Media have merged into a single Adult Services department, with staff now split across three locations on two floors and covering two service desks.
- A new Events Production department has been established, with staff primarily located on the 3rd floor while supporting programming in the Auditorium.
- Patron use patterns have shifted, with increased daytime study room use and greater demand from families for interactive and passive engagement opportunities.

- Adult Services has successfully hosted photo and other exhibits—typically on the 2nd floor in space designated for Teen/Tween use in the Master Plan—which have been well received by the community.

There are six remaining Master Plan projects, currently estimated at approximately \$7.4 million. Funds are allocated annually to the facility plan, and the Library has continued to build the Capital Improvement Fund (CIF) with the goal of minimizing or avoiding the need for bonding.

A proposed timeline for the remaining work from design to construction is included in the board packet. At a high level:

- Pre-Design (Jan–Sept 2026): Needs assessment, staff and community engagement, site analysis, and confirmation of scope, budget, and operational requirements.
- Design (Sept 2026–Sept 2027): Development of detailed architectural plans, specifications, and compliance review; space-level decisions such as furniture and shelving are finalized.
- Bidding (Sept–Nov 2027): Solicitation and board approval of the lowest responsible bidder.
- Procurement & Permitting (Nov 2027–Jan 2028): Contract execution, permitting, and ordering of long-lead items.
- Construction (Jan 2028–Jan 2029): Phased construction, with sequencing to be determined.
- Move-In & Reopening (Jan–Mar 2029): Final inspections, punch list completion, and return of staff and collections.

We are seeking board guidance on the following:

- Any concerns with the proposed timeline or overall approach
- Any major considerations or omissions the board believes should be addressed before proceeding
- Preferred level of board involvement in the project:

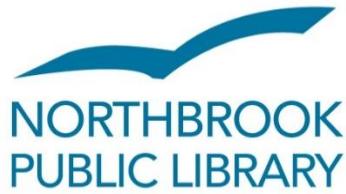
- Board Committee Model: A standing committee partners with staff throughout all project phases. Meetings would primarily occur in the evenings and may include architects as needed.
- Board Liaison Model: One or two board members work closely with staff, attend meetings with the architect and construction manager, and report back to the full board. Daytime availability is required.
- Strategic Oversight Model: Staff provides regular updates at board meetings, with the board focused on major approvals (e.g., bid packages, significant expenditures), supplemented by milestone-specific meetings as needed.

I look forward to discussing this project with the board and getting started on moving forward.

Phase	Estimated Duration	Start	End	Description
Pre-Design	120	1/1/2026	9/17/2026	This is the foundational phase where we conduct a comprehensive needs assessment to determine what spaces and functions are required, engage with staff and community stakeholders to gather input, and perform site analysis to understand existing conditions and constraints. During this phase, we also establish the project budget, timeline, and any special requirements for the library's operations.
Design	365	9/17/2026	9/17/2027	This is the planning phase where architects work with us to take the master plan concepts and create detailed drawings and specifications for the construction project ensuring compliance with zoning laws, building codes, accessibility and safety regulations. This is where we get into the details for each space like furniture, shelving, etc.
Bid	60	9/20/2027	11/19/2027	In this phase, we solicit bids from construction companies to complete the project based on the approved design. The lowest responsible bidder is then approved by the board.
Procurement	45-60	11/19/2027	1/18/2028	After the lowest responsible bidder is approved by the board, we enter into contracts and start procuring items for the project. This also includes getting permitting.
Construction	365	1/18/2028	1/17/2029	This is the actual building phase where the chosen contractor carries out the work according to the approved plans. We will likely do construction in phases but that is still being determined.
Move In	45	1/17/2029	3/3/2029	The final phase where, after we have conducted final inspections and completed any open items, the renovated space is ready to reopen and staff and collections are moved back in.

Google Drive Folder: https://drive.google.com/drive/folders/1mzbSxdWusQekggsDjtvu9igQ7LkmJKAh?usp=drive_link

Action	Business Days until Board Meeting
Board Master Plan Discussion	
All Staff Meeting Master Plan Update	
Staff Survey and Data Collection	
Department-by-Department Staff Engagement (Phase 1)	
Staff Feedback Analysis	
Space Utilization Analysis	
Community Input: UX/ Focus Groups/ Heat Mapping Analysis	
Board Information Session	
Master Plan Updating with Architects	
Research Report and Presentation	
Preliminary Budget Development	
Staff Buy-In Sessions (Phase 2)	
Board Presentation of Report & Draft Design	
Master Plan Updating with Architects	
Board Approval of Master Plan	
Schematic Design Phase	
Community Feedback of Schematic Design	
Staff Review & Feedback of Schematic Design	
Board Approval of Schematic Design	
Cost Estimating - Design Development	
Staff Review of Design Development	
Board Review of Design Development	
Architect Drawings for bid documents	
Library Review of IT, FFE, and MEP Drawings	
Attorney & Construction Manager Review of Architect Drawing	
Library planning for construction and offsite or reduced service needs	
Board Review of Final Design Development	0
Start compiling bid package draft	67
Draft bid package due	62
Send package to attorney	61
IT Review of Bid package	61
Attorney review complete	51
IT Review complete	51
Finalize bid package	49
Send bid notice to paper	48
Bid released - paper & website	46
Mandatory Walkthrough (if applicable)	41
Last Day for Questions / RFI to architects	36
Answers to Questions/RFI from architect to contractors - posted on website	33
Bid opening	27
Bid review begins	24
IT Review of bids begins	
Recommendation and info due for Board packet	13
Board packet materials finalized	7
Board packet created	6
Board meeting / Board reviews and approves	0
Contract Permitting Submittals - 6 to 8 weeks	
Construction Start	
Weekly Staff Updates on Construction Progress	
OAC Meetings	
Phase 1 Construction	



Memorandum

DATE: January 2, 2025

TO: Board of Trustees

FROM: Kate Hall, Executive Director, and Anna Amen, Finance & Operations Director

RE: Master Plan Space Audit

As part of the update to the master plan and next steps in moving forward with this work, we need to gather additional data. As I have mentioned, usage patterns have changed in the past 5 years as a result of COVID and the data we had previously used in the 2017 Master Plan is no longer useful.

Best practices in space design recommend doing user research and space audits to help make informed decisions. We have asked David Vinjamuri from ThirdWay Space to recommend services that will help give us data to make informed decisions in our planning processes. We asked him to provide all the options so the board can choose the level of feedback and research we would like to do.

In addition to these specific projects, David can additionally work with architects on the library's behalf to ensure that anything we learn from any research undertaken and the strategic space guidance agreed on in the space audit process inform the design and construction phases.

Option A Comprehensive Space Evaluation (\$52,000-\$62,000)

- Do a UX Study or Focus group interviews
- Do a Heat Mapping Test
- Conduct a Space Audit that analyzes layout and spacing needs for collections and patron seating.
- Wayfinding Plan which is part of the strategic plan and will guide the use of signage in the ThirdWay will do a signage audit and new signage and layout.

Option B Core Space Evaluation (\$32,000)

- Conduct a Space Audit that analyzes layout and spacing needs for collections and patron seating.
- Wayfinding Plan which is part of the strategic plan and will guide the use of signage in the ThirdWay will do a signage audit and new signage and layout.

Option C Minimal Feedback (\$0)

- Do not move forward with any space evaluation with Third Way Space and use data we currently have in the data dashboard and from patron comments in the design process



Space Evaluation Options: Northbrook Public Library

Summary:

ThirdWay recommends five tasks to understand and improve the Northbrook Public Library space:

1. **User Experience (UX) Study** – Understand the experience of navigating and using the library from the patron's point of view with first-person video and uncover core usability issues.

or ...

2. **Community Partner Interviews** – coordinate a series of up to 10 focus groups with municipal, non-profit and community-based partners around community needs, each focused on a specific group such as seniors, at-risk teens, non-English speakers, patrons with disabilities, etc. Develop a series of patron insights and refine these into space-oriented objectives for the design team.

plus ...

3. **Heat Mapping/Visual Display Test** – Map the circulation effectiveness of all shelving and display spaces for the existing collection. Optimize visual display in a genre-based marketplace and throughout the library and measure the impact of these changes on circulation.
4. **Wayfinding Plan** – Create a new wayfinding system for the Northbrook public library using a taxonomy including distinctive size, shape, color, font and position for different signage types. Create a "brand book" of signage, Canva templates and distinctive environmental graphics for wayfinding. Assist the library in sourcing fabrication for new signage.
5. **Space Audits** – Evaluate the library for space effectiveness and propose new zone layouts for the library.
6. **Staff Training** – Train staff on basic space concepts and visual display techniques to improve collection circulation and ensure that the library

ThirdWay can additionally work with architects on the library's behalf to ensure that the patron learnings from any research undertaken and the strategic space guidance agreed on in the space audit process are carried through the design and construction of renovated library space.

Because of the intensive travel schedule of the ThirdWay principal, time must be booked in half- or full day increments rather than by the hour.

There are two ways to engage ThirdWay for this assistance:

1. **Retainer** – The library reserves non-refundable time in advance of the start of a given month based on the anticipated need. The library is not refunded for unused time and ThirdWay does not bill for excess time unless it exceeds 150% of the contracted time. **Rates:** \$1200/half day, \$2000/full day.
2. **Pay Per Use** – The library is billed for time as it is used. No guarantee of availability is represented for time not confirmed with ThirdWay in advance of a given month. **Rates:** \$1600/half day, \$2600/day.

SERVICE DESCRIPTIONS

1. USER EXPERIENCE (UX) STUDY

Goals

1. Understand usability issues in the existing Northbrook Public Library layout and design.
2. Uncover hidden issues that may affect some users.
3. Uncover needs that library users may not articulate.
4. Create video for use in the planning process.

Process

1. Develop a plan to execute the UX study. Choose patron segments for the research.
2. Create a discussion guide for the video walkthroughs.
3. Coordinate with Northbrook Public Library Staff to recruit participants for video-recorded walkthroughs.
4. Conduct at least 16 walkthroughs with users wearing GoPro cameras
5. Ensure walkthroughs encompass a variety of library users including a wheelchair user.
6. Analyze video and simultaneous interviews for insights.
7. Present findings to library leadership.

Assistance Needed from NORTHBROOK PUBLIC LIBRARY

1. Identification of patron segments for walkthroughs
2. Selecting tasks for each patron segments and approving a discussion guide.
3. Recruit participants (patron compensation **not included** in fee proposal)
 - a. They should be residents of the service area of the Northbrook Public Library
 - b. They should not be regular users of the Northbrook Public Library
4. Work with ThirdWay to create check-in station, equipment storage and greet patrons.

Fee: \$20,000

Or

(a) COMMUNITY PARTNER AND SERVICE PROVIDER INTERVIEWS

Goals

1. Understand the needs of different Northbrook communities who may be underrepresented during typical community engagement research.
2. Design innovative spaces to meet emerging needs in the community.
3. Foster closer programming relationships between funded municipal services and programs and the library.

Process

1. In Advance – Identify up to eight patron types to focus on during interview sessions (teens, caregivers with small children, non-English speakers, seniors, disabled patrons, etc.).
2. In Advance – Connect with municipal, county, state agencies, nonprofits, community and advocacy organizations who deal with these communities.
3. In Advance – schedule Zoom, in-person or hybrid meetings for each community with all providers in the same meeting.
4. On-Site – ThirdWay to conduct these meetings
5. Result – ThirdWay write-up and presentation of results including space-specific recommendations.

Assistance Needed from NORTHBROOK PUBLIC LIBRARY

1. Leadership time to identify 8 key communities for research.
2. Staff time to identify and contact service providers for each group.
3. Staff attendance at focus meetings

Total Fee: \$ 10,000

2. HEAT MAPPING AND VISUAL DISPLAY TEST WITH ANALYTICS

Summary:

For the Northbrook Public Library, ThirdWay will test the effectiveness of improved merchandising and a marketplace on the lower level of the mezzanine and in a new marketplace area near the circulation desk as follows:

1. **ILS Preparation** – Work with the library to evaluate ILS data for pre- and post-test measurements. This includes removing holds, consortium lending and being able to identify items which have circulated from displays.
2. **Prior Period Heat Mapping** – Work with library staff to complete a full heat map of the library space, showing circulation per square foot for each section of shelving within the library over a defined period that can be used as a baseline for the test.
3. **Order Displays** – Work with the library to order display furniture as needed for the marketplace test. Identify vendor, help with order specifications. Fee does not include the cost of these displays.
4. **Create Signage** – create signage for new displays and existing shelving – deliver Canva templates to library for wide-format printing by library.
5. **Design Visual Display Test** – design the measurements for the visual display test
6. **Evolve Marketplace Strategy** – Work with the library to ensure that displays in the marketplace correlate to genre reading behavior of patrons and create rules for filling and restocking the marketplace during the test.
7. **Report Results** – Measure and create a report of the results of the test.
8. **Present to Board** – Present the test design, measurement and results to the library board.

Goals

1. Evaluate the effectiveness of shelving, displays and pathways on circulation.
2. Create a measurement system for display that informs the library's future merchandising and acquisition strategy.
3. Demonstrate basic merchandising techniques and library best practices to staff and patrons.

Process

Help set up ILS to capture circulations per square foot for circs creating through browsing, excluding holds, ILL, etc.

1. **In Advance** – work with Northbrook staff to understand ILS system and set up parameters for measuring circulation effectiveness and for the merchandising test. Order display furniture, set up a collection and operational strategy for the marketplace. Train the staff to implement the test correctly.
2. **During the test** – Ensure that staff follow the agreed testing protocol. Additional training.
3. **Follow-Up** – Analyze the results of the test, create report and present to the board.

Fee: \$ 10,000 (does not include the cost of displays)

3. SPACE AUDIT

Summary:

ThirdWay will evaluate space usage at the Northbrook Public Library at 1201 Cedar Lane, Northbrook, IL 60062, and offer suggestions to improve circulation, space utilization, and overall patron satisfaction for the library. ThirdWay will present these findings in separate 70 – 110-page written reports with pictures of each space, a zone layout recommendation and best practices drawn from libraries throughout the United States.

Goals:

1. Help the Northbrook Public Library use space effectively to meet the system's goals.
2. Make specific recommendations for changes that can be made immediately.
3. Propose a zone layout for the best use of existing space.
4. Make suggestions for optimal space configuration in a renovation.

Library Visit Date: tbd

Space Audit Methodology:

1. Preliminary conversation to discuss audit.
2. Walkthrough space without guidance and take photographs.
3. Supplemental guided tour by library director.
4. Library to provide floorplans and heat maps of space.
5. Interview Director and other librarians on history, opportunities, goals and plans.
6. Produce written report with observations and recommendations.
7. Meet with Library Director, etc. to discuss final report.
8. Meet with AOR (architects) to discuss final report.
9. Presentation of final report to library board/staff/public via zoom at director's option.

Final Report: Board-ready report with photos and specific recommendations that can be implemented immediately. Report includes pictures of your library space and pictures/descriptions of best practices

Fee: \$ 12,000

4. WAYFINDING PLAN + ENVIRONMENTAL GRAPHICS DESIGN

Summary:

ThirdWay will assess all existing signage and environmental graphics except for legally required signage (for example, exit signage, restroom signage, room signage), recommend a new signage taxonomy, design new signs, provide Canva or other required design files for recommended signage, locate fabricators/printers for signage and provide price quotes for all recommended signage. This process will proceed following these steps:

1. **Signage Audit** – ThirdWay will take photos of all existing signage with locations for evaluation.
2. **Signage Taxonomy Recommendations** – ThirdWay will recommend size/color/shape/font/position for new signage layout and seek approval for color palate, font, locations, etc. ThirdWay will create a “Brand Book” of color/font/shape/size/position for signage.
3. **Signage and Environmental Graphics Design** – Preliminary designs for each type of signage or environmental graphics and one round of revisions before approval by library.
4. **Sourcing and Cost Estimate** – Source printing and fabrication for the signage and approve costs with the library before completing final signage design work.
5. **Final Artwork Delivery** – ThirdWay will deliver production files to library or approved printers/fabricators for signage.

Goals

1. Improve the ease of wayfinding in the Northbrook Public Library.
2. Reduce staff time helping patrons navigate the library.
3. Increase patron satisfaction with the library experience.

Process

A co-operative, team-based approach where ThirdWay will present signage audit findings, propose wayfinding approaches, develop visual treatments and source fabrication and printing.

4. Audit – Understand the existing use of signage and track the existing taxonomy of signage – both formal and informal.
5. Design – Create a visual taxonomy with bolder signage that helps patrons navigate library space more effectively.
6. Sourcing – Source fabrication and printing options for recommended designs.
7. Pricing – Price options for fabrication and printing of new signage.
8. Installation – Assist as necessary with installation of signage

Fee: \$ 20,000

5. STAFF TRAINING (MERCHANTISING AND SPACE PLANNING)

Summary:

For the Northbrook Public Library, ThirdWay will conduct a staff training session of up to 6 hours with a hands-on component to demonstrate the following:

1. **Merchandising** – Theory of retail merchandising, Rule of Three, Windowing, Understock, library versus retail experiences, workflow implications.
2. **Understanding Patron Needs** – Research methods to speak with patrons, biases of different methods, how to understand underserved communities, observational research techniques and benefits.
3. **Evaluating Space** – Heat mapping and daypart mapping to understand use and effectiveness of library space.
4. **Reorganizing Space** – How to update space layout to improve circulation and patron satisfaction.
5. **Case Studies** – examples of libraries implementing these recommendations.

Goals

1. Help Northbrook staff understand the methodology and goals of the master planning process.
2. Set evidence-based expectations for the reorganization of library space.
3. Make library staff more aware of the patron experience in library spaces.

Fee: \$ 3,500

Fee Summary for Proposed Work: (travel not included)

ThirdWay Space Fee Calculations Northbrook Public Library	
Element	Total
User Experience (UX) Study	\$ 20,000
Heat Mapping and Visual Display Test	\$ 10,000
Space Audit	\$ 12,000
Wayfinding + Environmental Graphics	\$ 20,000
Staff Training	\$ 3,500
	\$ 65,500
or	
Element	Total
Community Partner and Service Provider Interviews	\$ 10,000
Heat Mapping and Visual Display Test	\$ 10,000
Space Audit	\$ 12,000
Wayfinding + Environmental Graphics	\$ 20,000
Staff Training	\$ 3,500
	\$ 55,500

Licensed Services Disclaimer: ThirdWay Space does not provide guidance requiring license in the State of Illinois. ThirdWay Space provides recommendations based on space utilization and retail best practices, retail analytics and patron research. Should the Northbrook Public Library choose to make changes to its space requiring licensed services in the State of Illinois, including but not limited to architectural, engineering or interior design services, it will employ firms licensed in the state before making these changes. The Northbrook Public Library will hold ThirdWay Space harmless for all decisions requiring input from professionals licensed in the State of Illinois.



Memorandum

DATE: 1/9/26
TO: Trustees
FROM: Anna Amen
RE: Auditing Services for FY26 to FY30

I would like the Board's approval to move forward with Selden Fox for the Library's audit services, as outlined in the attached proposal.

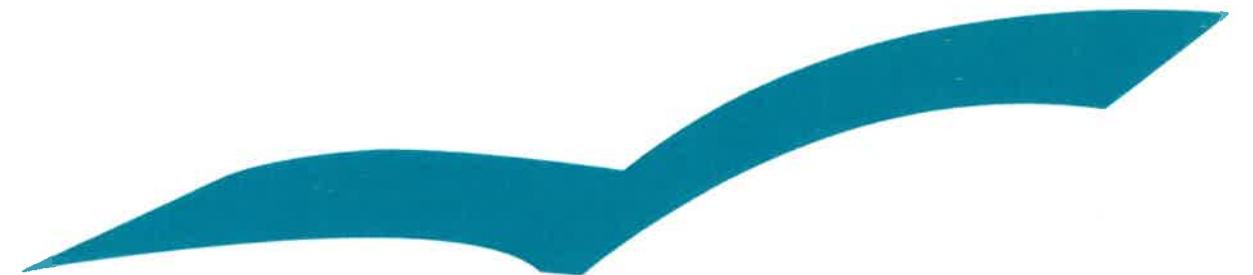
Staff recommends Selden Fox and believes that approving the firm without a formal bidding process is in the best interest of the library for the following reasons:

- Selden Fox has extensive experience working with units of local government which means they understand our reporting requirements and accounting standards.
- Selden Fox has been auditing the library since FY2015, using an auditing firm familiar with library operations helps keep the audit process efficient and minimizes disruption to library staff.
- The proposed cost is reasonable and in line with what we would expect to see for these services and going out to bid was unlikely to result in meaningful cost savings.
- The proposal includes a 15% fee increase beginning in FY26. Selden Fox has indicated that the increase is due to audit effort and cost pressures over the past several years. The increase appears reasonable and in line with similar library audits.
- Based on guidance from Ancel Glink, our attorney and the Local Library Act, contracts for professional services—such as auditing—are exempt from competitive bidding, so a formal bidding process is not legally required.

I request the Board's approval to accept the five-year audit services proposal and authorization to move forward with Selden Fox.

Proposal to Provide Professional Audit Services for the:
NORTHBROOK PUBLIC LIBRARY

FOR THE YEARS ENDING APRIL 30, 2026, 2027, 2028, 2029, AND 2030



**NORTHBROOK
PUBLIC LIBRARY**

DECEMBER 2025

Edward "Ed" G. Tracy, CPA
tracy@seldenfox.com
630.472.9456

One Parkview Plaza, Suite 710 | Oakbrook Terrace, IL 60181
1776 Legacy Circle, Suite 119 | Naperville, IL 60563
630.954.1400 | www.seldenfox.com

TABLE OF CONTENTS

TRANSMITTAL LETTER	1
FIRM QUALIFICATIONS	3
AUDIT APPROACH	5
PROPOSED AUDIT TIMELINE	8
REPRESENTATIVE CLIENTS	9
PROPOSED ENGAGEMENT TEAM	11
REQUESTED SERVICES	13
FEE PROPOSAL	14
CONCLUSION	14

This proposal for professional services contains proprietary information about Selden Fox, Ltd. The nature and extent of our services will be described in more detail in an engagement letter issued after your approval of this proposal. Our proposal is subject to the completion of our customary evaluation of prospective clients called for by professional standards.

Selden Fox

Accounting for your future

One Parkview Plaza, Suite 710 | Oakbrook Terrace, IL 60181 | www.seldenfox.com
p 630.954.1400 | f 630.954.1327 | email@seldenfox.com

December 19, 2025

Ms. Anna Amen
Business Manager
Northbrook Public Library
1201 Cedar Lane
Northbrook, IL 60062

Dear Anna:

We are pleased to submit our proposal for professional audit services for the **Northbrook Public Library** (Library) for the years ending April 30, 2026, 2027, 2028, 2029, and 2030. Given our experience with various government entities including library districts, we are confident that given the opportunity to continue to serve the Library, we will meet and surpass your expectations as they relate to work product and quality, scheduling and timing, and your overall client service experience. We say this with confidence, because our firm brings experience, expertise, and personal service to each of our clients.

Experience

We perform audits of financial statements for numerous municipalities, library districts, park districts, special recreation associations, and state and federal government grant programs. In fact, over the last 40-plus years, Selden Fox has conducted more than 600 governmental audits and served more than 80 different governmental entities, many of which have obtained and hold the Government Finance Officers Association Certificate of Achievement for Excellence in Financial Reporting. Currently, we serve more than 40 different governmental agencies.

Expertise

Because we have been and continue to be committed to the governmental sector, Selden Fox has cultivated a sizable and highly qualified governmental audit staff. All the firm's governmental audit staff have fulfilled the training requirements necessary to meet governmental audit standards and standards for the Single Audit Act. In addition, the staff completes our firm's in-house governmental training program on an annual basis.

Expertise (continued)

Selden Fox's officers have served on the Illinois CPA Society's Governmental Report Review Task Force, act as reviewers for the Government Finance Officers Association Certificate of Achievement program and are members of the Government Finance Officers Association and the Illinois Government Finance Officers Association. As such, we are at the forefront of any new accounting and reporting issues affecting local governments. We feel that part of our responsibility as auditors is to make sure our clients are aware of these issues and how they may affect them. We accomplish this in several ways, not only through our management letter issued with each audit, but also via a bi-weekly electronic newsletter highlighting topics of interest for local governments as well as privately held businesses, and regular correspondence with our clients.

Personal Service

One factor that greatly impacts the quality of your relationship with an accounting firm is service, and it is something we at Selden Fox take quite seriously. Utilizing a structure that is unusual in the accounting profession, Selden Fox provides the close, personalized service that is associated with a firm much smaller than ours. In addition, this structure ensures that our highest-level professionals are continuously available to serve clients like you.

This unique combination of such high-quality work and individualized service is one of the key characteristics that differentiate our firm from many others. It is indeed a true reflection of the pride we take in giving clients our very best.

We trust our proposal conveys our sincerest ability and desire to serve the Northbrook Public Library. Finally, I would like to express our gratitude for the opportunity to be considered to audit the Library's financial statements. If selected to handle your audit, I would be personally committed to providing superior client service.

I look forward to your response to our proposal.

Very truly yours,

SELDEN FOX, LTD.

Edward G. Tracy

Edward G. Tracy, CPA
Executive Vice President

Firm Qualifications

Selden Fox was founded in 1978 when five partners at a national accounting firm knew their clients needed more. The vision of the firm at that time was based on the philosophy that clients deserve quality work for which national firms are known and the close, personalized service of small firms. This philosophy continues to ring true today, and we are humbled by the growth we have experienced over the years.

Today, the firm has more than 70 employees, including more than 60 professional staff – 35 of whom are CPAs, all working out of our Oakbrook Terrace and Naperville offices. Opting not to engage any publicly held entities, we focus on servicing government entities, nonprofit organizations, and privately held businesses. Our offerings include audit and assurance, tax, accounting solutions, and general consulting services.

Peer Review

As part of our continuing membership in the American Institute of Certified Public Accountants (AICPA), as well as the AICPA's Center for Audit Quality (CAQ), Governmental Audit Quality Center (GACQ), and Employee Benefit Plan Audit Quality Center (EBPAQC), we are required to undergo a peer review every third year. Peer reviews involve a rigorous study by an independent accounting firm of a member firm's quality control. Areas examined include leadership responsibility within the firm, relevant ethical requirements, acceptance and continuance of clients and specific engagements, human resources, engagement performance, and monitoring.

Having completed our fifteenth peer review conducted through the National Peer Review Committee of the AICPA, **we are proud to report that we received the highest ranking possible – an opinion that we meet all of the quality control and professional standards established by the AICPA.** It is a true testament to the quality of work we consistently deliver to our clients. This is a rare accomplishment, even among national firms. A copy of our most recent peer review report is provided on the following page. Our Peer Review included a review of governmental engagements.

Firm Qualifications (continued)

Peer Review (continued)

Briscoe, Burke & Grigsby LLP CERTIFIED PUBLIC ACCOUNTANTS

Report on the Firm's System of Quality Control

November 29, 2023

To the Shareholders of
Selden Fox, Ltd.
and the National Peer Review Committee

We have reviewed the system of quality control for the accounting and auditing practice of Selden Fox, Ltd. (the firm) in effect for the year ended June 30, 2023. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at wwwaicpaorg/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on in conformity with the requirements of applicable professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including a compliance audit under the Single Audit Act, and audits of employee benefit plans.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Selden Fox, Ltd. in effect for the year ended June 30, 2023, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Selden Fox, Ltd. has received a peer review rating of *pass*.

Briscoe, Burke & Grigsby LLP
Certified Public Accountants

Members American Institute of Certified Public Accountants
4120 East 51st Street Suite 100 Tulsa, Oklahoma 74135-3633 (918) 749-8337

Audit Approach

We have conducted internal and external audits and reviews that literally number in the thousands. Yet, for each one of those, we have personalized our approach to focus on those areas that represented the most significant risks to each client. This approach destroys the myth that one audit is just like the next.

Our primary objective in our risk-based audit approach is to gain an understanding of our client, its environment, and its existing controls to identify the greatest risk areas from the onset of the audit. This understanding means we can focus on those areas and identify the relevant link between the assessed risks and the nature, timing, and extent of the audit performed. This tailored approach means our clients receive a highly efficient, focused and simplified audit; save administrative time for its staff; and acquire timely advice and answers.

Our audit procedures will be divided into two phases—preliminary fieldwork and substantive procedures. If preferable, these procedures can be performed at the same time as final procedures.

The **Preliminary Fieldwork** phase typically includes:

- Meet with selected Board members and the administration team to discuss our approach to the audit, the risks of fraud within the entity, and tasks to be performed by Library personnel.
- Review Board meeting minutes to determine and understand recent history and impact on audit.
- Provide management with a list of items needed to complete the substantive phase of the audit.
- Obtain an understanding of the Library's accounting systems and related internal controls and perform a walkthrough of significant types of transactions. We anticipate the key accounting systems will include cash receipts, revenue recognition, purchasing and cash disbursements, and payroll.
- Perform preliminary analytical procedures to identify the significant account balances and major functions.
- Conduct interviews with relevant Library department heads in compliance with auditing standards related to the consideration of fraud in a financial statement audit. Correspond with Board members, allowing them the opportunity to voice their concerns about potential fraud or irregularities.

Audit Approach (continued)

- Obtain permanent file documentation, to the extent available, including but not limited to the following:
 1. Updates made to financial and personnel policy manuals.
 2. Current year budget.
 3. Grant agreements awarded or expended during the fiscal year if applicable.
 4. All significant intergovernmental agreements.
 5. All significant outstanding contractual commitments.
- Prepare and send confirmations to:
 1. Financial institutions regarding cash balances on hand,
 2. Attorneys to discuss contingent matters, and
 3. Grantor agencies to verify conditions and terms of grant agreements.

During the preliminary fieldwork, we will review the Library's financial policies and recommend any updates we feel should be considered.

After completing our preliminary procedures, we will design our substantive procedures to provide sufficient audit evidence to allow us to render an opinion on the Library's financial statements. The **On-Site Fieldwork** phase typically includes:

- Obtain year end reconciliations for all cash and investment accounts. Confirm balances with financial institutions and test reconciling items for accuracy and completeness. Reconcile interest receivable and interest revenue to investment statements.
- Obtain property tax levy and reconcile receivable and deferred inflow balances. Vouch property tax revenue to County reports.
- Obtain detail of all capital asset additions and disposals during the year and vouch on a test basis to supporting documentation. Recompute depreciation expense on a test basis. Analyze significant non-personnel expenses to identify potential capital asset additions.
- Obtain Village auditors' calculation of pension accounts (deferred outflows and inflow, net pension liability, and pension expense) and test reasonableness of amounts to actuarial valuation reports from IMRF. Obtain census data and vouch to personnel records.
- Reconcile fund balances to the prior year's annual financial report. Identify any restrictions to be presented on the face of the financial statements.

Audit Approach (continued)

- Perform analytical procedures on revenue and expense accounts by comparing actual results to the budget. Discuss significant variances with client and review client representations to supporting documentation.
- Reconcile payroll expense and accruals for payroll and compensated absences to quarterly payroll tax returns and year end payroll registers, respectively.
- Examine grant agreements and determine portion of revenue earned at year end under the agreement.
- Analyze all lease and technology-related agreements for potential applicability of GASB Statements 87 and 96, respectively, and assist with the necessary adjustments and disclosures if necessary.
- Review possible contingent liabilities through confirmation with attorneys, examination of attorneys' invoices, and discussion with staff. Analyze construction contracts in effect to determine commitments at year end.

Additional procedures will be determined after consideration of the results of our preliminary procedures.

Technology Used

In completing our audits, we utilize the latest in software for public accounting firms – ProSystem fx Engagement, IDEA, and Suralink (secure online portal). ProSystem fx Engagement is a trial balance database audit program which integrates with Microsoft Excel and Word. All work papers are created and prepared electronically and stored within an electronic client folder. The report's financial statements are prepared in Excel, with all balances automatically linked to the trial balance database through integration features, providing additional efficiencies in the audit process.

IDEA is a data mining and extraction tool. In addition to some of the more common audit retrieval tools, IDEA improves audit efficiency and effectiveness using the following functions:

- Sampling, including planning, selection, and evaluation for systematic, random, stratified random, monetary unit, and attribute sampling plans.
- Field manipulation that allows field to be appended for calculations and recomputations.
- Field statistics which display and print statistics about any numeric or date field in the file.

Audit Approach (continued)

Technology Used (continued)

For the transmission of documents between Selden Fox and the Library, we will use Suralink. The Suralink portal provides a secure and convenient way to access audit documents on-demand. Using the portal, the Selden Fox/Library audit team can exchange, store, and organize audit documents. The system also allows for easy searching and filtering of documents. The transfer of files between Selden Fox and the Library becomes a seamless process with Suralink.

Proposed Audit Timeline

We will meet with Library annually to confirm the schedule for the upcoming audit. We propose the following audit schedule for your consideration. However, we are open to adjustment based on your ultimate availability, needs, and deadlines.

Audit Activities	Proposed Timing
Meet with the Administration team to discuss the audit plan	April
Planning and interim testing	May
Submission of a list of client-provided documents and requests	May
Begin fieldwork (approximately 1 week)	July
Financial statement draft for management review	August
Presentation of draft audit report and comments to the Library's Administration team and Board of Trustees	September
Issue final audit report **	September

** We can provide however many bound copies of the final audit report are necessary.

Representative Clients

The following is a list of current government clients.

<u>Agency</u>	<u>Initial Year of Service</u>	<u>Client Contact</u>	<u>Telephone Number</u>
Park Districts:			
Addison*	2009	Jen Hermonson	630.233.7275
Bartlett*	2021	Eric Leninger	630.540.4812
Bloomingdale*	2020	Jennifer Vale	630.529.9184
Joliet	2022	Glenn Kelley	815.741.7275
Kenilworth*	2019	Johnathan Kiwala	847.251.1691
Lombard*	2008	Jessica Ramirez	630.627.1281
Roselle*	2008	Nicolette Orlandino	630.894.1048
Westchester	2005	Lianette Robinson	708.865.8200
Municipalities:			
Calumet Park	2003	Teri Raney	708.926.7402
Cary*	2015	Kelly Brainerd	847.639.0003
Chicago Heights*	2025	David Gonzalez	708.756.5315
Hainesville	2025	Kelly Hensley	847.223.2032
Riverwoods	2021	Tony Vasquez	847.945.3990
Vernon Hills*	2021	Thomas Lyons	847.367.3700
Wayne	2010	Howard Levine	630.584.0259
West Dundee*	2005	Kathy Hays	847.551.3800
Special Districts:			
Berwyn Public Health District	2007	David Avila	708.788.6600
Berwyn Township	2005	David Avila	708.788.6600
Bloomingdale Township	2023	Ray Wanders	630.529.7715
Blue Island Public Library	2014	Anna Wassenaar	708.388.1078
Darien-Woodridge FPD	2024	Jimmy Lahanis	630.910.2088
Downers Grove Township	2023	Jill D'Urso	630.719.6610
Dundee Township	2022	Shefali Shah	847.428.8092
Homewood Public Library	2020	Colleen Waltman	708.798.0121
Northbrook Public Library	2016	Anna Amen	847.272.6229
Palatine Township*	2022	Anna Chychula	847.358.6135
Riverside Township	2014	Vera Wilt	708.442.4400
Salt Creek Sanitary	2004	Ray Hoving	630.832.3637
Wayne Township	2022	Anna Pechous	630.231.7140
Winfield Township	2018	Deena Adamson	630.231.3591
York Township	2024	Stacy Schroeder	630.620.2400

* Received GFOA Certificate of Achievement

Representative Clients (continued)

The following is a selection of our library district engagements performed over the past three years. Ed Tracy was the engagement partner on all these audits.

Client **Homewood Public Library**

Scope of Work/Date We have handled the audit for Homewood since FY2020.

Client Contact Colleen Waltman; 708.798.0121; ColleenW@homewoodlibrary.org

Client **Blue Island Public Library**

Scope of Work/Date We have handled the audit for the Library since FY2014.

Client Contact Anna Wassenaar; 708.388.1078; awassanaar@blueislandlibrary.org

Proposed Engagement Team

Perhaps more than anything else, the success of an engagement is dependent upon the experience, capabilities, and dedication of the engagement team members. When we assign individuals to your engagement, we can select those individuals with the experience, capabilities, and personal styles that best match your needs. If selected by the Library our engagement team will consist of a shareholder, Ed Tracy; a quality control officer; a senior auditor; and one associate auditor.

Edward G. Tracy, CPA | Executive Vice President and Shareholder



Ed joined the audit department of Selden Fox in 1988. Now an executive vice president and shareholder at Selden Fox, Ed leads the firm's governmental audit practice. Committed to serving the governmental sector throughout his career, Ed has designated government entities as a long-term area of personal specialization, working with municipalities, park districts, townships, and special districts. He has personally supervised the following government engagements (audits unless otherwise indicated) in the last two years:

- Bartlett Park District
- Berkeley Park District (compilation)
- Bloomingdale Township
- Blue Island Public Library
- Calumet Park, Village
- Cary, Village of
- Downers Grove Township
- Dundee Township
- Homewood Public Library
- Itasca, Village of (accounting services)
- Joliet Park District
- Kenilworth Park District
- Lake Barrington, Village
- Lakemoor, Village
- Northbrook Public Library
- Palatine Township
- Riverside Township
- Riverwoods, Village of
- Vernon Hills, Village of
- Wayne Township
- Wayne, Village of
- West Dundee, Village of
- Westchester Park District
- Wheatland Township
- Winfield Township
- York Township

The remaining balance of Ed's practice includes nonprofit organizations and manufacturers. A majority of his practice is audits, although he often provides full service to his clients taking responsibility for tax compliance matters for his government and nonprofit sector clients.

Proposed Engagement Team (continued)

Edward G. Tracy, CPA | Executive Vice President and Shareholder (continued)

Ed received his bachelor's degree in accounting from the University of Illinois. He is a member of the AICPA, the Illinois CPA Society, and the Illinois Government Finance Officers Association. He has served on the Illinois CPA Society's Government Report Review Task Force and is a reviewer in the Government Finance Officers Association Certificate of Achievement Program. Ed has also been a training instructor for the Illinois CPA Society's Government Report Review Task Force and has written articles on auditing government entities for both the Illinois Association of Park Districts and the Township Officials of Illinois member publications.

An avid Chicago Cubs and Bulls fan, Ed enjoys golfing and spending time with his wife and four children, including triplets.

Peggy L. Brady, CPA | Quality Control Audit Senior Vice President



As a member of the Selden Fox Auditing and Assurance group, Peggy performs independent reviews of financial statements, audit reports, and high-risk areas for the firm's clients. She develops and conducts continuing education curriculum for the firm to provide technical guidance and assistance.

Prior to joining Selden Fox in 2012, Peggy worked at a national firm for more than 10 years, most recently serving as a director of audit and accounting. In this position, and through assurance and consulting engagements, she gained managerial experience and technical expertise in a variety of industries.

She completed her undergraduate studies at Augustana College earning a bachelor's degree in accounting and business administration. Peggy went on to study at DePaul University and was awarded a master's degree in business administration. Peggy is a member of the AICPA and the Illinois CPA Society. She also is a member of the Accounting Principles Committee with the Illinois CPA Society.

Outside of work, Peggy enjoys spending time with her husband and two daughters and being involved with their extracurricular activities and school. She is a co-troop leader and volunteer with Girl Scouts of Greater Chicago and Northwest Indiana.

Audit Quality

Selden Fox has adopted the AICPA Code of Ethics and Standards of Professional Conduct. We have a three-member Quality Assurance team that reviews all attestation work performed by Selden Fox. This team also conducts an annual internal monitoring process to monitor and enforce the code of conduct and standards.

Requested Services

Annual Audit

We will perform the annual audit of the financial statements of Northbrook Public Library in accordance with generally accepted auditing standards and issue an opinion on the financial statements for the years ending April 30, 2026, 2027, 2028, 2029, and 2030.

Additional Reports

We will prepare and file the annual supplemental report by the Office of the Comptroller of the State of Illinois.

Management Letter

We will consider the financial records and related internal controls in order to determine our auditing procedures for the purpose of expressing our opinion on the financial statements. We will prepare a detailed letter of comment on internal controls and, if applicable, other recommendations for improvement.

Communication to the Board of Library Trustees

We will prepare a letter providing additional information regarding the scope and results of the audit as set forth in the auditing standards. Such information will include all audit adjustments and an immediate written report of all irregularities and illegal acts or indications of illegal acts of which we become aware of to the Library Director.

Attendance at Board Meetings or Audit Committee Meetings

We are available to attend board or committee meetings to discuss audit results and any recommendations for improvement. Additionally, we are available to meet with staff to discuss final adjustments.

Fee Proposal

We are excited at the opportunity to partner with Northbrook Public Library. Our fees are based on actual time spent rendering services at standard professional hourly rates, which are related to the level of experience and training of the individuals assigned. Based on the foregoing, **we estimate that our professional fees, inclusive of all expenses, for the requested services would be as follows:**

FYE26	FYE27	FYE28	FYE29	FYE30
\$13,500	\$13,750	\$14,000	\$14,250	\$14,500

This fee considers the implementation of any standards issued to date. We will issue progress billings for services rendered; invoices are payable upon presentation. Our proposed fee assumes that:

- The accounting records and related documentation will be adequate and up to date with accounts properly reconciled. No audit adjustments to the general ledger trial balance provided by management are expected. Such adjustments may increase the ultimate professional costs for the audit.
- Our audit staff will receive maximum assistance in retrieving documents and in preparing confirmation requests and required schedules.

It should also be noted that occasionally, because of unexpected happenings or unanticipated events, it becomes necessary to charge more than budgeted. In our experience, these are rare events, and such changes are not made without the client's concurrence. Our proposed fee will be the Library's cost unless otherwise mutually agreed.

We are available throughout the year to answer questions as they arise and indeed encourage the Library to do so. Time spent on such inquiries will not be billed unless it is necessary for us to research the question and/or provide a memo of our findings or recommendations. Any such billing or additional services, including consulting or special accounting projects, would be billed separately and will not be undertaken without your authorization.

Conclusion

We would like to convey our sincerest desire and ability to serve the Northbrook Public Library. Upon acceptance of our proposal, an engagement letter will be sent in accordance with our professional standards on an annual basis. Please call us if you have any questions.

Strategic Plan Report

January 2026

This quarterly update highlights our continued progress toward the goals outlined in the library's Strategic Plan and reflects the sustained commitment of both the Board and staff to advancing this work in thoughtful and practical ways. Between October and December 2025, staff across departments contributed significant time, expertise, and creativity to initiatives that support the plan's priorities, with those efforts summarized in the highlights that follow.

Enclosed in the packet is a detailed list of activities identified by library staff to support Strategic Plan implementation.

The summary below focuses on actions taken during the October–December 2025 reporting period that align with these identified activities. A separate report addressing Year 1 completed activities and outcomes is currently in development and will be shared with the Board once finalized. Within this update, completed activities are noted, and a visual indicator is used to identify work that is ongoing and does not have a defined start or end date.

As this report illustrates, the Strategic Plan continues to function as a living document—guiding our work while allowing flexibility to respond to emerging needs, opportunities, and insights. This adaptive approach enables us to make steady, intentional progress while remaining attentive to the evolving needs of our community, our staff, and the organization as a whole.



2025 Completed Goals

Connect with Our Community

Goal 1.1 Position ourselves as the community's center for information needs.

- *Strategic Plan Activity: Offer the auditorium as a rental space for residents to foster community engagement and resource utilization.*
- *Strategic Plan Activity: Staff learn about AI tools and look into integrating AI tools into library operations.*
- *Year 3 Strategic Plan Activity: Conduct a public computer usage study to determine the optimal number of computers needed to meet community demand.*

Build an Inclusive Culture

Goal 2.3 Embed Equity, Diversity, and Inclusion in Operations

- *Strategic Plan Activity: Review and set expectations for effective and inclusive meeting norms.*
- *Strategic Plan Activity: Collaborate with an external vendor to reestablish methodology and reporting for monthly statistics.*
- *Strategic Plan Activity: Perform a comprehensive pay equity audit to ensure fair compensation across all roles.*
- *Strategic Plan Activity: Develop a comprehensive programming plan that caters to diverse interests and age groups, ensuring a balance of educational, recreational, and cultural content.*

Create Spaces to Belong

Goal 3.1 Reimagine our spaces to increase flexibility and opportunities to explore and connect.

- *Strategic Plan Activity: Create a Civic Room hybrid meeting room to support flexible, hybrid meetings and events.*

Goal 3.3 Improve access to facilities, programs, and materials to better serve all populations.

- *Strategic Plan Activity: Launch the "Find More Illinois" initiative to provide access to more materials statewide.*

Current Updates

Connect with Our Community

Goal 1.1 Position ourselves as the community's center for
information needs.



Strategic Plan Activity: Make data-driven decisions to optimize and expand collections based on community needs.

- Ongoing work using tools like Collection HQ and Simply Reports to optimize collections.
- Kim Hegelund and Fifth Star Collective coordinated circulation data for the ILLNET Report, showing requests increasing by more than 4,000 items.



Strategic Plan Activity: Develop and implement programs to educate the community on AI.

- Running a successful two-part series (lecture + hands-on) every quarter with strong attendance; will continue offering until demand decreases.
- No AI programs identified specifically for children at this time.

Year 2 Strategic Plan Activity: Update the website to better meet staff and community information needs, with a focus on increasing accessibility.

- Website work group is working on evaluating vendors and identifying must haves and wish list items.

Other activities that serve this goal:

Youth & Teen Services

- Designed and implemented the Winter Reading Program for babies, children, and teens.
- Conducted Preschool Outreach with:
 - Northbrook Community Nursery School
 - GBN Preschool Visit
- Additional outreach included:
 - Greenbriar Girl Scout Troop Visit
 - Northbrook Park District Autumnfest
 - School Librarians Sora Outreach at:
 - Field Middle
 - Meadowbrook
 - Greenbriar
 - Hickory Point
 - NBJH
 - Wood Oaks Junior High
 - Solomon Schechter
- Hosted Finals events with the following attendance:
 - December 16: 430 teens
 - December 17: 477 teens
 - December 18: 338 teens
- Youth/Teen Services Programs:

- October: 38 programs, 1,143 attendance
- November: 24 programs, 941 attendance
- December: 29 programs, 2,178 attendance

Marketing & Communications

- Worked with community partners to schedule and display items in the library's display cases, including:
 - Friends of the Library
 - TotalLink to Community
 - Northbrook Veterans Center
 - North Shore Radio Club
 - The Harbour
- Coordinated with Facilities to drop off food donations at the Northfield Township Food Pantry.
- Worked with Bright Plum to create a Web Accessibility Statement and added it to the library's website accessibility page.
- Collaborated with Barb Cornew from Cook County Commissioner Scott Britton's office to promote the Cook County United Against Hate initiative.
- Hosted the quarterly Northbrook Communicators meeting at the library on November 19.

Adult Services

- Hosted programs for the 4th One Book One Northbrook, centered around Symphony of Secrets by Brendan Slocumb, including an author event on October 15.
- Added free online access to the Chicago Tribune through the library website.
- Hosted filmmaker Lisa Hurwitz for a screening of The Automat with a director Q&A.
- Presented a leadership program featuring an Abraham Lincoln lookalike.
- Opened the Fine Arts Fall concert series with Tango with Winnie, with 108 patrons attending.
- Hosted Vietnam War: A Soldier's Story on November 13.
- Hosted a concert by Victor Asuncion and Alexander Hersch on November 23.
- Concluded the lecture series with The Photography of Weegee.

Goal 1.2 Provide exposure to new experiences and ways of looking at the world.

Other activities that serve this goal:

- 278 requests were 3D printed for community members from October through December. Below are our stats for 2025.

Yearly Stats



Build an Inclusive Culture

Goal 2.1 Align staff roles and responsibilities and improve decision making processes across the organization.



Strategic Plan Activity: Integrate equity, diversity, and inclusion (EDI) principles into decision-making processes.

- EDI Follow-Up Assessment launched September 29, 2025, with full report from Zheng Consulting being presented at January board and All Staff meetings.



Strategic Plan Activity: Identify activities that can be sunsetted with an eye toward meeting strategic goals and increasing staff capacity.

- Sunset picture book displays on the picture book shelves.
- Sunset the Readers' Corner Newsletter

Other activities that serve this goal:

- Circulation staff provided structured feedback on candidates for the Circulation Supervisor position. Staff's feedback was reviewed in the decision-making process.

Goal 2.2 Foster a culture of shared growth and learning.



Strategic Plan Activity: Continue to implement regular training sessions for staff development.

- Next safety training will be on January 23 and will include an active shooter refresh.
- Multiple Staff attended the annual Illinois Library Association annual conference in October.
- YS Staff spent a total of 80.75 hours doing continuing education on topics such as Mental Health First Aid, Communico's Reading Challenge, and Accessibility.
- Reestablished the Staff Development Day Committee to design a high-impact annual day of learning for May 2026. The committee convened on October 6th and is identifying topics and speakers aligned with strategic priorities.

Strategic Plan Activity: Staff learn about AI tools and look into integrating AI tools into library operations.

- We rolled out Google Gemini to all staff, focusing on how our AI guidelines protect patron and staff privacy and talking about how we can use AI ethically and responsibly.

Goal 2.3 Embed Equity, Diversity, and Inclusion in Operations



Strategic Plan Activity: Reassess and redistribute EDI-related workstreams to ensure balanced workload and effective implementation.

- HR Director Becky Moore initiated a comprehensive overhaul of the Performance Evaluation Process, transitioning toward a Merit + COLA compensation model. HR is collaborating with management to refine evaluation criteria. Finalized tools are scheduled for rollout at the end of January 2026.

Other activities that serve this goal:

- Provided Bite Sized Accessibility Training at All Staff Meetings.

Create Spaces to Belong

Goal 3.1 Reimagine our spaces to increase flexibility and opportunities to explore and connect.

Strategic Plan Activity: Review and update the Master Facilities Plan to reflect current and future needs.

- Updated timeline is being reviewed by the board at the January 2026 meeting.

Year 2 Strategic Plan Activity: Explore and implement new internet service provider to support community needs and select the best provider for our library.

- E-rate process continues with Anna and OSG overseeing implementation to support community needs and select best provider.

Other activities that serve this goal:

- Created a Café/Bakery themed Imaginative Play space in Youth. Refreshed the wooden train set at the Pinwheel Table. Moved the Teen Award and Teen Audio collection to the Teen Loft.
- Technical Services staff continued work on the face out Picture Book Project, adding front-facing labels and coordinating with Circulation using Simply Reports.

Goal 3.2 Cultivate an inclusive and welcoming library environment.



Strategic Plan Activity: Continue to organize programs that celebrate cultural diversity and foster an inclusive community.

- Provided monthly volunteer opportunities for Transitional Students (18+) and students in grades 6–12.
- Held the yearly fall Accessibility Hour on October 12.
- Worked with Wepa Libros to update the Juvenile World Language Collection.
- Created book displays for Native American Heritage Month, Hispanic Heritage Month, and Dios de los Muertos.

TRANSMITTAL

TO: SCHOOL DISTRICT 225
SCHOOL DISTRICT 30
NORTHBROOK PARK DISTRICT
NORTHBROOK PUBLIC LIBRARY

FROM: Deputy Director of Development & Planning Services Michaela Kohlstedt

DATE: December 31, 2025

The Village of Northbrook has received the attached request for a Cook County Class 6b Tax incentive from Orest Express, Inc. (the "Applicant") as the contract purchaser of the property commonly known as 2525 Shermer Road (the "Subject Property").

A general location map is shown below.

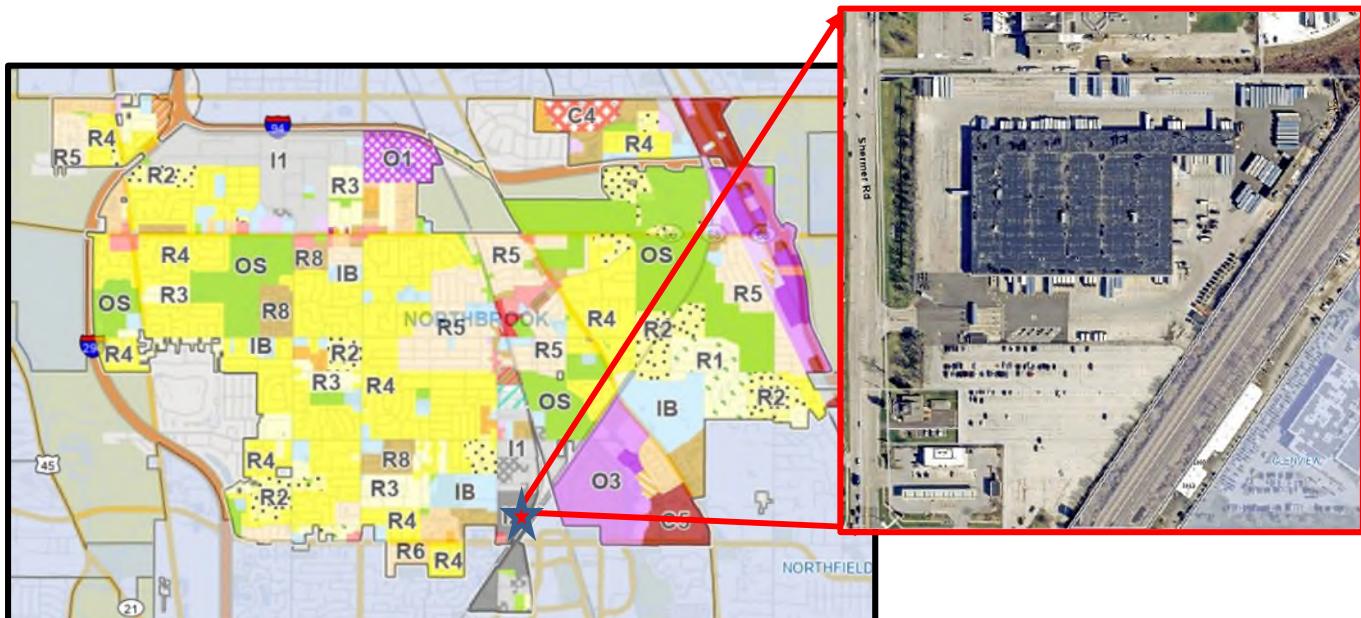


Figure 1: Location – 2525 Shermer Road

In accordance with the Village's general procedures for the review and approval of Cook County Class 6b tax incentive request, the local school districts, park district and public library are given the opportunity to review and comment on this request.

The Village Board of Trustees is scheduled to conduct a preliminary review of this request at its **January 13, 2026** meeting. The Applicant plans to purchase the Subject Property to relocate its existing business from Elk Grove Village to Northbrook to allow for continued growth of the business and a more streamlined operation under one roof.

Please see the attached request submitted by the Applicant, as well as the material we have prepared for the Board of Trustees preliminary review.

If you wish to have the Village Board review the comments from your taxing district, please forward them to me by **January 31, 2026**.

Note: In 2022 with Resolution 22-R-33, the Village revised its Cook County Class 6b application review process, shortening the length and adjusting the timing for your taxing district's review. This review period is now 30 days and runs parallel with the Board of Trustees preliminary review, ending prior to the formal Board of Trustees review.

If you have questions of the Village regarding the application, please contact me at Michaela.kohlstedt@northbrook.il.us.

Questions of the applicant should be directed to:

Keito Ido, Applicant Representative
Law Offices of Liston & Tsantilis
200 S. Wacker, suite 820
Chicago, IL 60606
P: 312-604-3815
E: kido@ltlawchicago.com

Please keep me informed of when your Board is scheduled to consider the request, and if you would like the Applicant to attend the meeting.

We look forward to receiving your Board's comments.

Sincerely,

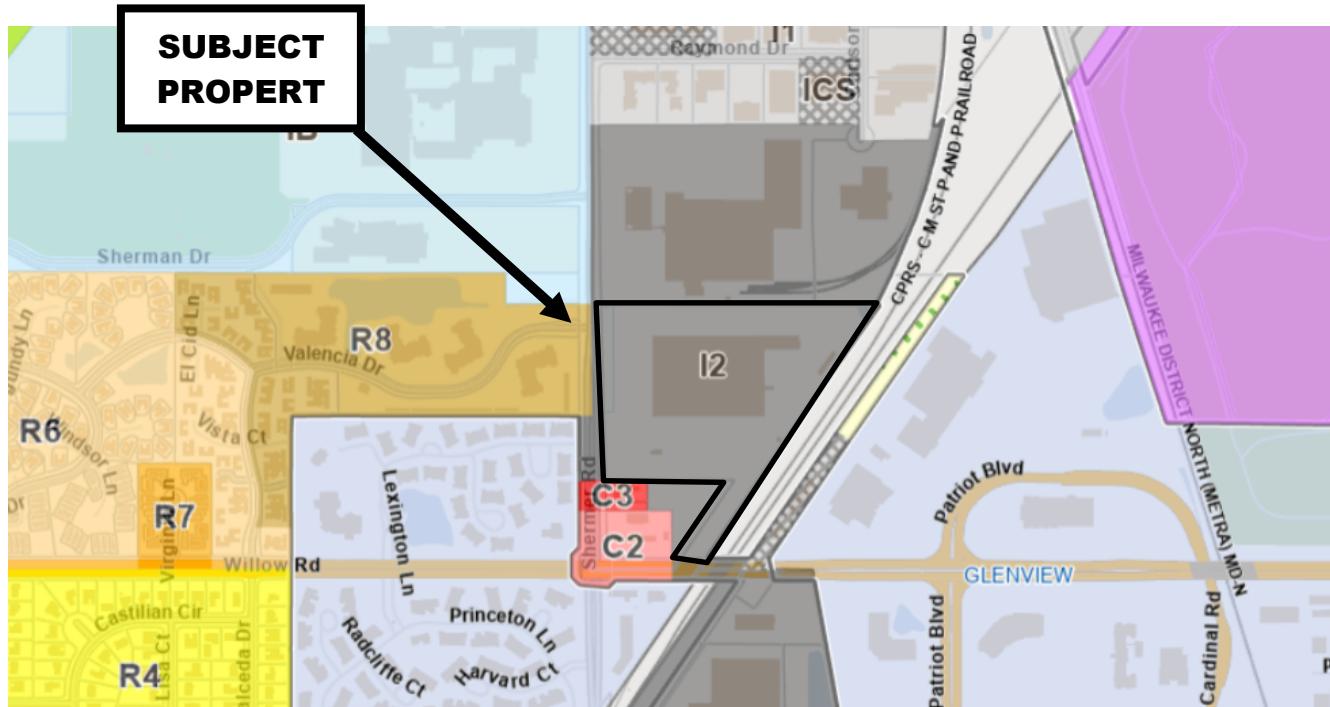


Michaela Kohlstedt, AICP
Deputy Director of Development & Planning Services
Village of Northbrook, IL

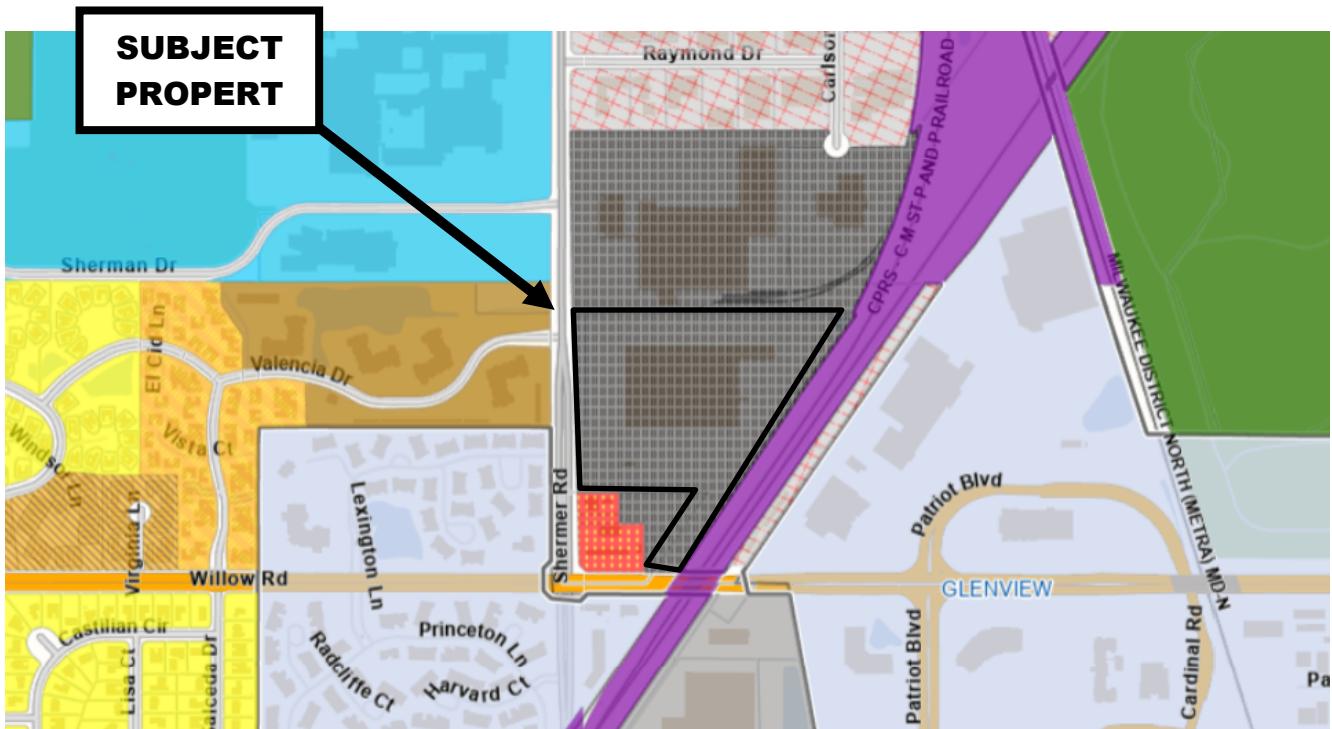
BOT-25-22 APPLICATION SUMMARY

Applicant:	Orest Express Inc.
Site Location:	2525 Shermer Road
Requested Action:	Initial Comments on Feasibility of Obtaining Village Support for a Cook County Class 6B Incentive
Proposal:	Request of a Resolution from the Village of Northbrook supporting and consenting to a Class 6B Tax Incentive for an existing building
Existing Zoning & Land Use:	I-2 Light Industrial
Surrounding Zoning & Land Use:	North: I-2 Light Industrial; manufacturing and distribution South: I-1 Restricted Industrial; office and warehouse uses East: C-3 Central Business and C-2 Neighborhood Commercial; office and gas station West: R-8 Multi-Family Residential; condominium development
Comprehensive Plan Designation:	Major Industrial/Distribution

ZONING MAP

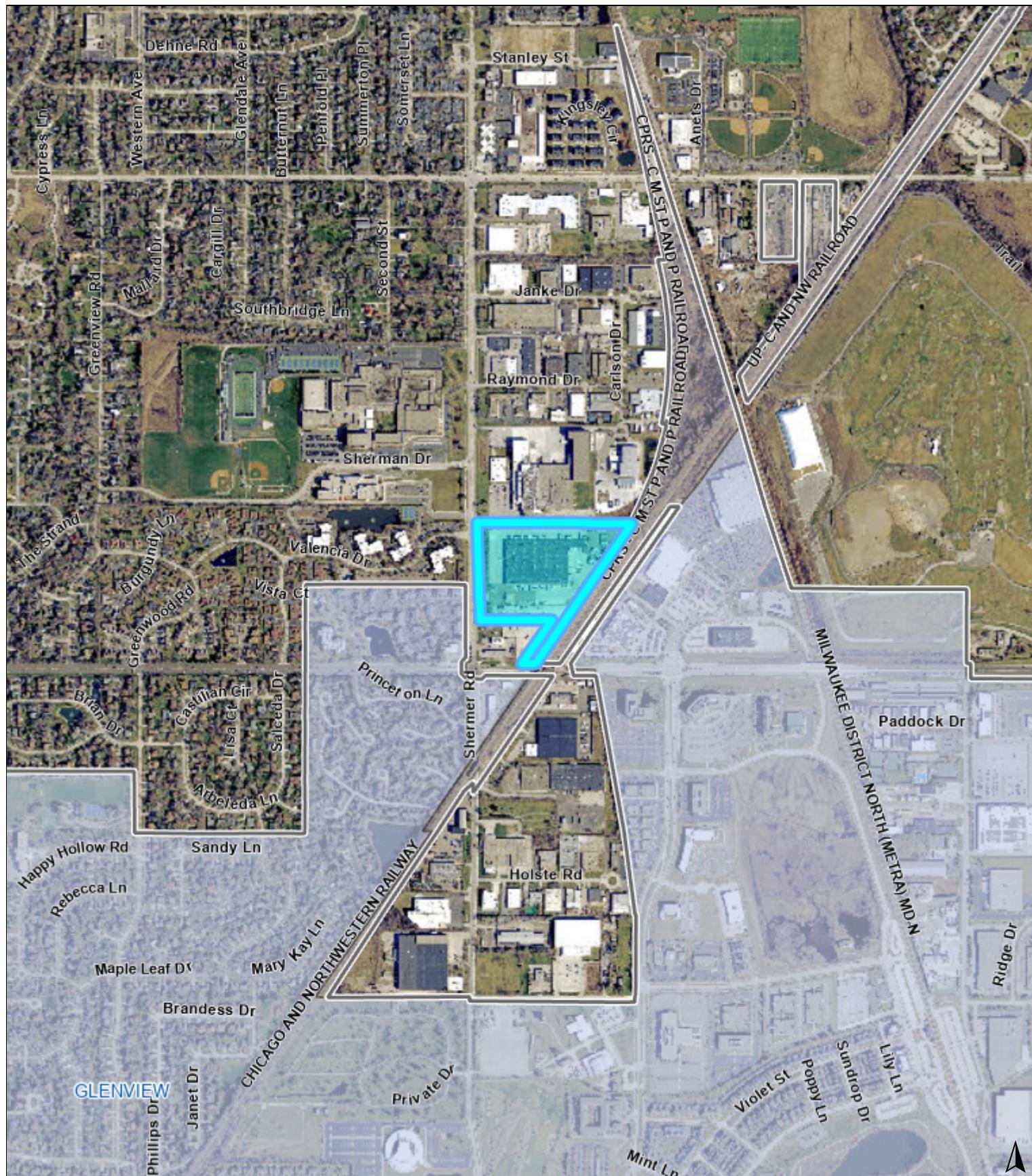


COMPREHENSIVE PLAN MAP



Legend

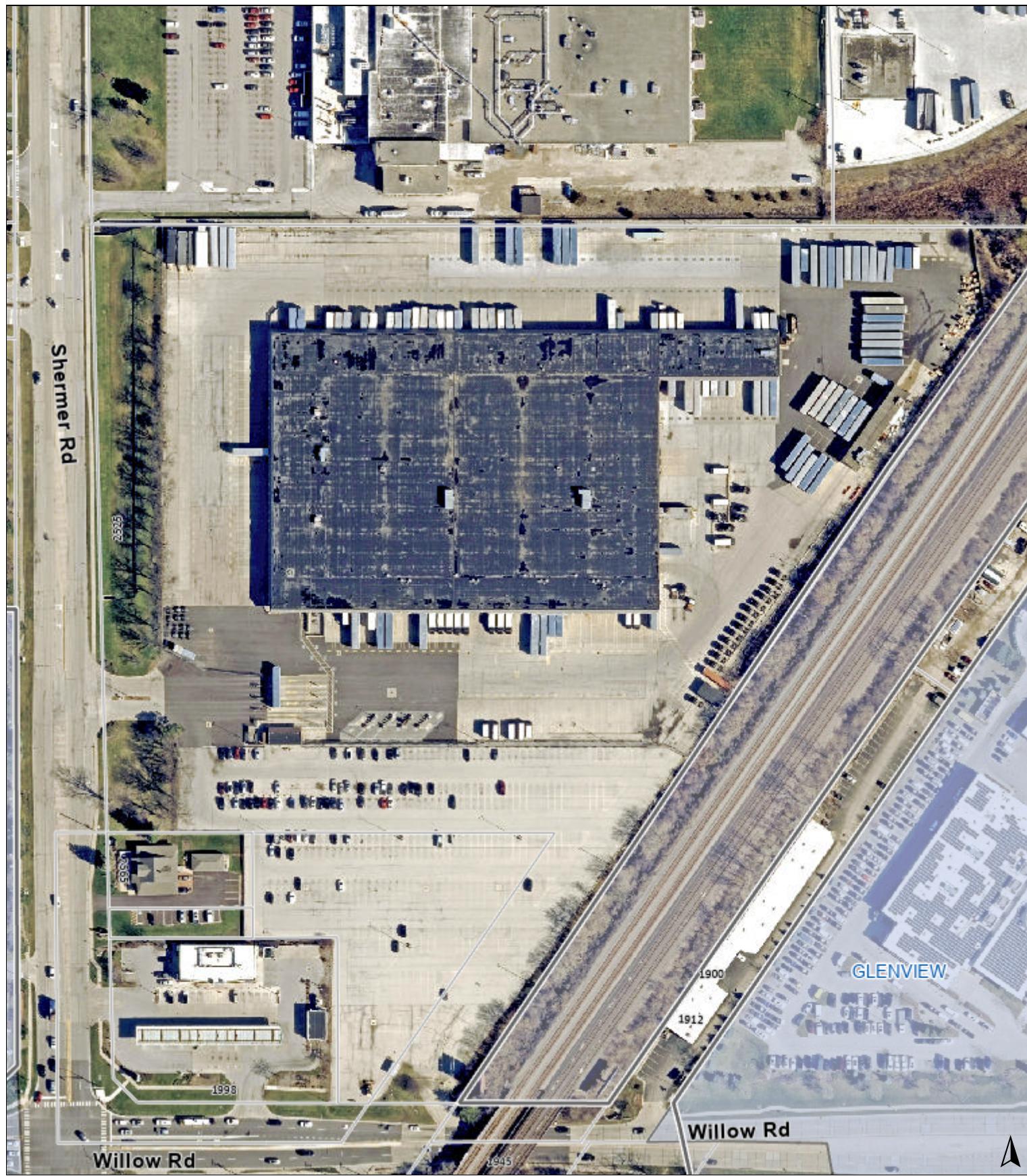
- [Green] Open Space & Outdoor Recreation
- [Yellow] Single Family
- [Yellow with dots] Single Family Large Lot
- [Yellow with diagonal lines] Multi-Family up to 6 DUA
- [Brown with diagonal lines] Multi-Family 6-9 DUA
- [Brown] Multi-Family 9-15 DUA
- [Brown with dots] Multi-Family over 15 DUA
- [Blue and white diagonal lines] Senior or Special Residential
- [Blue] Government Facility
- [Blue] Institutional Facility
- [Pink with dots] Neighborhood Office
- [Pink] Neighborhood Edge 1
- [Pink with dots] Neighborhood Edge 2
- [Light purple] Office - Professional
- [Magenta] Office - Corporate/Corridor
- [Red with dots] Community Retail
- [Red] Major Retail
- [Red with diagonal lines] Industrial & Commercial Service
- [Grey] General Industrial, Warehouse & Office
- [Purple] Major Industrial/Distribution
- [Purple] Transportation, Comm. & Utilities
- [Red with diagonal lines] Village Center Mixed Use
- [Red with diagonal lines] Techy Area Multi-Use
- [Red with diagonal lines] Major Corridor Multi-Use
- [Blue and white dots] Techy Area



Disclaimer: The GIS Consortium and MGP Inc. are not liable for any use, misuse, modification or disclosure of any map provided under applicable law. This map is for general information purposes only. Although the information is believed to be generally accurate, errors may exist and the user should independently confirm for accuracy. The map does not constitute a regulatory determination and is not a base for engineering design. A Registered Land Surveyor should be consulted to determine precise location boundaries on the ground.

Print Date: 12/24/2025

Notes



0 200 400 ft

Print Date: 12/24/2025

Notes

Disclaimer: The GIS Consortium and MGP Inc. are not liable for any use, misuse, modification or disclosure of any map provided under applicable law. This map is for general information purposes only. Although the information is believed to be generally accurate, errors may exist and the user should independently confirm for accuracy. The map does not constitute a regulatory determination and is not a base for engineering design. A Registered Land Surveyor should be consulted to determine precise location boundaries on the ground.



MEMORANDUM

To: Cara Pavlicek, Village Manager
From: Amy McEwan, Director of Development & Planning Services
Date: January 13, 2026
Subject: 2525 Shermer Road – Application for Cook County 6b

The applicant Orest Express, Inc. is seeking initial comments on the feasibility of obtaining Village support for a Cook County Class 6b tax incentive for the property located at 2525 Shermer Road. The applicant has indicated in the attached submittal narrative that it will purchase the property, and seek a 6b for the necessary rehabilitation of the building site to accommodate the proposed trucking and warehousing business. While the building has not been vacant for a minimum of 12 months, it has been vacant for several months, and the applicant is requesting the Cook County Class 6b based upon substantial rehabilitation.

In reviewing the request, staff suggest that the Board of Trustees focus on the following questions:

1. Does the Applicant's Class 6b request satisfy the general Cook County criteria for the approval of a Class 6b incentive involving a vacant structure?
2. Does the Applicant's 6b proposal satisfy the general Village criteria for the approval of a 6b incentive?

Key information concerning the property is summarized below:

- The building on the Subject Property has been **vacant for approximately five months**.
- The Subject Property was previously occupied by United Parcel Service Inc. and marketing of the site for sale began in April 2025.
- The 180,000 square foot building is 40-50 years old, on a 20 acre lot.
- The Subject Property is in the I-2 Light Industrial zoning district and is not within the floodplain.
- The Future Land Use Map in the Comprehensive Plan identifies the property and other properties to the north as appropriate for Major Industrial/Distribution Uses.
- The property is in Elementary School District 30 and High School District 225.

The applicant plans to purchase the Subject Property to expand and move from its current location in Elk Grove Village, Illinois. The applicant operates a warehouse and distribution business for order fulfilment, whereupon it also stores and repairs equipment, as well as conducting administrative services.

The applicant plans to utilize the entire 180,000 square foot industrial building following major interior renovations to accommodate the new user as the structure was originally designed for the prior operator (UPS). Following the renovation and relocation to the property, the applicant intends to occupy the building with 29 full-time employees and 1099 employees, an increase over a two month period from the current 9 full time and 1099 employees.

The Applicant plans to submit a request to the Cook County Assessor's Office to receive a County

6b property tax classification based on occupancy of the property that requires significant rehabilitation. The applicant plans an initial investment of approximately \$4,200,000 in building and site improvements to the existing facility to meet their needs and comply with current operating standards.

The Cook County Class 6b program reduces the overall property tax bill for industrial and warehouse buildings over the course of 12 years. If approved, the property will have a tax assessment based on the following schedule:

- at 10% of market value for the first 10 years,
- 15% in the 11th year, and
- 20% in the 12th year.
- **In year 13, the property reverts to the normal assessed value of 25% of market value.**

Real estate is eligible for Class 6b status if it is used primarily for “industrial purposes” and is either:

- (a) new construction,
- (b) substantial rehabilitation of a building, or
- (c) occupation of an “abandoned” property.

When approving a 6b tax incentive, the Village has a policy of requiring an agreement that stipulates the Applicant may not apply for an extension of the 6b tax relief program.

In this instance, the Applicant is seeking approval of a 6b incentive a building that requires substantial rehabilitation. The Applicant has prepared a conservative exhibit that depicts the projected property tax impact of the Subject Property; conservative because the property tax projection assumes the purchase price of the Subject Property along with \$4,200,000 in improvements. As such, the following information summarizes the overall impact over the 12-year lifespan of the 6b program (2026-2038) if the 6b was approved, not approved but occupied by the applicant, the property tax savings for the applicant if the 6b was approved, and the property tax if it remained vacant for 12 years.

<u>Estimated Taxes Paid over 12 Years With the Class 6b</u>	<u>Estimated Taxes Paid over 12 years Without The Class 6b</u>	<u>Estimated Savings in Property Taxes over 12 years</u>	<u>Estimated Taxes Paid over 12 years if left Vacant</u>
\$7,515,492	\$16,701,093	\$9,185,601	\$4,979,370

Village Procedures for Processing Class 6b Applications

The guidelines consist of three basic categories:

1. Economic & Fiscal Impacts of the Business on the Community (50% consideration)
2. Conditions of Existing Building/Site and Private Financial Contribution Compared to Public Assistance (30% consideration)
3. Quality of Jobs Created (20% consideration)

In addition, bonus consideration of up to 5% can be awarded due to environmental features of the proposed business. When the Village Board established these eligibility guidelines, they were adopted as general guidelines as a way for the Board to evaluate requests.

Staff has transmitted the Applicant's request to the applicable taxing districts for the required 30-day review and comment period as established by Resolution 22-R-33. The comments from that review

period will be provided during the formal Board of Trustees review.

The Applicant and staff will be present at the January 13, 2026, meeting to answer any questions from the Board.

December 23, 2025
(Originally Submitted on December 9, 2025)

VIA EMAIL

Village of Northbrook
Attention: Michaela Kohlstedt
1225 Cedar Lane
Northbrook, IL 60062

Re: Class 6b Tax Incentive Resolution Request

Orest Express Inc.
2525 Shermer Road,
Northbrook, Illinois 60062
PINs: 04-22-100-038-0000 and 04-22-100-
040-0000

Dear Ms. Kohlstedt:

Orest Express Inc. (the “Applicant” or “Orest Express”) is the contract purchaser of the above-referenced property (the “Subject Property”) and is requesting a resolution from the Village of Northbrook supporting and consenting to a Class 6b Tax Incentive for the Subject Property based on Substantial Rehabilitation and Re-Occupation of Abandoned Property with Special Circumstance and Purchase for Value. The Subject Property features a 180,000 square foot industrial building and parking spaces on approximately 869,714 square feet of land.

Background of the Applicant and Proposed Use

Orest Express will be occupying the Subject Property. Founded in 2004, Orest Express is a family-owned and -operated transportation and logistics company. It specializes in trucking and warehouse services, maintains 9 full-time and 1099 qualified employees, and serves the Midwest and West Coast. Orest Express currently operates at 221 Joey Drive, Elk Grove Village, IL 60007 and is looking to relocate to Subject Property as part of a general expansion of its operations in the Chicagoland area. There, it will engage in warehousing, order fulfilment and distribution, equipment storage, equipment repair, and various administrative activities. As part of the expansion, Orest Express plans to hire 20 additional full-time and 1099 employees at the Subject Property within a 24-month period following relocation. All employees will be compensated in accordance with the Cook County Living Wage.

Subject Property Improvements and Job Creation

Should the Class 6b Tax Incentive be granted, the Applicant plans to spend over \$1,000,000 on demolition and over \$4,000,000 on various new improvements to the Subject Property. Specifically, the Applicant will spend approximately \$850,000 demolish and recycle the interior conveyor, approximately \$350,000 to demolish the existing office space, \$500,000 to build a new office space, \$2,000,000 upgrade the recessed docks, \$300,000 to install a new HVAC system, \$300,000 to install a new electrical system, \$300,000 to install a new plumbing system, \$300,000 to install a new fire suppression system, and \$500,000 to repair to roof. These planned improvements are expected to create 40-50 temporary construction jobs. All employees will be compensated in accordance with the Cook County Living Wage.

Real Estate Tax Analysis

Following construction and subsequent occupation, the Subject Property is projected to have a market value of approximately \$22,500,000 which would generate an estimated \$7,515,492 in total taxes (or approximately \$556,703 per year) over the life of the Class 6b Tax Incentive. Without the incentive, the Subject Property's market value is expected to fall and to generate approximately \$4,979,370 in taxes over the next 12 years (or approximately \$414,948 per year) based on the latest certified market value with full vacancy relief. Therefore, with the Class 6b Tax Incentive, the Subject Property would generate approximately **\$2,536,122** in additional real estate taxes over the life of the Class 6b Tax Incentive. Please see the enclosed *12 Year Tax Comparison Chart* for more details.

In addition to increased property tax revenues, the Applicant's presence will significantly benefit the local community. The Applicant expects its employees and visitors to frequent the village's local establishments (including restaurants, gas stations, and retail stores). The Applicant also expects to attract both new and returning customers who will also frequent nearby establishments. According to the enclosed *New Employee Business Impact Chart*, an estimated 20 full-time employees would spend approximately **\$84,750** per year in the village on gas, entertainment, groceries, etc. In total, the construction and reoccupation of the Subject Property could generate approximately **+\$3,500,000** in additional revenue over the life of the incentive.

Employee Economic Impact Chart					
Purchase	Emp.	%	Exp./Week	Weeks	Total
Lunch	20	55%	\$55	50	\$30,250
Grocery	20	30%	\$50	50	\$15,000
Consumer Goods	20	25%	\$35	50	\$8,750
Entertainment	20	15%	\$55	50	\$8,250
Auto-Gas	20	75%	\$30	50	\$22,500
TOTAL					\$84,750
TOTAL OVER 12 YEARS					\$1,017,000

“But-For” Condition Statement

The Applicant has determined that without the incentive, the heavy Cook County property tax burden will make the project infeasible. In the event the Subject Property is not developed, the Applicant is likely to keep Subject Property vacant and unused to limit tax exposure and eventually sell them off.

Conclusion

Based on the foregoing, the Applicant requests that the Village of Northbrook review its Class 6b Tax Incentive request and approve a resolution supporting and consenting to a Class 6b Tax Incentive for the Subject Property based on Substantial Rehabilitation and Re-Occupation of Abandoned Property with Special Circumstance and Purchase for Value. Should you need any additional documentation or have any questions or concerns, do not hesitate to contact me at (312) 604-3815 or via email at kido@ltlawchicago.com.

Respectfully Submitted,

Keito Ido





CLASS 6B ELIGIBILITY APPLICATION

Carefully review the Class 6B Eligibility Bulletin before completing this Application. For assistance, please contact the Assessor's Office, Development Incentives Department (312) 603-7529. This application, *a filing fee of \$500.00*, and supporting documentation (*except drawings and surveys*) must be filed as follows:

This application must be filed **PRIOR TO** the commencement of New Construction or **PRIOR TO** the commencement of Substantial Rehabilitation Activities or **PRIOR TO** the commencement of Reoccupation of Abandoned Property.

Applicant Information

Name: Orest Express Inc. or its assignee Telephone: (773) 600-6188
Company: Orest Express Inc.
Address: 221 Joey Drive
City: Elk Grove Village State: IL Zip Code: 60007
Email: vlad@orestexpress.com

Contact Person (if different than the Applicant)

Name: Volodymyr Motkaluyk Telephone: (773) 600-6188
Company: Orest Express Inc.
Address: 221 Joey Drive
City: Elk Grove Village State: IL Zip Code: 60007
Email: vlad@orestexpress.com

Property Description (per PIN)

If you are applying for more than three different PINs, please submit the additional PIN information in an attachment.

Street Address: (1) 2525 Shermer Road

Permanent Real Estate Index Number: 04-22-100-038-000

(2) 2525 Shermer Road

Permanent Real Estate Index Number: 04-22-100-040-0000

(3) _____

Permanent Real Estate Index Number: _____

City: Northbrook State: IL Zip Code: 60062

Township: Northfield Existing Class: 5-93 and 5-80

Attach legal description, site dimensions and square footage and building dimensions and square footage.

Identification of Person Having an Interest in the Property

Attach a complete list of all owners, developers, occupants and other interested parties (*including all beneficial owners of a land trust*) identified by names and addresses, and the nature and extent of their interest.

Industrial Use

Attach a detail description of the precise nature and extent of the intended use of the subject property, specifying in the case of the multiple uses the relative percentages of each use.

Include copies of materials, which explain the occupant's business, including corporate letterhead, brochures, advertising material, leases, photographs, etc.

Employment Opportunities

How many construction jobs will be created as a result of this development? 40-50

How many new permanent full-time and part-time employees do you now employ in Cook County?

Full-time: 5 Part-time: N/A

How many new permanent full-time jobs will be created by this proposed development? 20

How many new permanent full-time jobs will be created by this proposed development? N/A

Nature of Development

Indicate nature of proposed development by checking the appropriate space:

- New Construction **(Read and Complete Section A)**
- Substantial Rehabilitation **(Read and Complete Section A)**
Incentive only applied to the market value attributable to the rehabilitation
- Occupation of Abandoned Property - No Special Circumstance
(Read and Complete Section B)
- Occupation of Abandoned Property - With Special Circumstance
(Read and Complete Section C)
- Occupation of Abandoned Property - **(CEERM Supplemental Application)**
(Read and Complete Section C)

SECTION A (NEW CONSTRUCTION/SUBSTANTIAL REHABILITATION)

If the proposed development consists of *New Construction* or *Substantial Rehabilitation*, provide the following information:

Estimated date of construction commencement (*excluding demolition, if any*): Q2-Q3 2026

Estimated date of construction completion: Q1 2027

Attach copies of the following:

1. Specific description of the proposed *New Construction* or *Substantial Rehabilitation*
2. Current Plat of Survey for subject property
3. 1st floor plan or schematic drawings
4. Building permits, wrecking permits and occupancy permits (*including date of issuance*)
5. Complete description of the cost and extent of the *Substantial Rehabilitation* or *New Construction* (*including such items as contracts, itemized statements of all direct and indirect costs, contractor's affidavits, etc*)

SECTION B (ABANDONED PROPERTY WITH NO SPECIAL CIRCUMSTANCE)

If the proposed development consists of the reoccupation of abandoned property, purchased for value, complete (1) and (2) below:

1. Was the subject property vacant and unused for at least 12 continuous months prior to the purchase for value?

YES NO

When and by whom was the subject property last occupied prior to the purchase for value?

Attach copies of the following documents:

- (a) Sworn statements from person having personal knowledge attesting to the fact and the duration of vacancy and abandonment
- (b) Information (*such as statements of utility companies*) which demonstrate that the property was vacant and unused and indicate duration of such vacancy

2. Application must be made to the Assessor prior to occupation:

Estimated date of reoccupation: _____

Date of Purchase: _____

Name of purchaser: _____

Name of seller: _____

Relationship of purchaser to seller: _____

Attach copies of the following documents:

- (a) Sale Contract
- (b) Closing Statement
- (c) Recorded Deed
- (d) Assignment of Beneficial Interest
- (e) Real Estate Transfer Declaration

SECTION C (SPECIAL CIRCUMSTANCES)

If the applicant is seeking special circumstances to establish that the property was abandoned for purposes of the Incentive where there was a **purchase for value**, but the period of **abandonment prior to purchase was less than 12 months**, complete section (1).

If the applicant is seeking special circumstances to establish that the property was abandoned for purposes of the Incentive where there was **no purchase for value**, but the period of **abandonment prior to the application 12 continuous months or greater**, complete section (2).

1. How long was the period of abandonment prior to the purchase for value? 5+ months

When and by whom was the subject property last occupied prior to the purchase for value?

The subject property was previously occupied by United Parcel Service Inc. and has been 100% vacant and unused since June 23, 2025

Attach copies of the following documents:

- Sworn statements from persons having personal knowledge attesting to the fact and the duration of the vacancy and abandonment
- Information (*such as statements of utility companies*) which demonstrate that the property was vacant and unused and indicate duration of vacancy
- Include the finding of special circumstances supporting “abandonment” as determined by the municipality, or the County Board, if located in an unincorporated area. *Also include the ordinance or resolution from the Board of Commissioners of Cook County stating its approval for less than 12-month abandonment period.*

Application must be made to the Assessor prior to the commencement of reoccupation of the abandoned property.

Estimated date of Reoccupation:	<u>ASAP</u>
Date of purchase:	<u>TBD</u>
Name of purchaser:	<u>Orest Express Inc.</u>
Name of seller:	<u>BT-OH, LLC</u>
Relationship of purchaser to seller:	<u>Purchaser - Seller</u>

Attach copies of the following documents:

- Sale Contract
- Closing Statement
- Recorded Deed
- Assignment of Beneficial Interest
- Real Estate Transfer Declaration

2. How long has the subject property been unused?

12 or greater continuous months (*Eligible for Special Circumstance*)

3 continuous months and maintain/create 250 Employees (*Eligible for Special Circumstance under CEERM*) - Complete CEERM Supplemental Application

Not Eligible for Special Circumstance if No purchase and less than 12 continuous months vacant, or not a CEERM

When and by whom was the subject property last occupied prior to the filing of this application?

Attach copies of the following documents:

- (a) Sworn statements from persons having personal knowledge attesting to the fact and the duration of the vacancy and abandonment
- (b) Information (*such as statements of utility companies*) which demonstrate that the property was vacant and unused and indicate duration of vacancy
- (c) Include the finding of special circumstances supporting "abandonment" as determined by the municipality, or the County Board, if located in an unincorporated area. Also include the ordinance or resolution from the Board of Commissioners of Cook County stating its approval for lack of a purchase for value.

Application must be made to Assessor prior to the commencement of reoccupation of the abandoned property.

Estimated date of reoccupation: _____

CEERM SUPPLEMENTAL APPLICATION
(This form will ONLY be utilized for applicants who specifically elect for CEERM)

This supplemental eligibility application is for properties that have been abandoned (due to special circumstances) where there has been no purchase for value and the buildings and other structures have been vacant and unused for at least three continuous months and applicant has provided sufficient documentation to establish that such applicant will create or maintain at least 250 jobs for employees at the subject location.

The CEERM Program shall be limited to the party who is the initial applicant of the Class 6B Incentive under the CEERM Program and the subject of the municipal Resolution or Ordinance.

Under the CEERM Program, qualifying industrial real estate would be eligible for the Class 6B level of assessment from the date of substantial re-occupancy of the abandoned property. Properties receiving Class 6B will be assessed at 10% of market value for the first 10 years, 15% in the 11th year and 20% in the 12th year. The terms of this program are Not Renewable.

I _____ applicant/representative hereby specifically elect to submit this **Supplemental Application** for the **CEERM** program.

Further affiant sayeth not.

Agent's Signature

Agent's Name & Title

Agent's Mailing Address

Agent's Telephone Number

Applicant's Name

Applicant's Mailing Address

Applicant's e-mail address

Subscribed and sworn before me this _____ day of _____, 20 _____

Signature of Notary Public

LOCAL APPROVAL

A certified copy of a resolution or ordinance from the municipality in which the real estate is located (*or the County Board, if the real estate is located in an unincorporated area*) should accompany this Application. *The ordinance or resolution must expressly state that the municipality supports and consents to this Class 6B Application and that it finds Class 6B necessary for development to occur on the subject property.* If a resolution is unavailable at the time the application is filed, a letter from the municipality or the County Board, as the case may be, stating that a resolution or ordinance supporting the incentive has been requested may be filed with this application instead. If the applicant is seeking to apply based on the reoccupation of abandoned property and will be seeking a finding of “special circumstances” from the municipality, in addition to obtaining a letter from the municipality confirming that a resolution or ordinance supporting the incentive has been requested, the applicant must file a letter from the County Board confirming that a resolution validating a municipal finding of special circumstances has been requested. If, at a later date, the municipality or the County Board denies the applicant’s request for a resolution or ordinance, the applicant will be deemed ineligible for the Class 6B incentive, whether or not construction has begun. In all circumstances, the resolution must be submitted by the time the applicant files an “Incentive Appeal”.

FINALIZING THE INCENTIVE PROCESS

In order to finalize the class change you will need to file an **Incentive Appeal** with supporting documentation (including **Proof of Occupancy**) in the year that the property has been substantially occupied. It is advised that you access our website (www.cookcountyassessor.com) to determine the allowable filing dates for such action.

When filing an appeal requesting an Incentive Class Change, a \$100.00 filing fee (made out to the Cook County Assessor) must be included. The property cannot receive Class 6B designation until you file an Incentive Appeal Form, AND this office grants reclassification for the parcel(s).

I, the undersigned, certify that I have read this Application and that the statements set forth in this Application and in the attachments hereto are true and correct, except as those matters stated to be on information and belief and as to such matters, the undersigned certifies that he/she believes the same to be true.

Signature

Volodymyr Motkaluyk

Print Name

Date

12/9/2025
V.P.

Title

ECONOMIC DISCLOSURE STATEMENT AND AFFIDAVIT

I, Volodymyr Motkaluyk, as a representative of Orest Express Inc. (the "Applicant"), do hereby certify that I would attest to the following facts as required by Sections 74-46 and 74-62 through 74-73 of the Cook County Code if called to testify that:

1. I am a duly authorized agent of the Applicant which is the contract-purchaser of the property located at 2525 Shermer Road, Northbrook, Illinois 60062 (PINs: 04-22-100-038-0000 and 04-22-100-040-0000);
2. The Applicant does not own any other property in Cook County;
3. The Applicant's ownership is as follows:

Volodymyr Motkaluyk – 33.33% Ownership
505 Helen Drive, Northbrook, IL 60062

Ihor Motkaluyk – 33.33% Ownership
1850 Duffy Lane, Bannockburn, IL 60015

Orest Motkaluyk – 33.33% Ownership
2529 Oak Avenue, Northbrook, IL 60062; and

4. To my knowledge and after reviewing the Applicant's records, the Applicant is not delinquent in the payment of any property taxes administered by Cook County or by any of its local municipalities.

Further Affiant Sayeth Not

Date: 12/9/25

Subscribed and sworn before me
This 9 day of December, 2025

Lisette G Martinez Gonzalez
Signature of Notary Public





COOK COUNTY CLASS 6B VILLAGE OF NORTHBROOK APPLICATION

When submitting a request to the Village of Northbrook for a Cook County Class 6b resolution of support, please submit one reproducible copy of the following information to the Deputy Director of Development and Planning Services (DPS), 1225 Cedar Lane, Northbrook, IL 60062. If you have questions regarding the application materials or process, please contact the DPS Department at (847) 664-4050.

GENERAL INSTRUCTIONS

- Prior to completing an application, an applicant is strongly encouraged to contact the DPS Department to discuss the property and project for which they are requesting the Class 6b classification. The contact information is listed above.
- Fill out the application materials completely. If any questions are left unanswered or required documents not submitted, an explanation for the omission must be included.
- Only typed applications will be accepted and reviewed.
- Only complete applications will be presented to the Board of Trustees for consideration.

REQUIRED APPLICATION MATERIALS

Please submit a completed Cook County Assessor's Office *Class 6b Eligibility Application* & all applicable attachments, plus the following information.

Economic & Fiscal Impacts of Business on the Community

1. Provide the North American Industry Classification System (NAICS) code(s) for the business to occupy the subject property. Describe the potential for future growth of the business and of the industry the business is in.
2. If an existing business, provide information regarding the business' current operations, such as locations, size of current facilities, and number of current employees. Also explain why the business is relocating or expanding to Northbrook.
3. Do any Northbrook businesses provide services or supplies to the business that will be locating on the subject property? If so, please list the businesses and describe the services/supplies they would provide?
4. Does the business that will be locating on the subject property provide services or supplies to Northbrook businesses? If so, please list the businesses and describe the services/supplies that would be provided to them.
5. Explain by how much the proposed construction of building additions or other significant improvements to the site would increase the assessed value of the property.
6. Will the project require the Village to invest in public infrastructure improvements? If so, what percentage of the costs of those improvements will the business/developer contribute?
7. Will the project generate new local sales tax? If so, how much would be annually generated?
8. Is the business a start-up company or an expansion of an existing Northbrook operation?
9. Describe the business' history of contributing to its community through volunteer work, financial contributions or other means. If a new start-up business, please demonstrate the business' commitment to becoming involved in the community.

Conditions of Existing Building /Site and Private Financial Contribution Compared to Public Assistance

10. If purchasing the property, provide documentation from the current property owners that they have made a reasonable effort to market the property, including a description of those efforts. Provide a chronological detail of those efforts.
11. Has the current owner of the subject property filed a vacancy appeal with the County within the last two years? If so, please provide a copy of the appeal and details of how the appeal has affected the assessed value of the property.
12. Submit a tax impact table showing the projected property taxes that would be paid if the 6b is granted over the life of the 6b and the property taxes that would be paid if the property is reused without the 6b (A suggested format is available in a Microsoft Excel worksheet).

13. Submit copies of the property tax bill for the subject property for the past three years.
14. Provide an explanation and documentation for why the site in question is difficult to lease or sell due to age, size, condition, or unique characteristics of the building.
15. If purchasing the property, provide a copy of a certified appraisal of the property or other documentation demonstrating that the property's purchase price is not the reason for needing a Class 6b incentive;
16. Provide documentation indicating that deferred maintenance issues are not the reasons for needing the 6b incentive.
17. Provide details regarding the amount of investment the applicant and the business planning to occupy the subject property plan to invest in the property.
18. What is the purchase price of the real property on the subject property? Provide support documentation, such as a copy of the purchase contract.
19. Submit a narrative and supporting documents indicating the need for the 6b incentive.

Quality Jobs to be Created

20. Provide the projected number of employees that will be located at the Northbrook facility and the average wage for those employees.
21. Provide a break down between full-time, part-time, and seasonal employees at the Northbrook facility.
22. Provide a breakdown between current employees, if any, that will transfer from the business' existing facilities and new employees from the local area.
23. Provide the projected total annual payroll for the Northbrook facility.

Environmental Impact (please see the Village Climate Action Plan (CAP) here:

<https://www.northbrook.il.us/993/Climate-Action-Plan>

24. Please describe if the business has implemented any of the recommendations of the CAP, including for example,:
 - a. Comprehensive energy and resource efficiency programs, including green buildings (e.g. LEED certification, binding energy efficiency commitments, etc.)
 - b. Comprehensive waste reduction, waste exchange, and recycling programs.
 - c. Products/services that expand markets for recycled materials.
 - d. Development of renewable energy resources or products that conserve energy.

Class 6b General Requirements & Standards

25. Does the proposal satisfy all applicable Cook County criteria for the approval of a Class 6b incentive?
26. Does the applicant agree to develop, operate, and maintain the Subject Property in compliance with all codes and ordinances of the Village of Northbrook?
27. Does the applicant acknowledge that the Village shall not renew a Class 6b incentive after the initial 12-year Class 6b assessment time period has expired?
28. Does the applicant agree to tie the property tax relief from the Class 6b classification to a specific business(es) locating and remaining on the subject property for length of the 12-year Class 6b assessment time period?
29. The applicant must acknowledge that it must enter into an agreement with the Village setting the terms and conditions for the Village's support and consent to the Class 6b classification.

APPLICATION FEES & DEADLINES

Along with the application materials, please submit a check in the amount of \$5,000 to cover Village staff, legal and consultant expenses to process the application.

The Village Board meets on the second and fourth Tuesday of each month. Completed applications should be submitted to the Deputy Director of DPS (contact information listed above) two weeks prior to the meeting at which the applicant wishes to have the Board review the preliminary application.

VILLAGE OF NORTHBROOK GUIDELINES

The Northbrook Board of Trustees shall use the following guidelines when determining the suitability of a specific request for a Cook County Class 6b Classification.

Economic & Fiscal Impacts of Business on the Community	(50% consideration)
Higher consideration to be given for:	
<ul style="list-style-type: none">• Potential for future growth of the business and of the industry the business is in.• Businesses that build on the resources, materials, and workforce of the local community.• A greater increase in the assessed value of the property through the construction of building additions or making other significant improvements to the site.• Projects not requiring new public capital improvements. If public infrastructure improves are necessary, a greater contribution by the developer for public infrastructure improvements.• A greater amount of sales tax base expansion.• Businesses that have a history of contributing to their communities through volunteer work, financial contributions or other means. If a new start-up business, the business demonstrates its commitment to becoming involved in the community.• Start-up companies and expansions of existing local operations.	

Conditions of Existing Building /Site and Private Financial Contribution Compared to Public Assistance	(30% consideration)
---------------------------------------------------------------------------------------------------------------	----------------------------

Higher consideration to be given for:	
<ul style="list-style-type: none">• Buildings that have been vacant for one year or more.• Sites for which prior to applying for a Class 6b exemption, a vacancy appeal for the site has been granted by Cook County.• A property owner demonstrating that reasonable efforts have been made to market the property over time.• Sites that are difficult to lease or sell due to age, size, condition, or unique characteristics of the building.• Sites for which the purchase price of the property is market rate and is not the reason for needing a 6b incentive and for which deferred maintenance issues are not the reasons for needing the 6b incentive.• A greater ratio of investment by the assisted business compared to amount of Class 6b relief.• A lower ratio of Class 6b relief compared to total annual payroll• A greater ratio of value of improvements to existing the building to purchase price of the real property.• Quality of the case being made that the Class 6b is necessary for the project to move forward.	

Quality Jobs to be Created	(20% consideration)
-----------------------------------	----------------------------

Higher consideration to be given for:	
<ul style="list-style-type: none">• Higher wage rates.• Full-time; long-term, non-seasonal positions.	

OVERALL CONSIDERATION – 100%

Environmental Impact	(Bonus Consideration of up to 5%)
-----------------------------	------------------------------------------

Higher consideration to be given for:	
<ul style="list-style-type: none">• The more environmentally sound the company's operation, including but not limited to:<ul style="list-style-type: none">◦ Comprehensive energy and resource efficiency programs, including green buildings (e.g. LEED certification, binding energy efficiency commitments, etc.)◦ Comprehensive waste reduction, waste exchange, and recycling programs.• The more environmentally sound the company's products/services, including but not limited to:<ul style="list-style-type: none">◦ Products/services that expand markets for recycled materials.◦ Development of renewable energy resources or products that conserve energy.	

Class 6B General Requirements & Standards

1. The proposal must satisfy all applicable Cook County criteria for the approval of a Class 6b incentive;
2. The proposal must be consistent with the Comprehensive Plan and Strategic Plan for Economic Development
3. The applicant shall agree to develop, operate, and maintain the Subject Property in compliance with all codes and ordinances of the Village of Northbrook;
4. The Village shall not renew a Class 6b incentive after the initial 12-year Class 6b assessment time period has expired.
5. The Village's support of a particular Class 6b request shall be tied to a specific business(es) that will occupy the subject property and benefit from the Class 6b property classification.
6. The Village shall require an agreement with the applicant setting the terms and conditions for Class 6b approval.

Class 6B Review Process

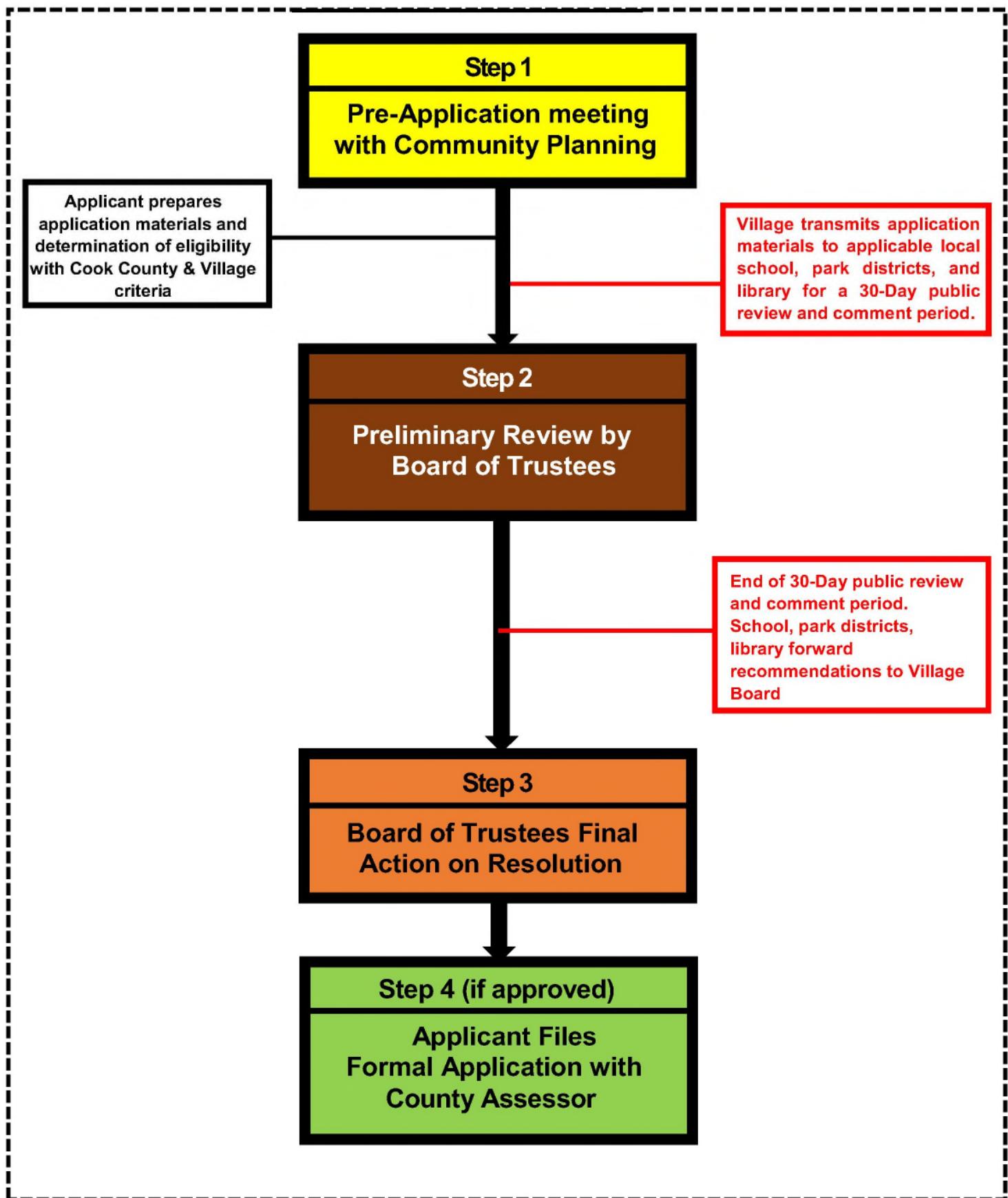
Prior to the Board of Trustees' preliminary review of a Class 6b request, the Village will transmit the application to School District 225, the Park District, library the impacted elementary school district to begin a 30-day public review and comment period. If providing a formal recommendation, School District 225, the Park District, library and the impacted elementary school district must submit its formal recommendation promptly after the 30-day public review and comment period.

Reimbursement of Village Expenses

An applicant requesting the Class 6b Classification shall be responsible for the actual expenses incurred by the Village in processing an application. Such costs shall include, but not be limited to, the following direct and indirect expenses: (1) administrative and document preparation and review by Village staff, (2) professional and technical consultant services, (3) legal review, consultation, and document preparation, and (4) copy reproduction, document recordation, postage, and other miscellaneous expenses necessary to process the request.

Application Fee & Escrow Deposit

A\$5,000 application fee and escrow deposit shall be submitted with each Class 6b request to reimburse the Village for expenses associated with processing the application. If these expenses exceed the amount of the initial application fee and escrow deposit, the applicant is responsible for reimbursing the Village for the additional expenses. If the Village does not approve the request and the actual expenses are less than the amount of the fee and escrow deposit, the applicant will be issued a refund of the surplus funds by the Village. If the Village approves the request and the actual expenses are less than the amount of the fee and escrow deposit, the Village will retain all surplus funds.



Additional Information

Economic & Fiscal Impacts of Business on the Community

<p>Provide the North American Industry Classification System (NAICS) code(s) for the business to occupy the subject property. Describe the potential for future growth of the business and of the industry the business is in.</p>	<p>NAICS: 48-49</p> <p>The business has grown considerably since its founding in 2011 to the point where the current facility at 221 Joey Drive, Elk Grove Village, IL 60007 is insufficient to support the business's current operations.</p> <p>According to IBISWorld, the local freight trucking industry now generates \$99.1 billion in annual revenue, growing 6.1% between 2020 and 2025 and projected to rise another 1.3% through 2030.</p> <p>Further, the market size of the general warehousing and storage industry in the United States has been growing at a compound annual growth rate of 4.6 % between 2020 and 2025. This growth is expected to continue for the next five years.</p>
<p>If an existing business, provide information regarding the business' current operations, such as locations, size of current facilities, and number of current employees. Also explain why the business is relocating or expanding to Northbrook.</p>	<p>Orest Express is a family-owned and - operated transportation and logistics company. It specializes in trucking and warehouse services, maintains 9 full-time and 1099 employees, and serves the Midwest and West Coast. Orest Express currently operates at 221 Joey Drive, Elk Grove Village, IL 60007 and is looking to relocate to the subject property as part of a general expansion of its operations in the Chicagoland area.</p> <p>At the subject property, it will engage in warehousing, order fulfilment and distribution, equipment storage, equipment repair, and various administrative activities. As part of the expansion, Orest Express plans to hire 20 additional full-time and 1099 employees at the Subject Property within a 24-month period following relocation.</p>

<p>Do any Northbrook businesses provide services or supplies to the business that will be locating on the subject property? If so, please list the businesses and describe the services/supplies they would provide?</p>	<p>To be determined</p>
<p>Explain by how much the proposed construction of building additions or other significant improvements to the site would increase the assessed value of the property.</p>	<p>With a \$18.3 million purchase price, the market value is expected to be \$22.5 million with \$4.2 million in added improvement costs.</p> <p>With a \$22.5 million market value, the assessed value would be \$5.625 million at a 25% level of assessment and \$4.950 at a 10% level of assessment.</p>
<p>Will the project require the Village to invest in public infrastructure improvements? If so, what percentage of the costs of those improvements will the business/developer contribute?</p>	<p>No</p>
<p>Will the project generate new local sales tax? If so, how much would be annually generated?</p>	<p>No, the business does not generate sales tax.</p>
<p>Is the business a start-up company or an expansion of an existing Northbrook operation?</p>	<p>The business is an expansion of an existing business from Elk Grove Village.</p>
<p>Describe the business' history of contributing to its community through volunteer work, financial contributions or other means. If a new start-up business, please demonstrate the business' commitment to becoming involved in the community.</p>	<p>The business, its executives, and its employees actively donate to and volunteer with the St. Joseph the Betrothed Ukrainian Catholic Church.</p>

Conditions of Existing Building / Site and Private Financial Contribution Compared to Public Assistance

<p>If purchasing the property, provide documentation from the current property owners that they have made a reasonable effort to market the property, including a description of those efforts. Provide a chronological detail of those efforts.</p>	<p>See enclosed <i>Marketing Brochure</i>. CBRE began marketing the property in April. United Parcel Service Inc. (UPS) owned and occupied the property until June 23, 2025. The property has been vacant ever since.</p>
<p>Has the current owner of the subject property filed a vacancy appeal with the County within the last two years? If so, please provide a copy of the appeal and details of how the appeal has affected the assessed value of the property</p>	<p>See enclosed appeal history.</p>
<p>Submit a tax impact table showing the projected property taxes that would be paid if the 6b is granted over the life of the 6b and the property taxes that would be paid if the property is reused without the 6b (A suggested format is available in a Microsoft Excel worksheet).</p>	<p>See enclosed <i>12-Year Estimate</i>.</p>
<p>Submit copies of the property tax bill for the subject property for the past three years.</p>	<p>See enclosed tax bills.</p>
<p>Provide an explanation and documentation for why the site in question is difficult to lease or sell due to age, size, condition, or unique characteristics of the building.</p>	<p>The property requires environmental remediation due to leaking underground storage tanks and the presence or likely presence of hazardous substances and/or petroleum products. Phase I Report is available upon request. Furthermore, because the subject property was built in the 1970-1980s by UPS to suit its needs, it is very specific to UPS's use.</p>

	<p>Additionally, the loading docks throughout the building are not grade level, and the floor is about four feet lower than the dock height.</p> <p>For the above-mentioned reasons, it is very challenging for any new user/buyer/tenant to start operating without performing major renovations and modifications to the subject property.</p>
<p>If purchasing the property, provide a copy of a certified appraisal of the property or other documentation demonstrating that the property's purchase price is not the reason for needing a Class 6b incentive</p>	<p>A certified appraisal of the property is being prepared but is not currently available.</p>
<p>Provide documentation indicating that deferred maintenance issues are not the reasons for needing the 6b incentive.</p>	<p>Not available</p>
<p>Provide details regarding the amount of investment the applicant and the business planning to occupy the subject property plan to invest in the property.</p>	<p>The Applicant plans to spend over \$1,000,000 on demolition and over \$4,000,000 on various new improvements to the subject property. Specifically, the Applicant will spend approximately \$850,000 demolish and recycle the interior conveyor, approximately \$350,000 to demolish the existing office space, \$500,000 to build a new office space, \$2,000,000 upgrade the recessed docks, \$300,000 to install a new HVAC system, \$300,000 to install a new electrical system, \$300,000 to install a new plumbing system, \$300,000 to install a new fire suppression system, and \$500,000 to repair to roof. These planned improvements are expected to create 40-50 temporary construction jobs.</p>
<p>What is the purchase price of the real property on the subject property? Provide support documentation, such as a copy of the purchase contract.</p>	<p>\$18.3 million</p> <p>Purchase and Sale Agreement is available upon request.</p>

Submit a narrative and supporting documents indicating the need for the 6b incentive.	See cover letter.
---------------------------------------------------------------------------------------	-------------------

Quality of Jobs to be Created

Provide the projected number of employees that will be located at the Northbrook facility and the average wage for those employees.	<p>29 full-time employees (projected)</p> <ul style="list-style-type: none"> • 9 full-time and 1099 employees (to be relocated to the Northbrook facility) • 20 additional full-time and 1099 employees (to be hired within a 24-month period following relocation) <p>Employee wages: \$20-\$60 per hour.</p>
Provide a break down between full-time, part-time, and seasonal employees at the Northbrook facility.	See above.
Provide a breakdown between current employees, if any, that will transfer from the business' existing facilities and new employees from the local area.	See above.
Provide the projected total annual payroll for the Northbrook facility	Approximately \$1.2 million - \$2.9 million

Environmental Impact

Please describe if the business has implemented any of the recommendations of the CAP.	<p>None</p> <p>However, please note the environmental remediation necessary to clean up the property.</p>
----------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------

Class 6b General Requirements and Standards

Does the proposal satisfy all applicable Cook County criteria for the approval of a Class 6b incentive?	Yes
Does the applicant agree to develop, operate, and maintain the Subject Property in compliance with all codes and ordinances of the Village of Northbrook?	Yes
Does the applicant acknowledge that the Village shall not renew a Class 6b incentive after the initial 12-year Class 6b assessment time period has expired?	Yes
Does the applicant agree to tie the property tax relief from the Class 6b classification to a specific business(es) locating and remaining on the subject property for length of the 12-year Class 6b assessment time period?	Yes
The applicant must acknowledge that it must enter into an agreement with the Village setting the terms and conditions for the Village's support and consent to the Class 6b classification	Yes

Property Information
2525 Shermer Road
Northbrook, Illinois 60062
PINs: 04-22-100-038-0000 and 04-22-100-040-0000

The Subject Property features a 180,000 square foot industrial building and parking spaces on approximately 869,714 square feet of land.

Attached hereto please find:

- Legal Description
- Marketing Brochure
- Aerial of Subject Property
- Street View of the Subject Property
- Tax Bills
- Tax Appeal History

LEGAL DESCRIPTION

Parcels 1 through 6 in the Plat of Service Plaza Consolidation, being a consolidation of parcels of land in the Northwest ¼ of Section 22, Township 42 North, Range 12 East of the Third Principal Meridian, in Cook County, Illinois, which Plat thereof was recorded July 11, 1975 as document number 23147229.

Lot 2 in Bergwerf's Resubdivision, being a Resubdivision of Lot 7 in Service Plaza Consolidation and the North 100.0 feet of the West 249.33 feet of that part of the South 400.0 feet of the North Half of the Northwest Quarter of section 22, Township 42 North, Range 12, East of the Third Principal Meridian, lying Westerly of the right of way of the Chicago and Northwestern Railroad, (except those parts taken for highway purposes), according to the Plat of said Resubdivision recorded October 31, 1988 as Document Number 88501468, in Cook County, Illinois.

Common Address: 2525 Shermer Road, Northbrook, Illinois 60062
PINs: 04-22-100-038-0000 and 04-22-100-040-0000

2525 Shermer Road

Northbrook, IL

2525 Shermer Road

Northbrook, IL

[CBRE Properties: 2525 Shermer Road](#)

± 180,000 SF Available | I2 - Light Industrial Zoning



± 180,000 SF For Sale

2525 Shermer Road | Northbrook, IL

± 180,000 SF

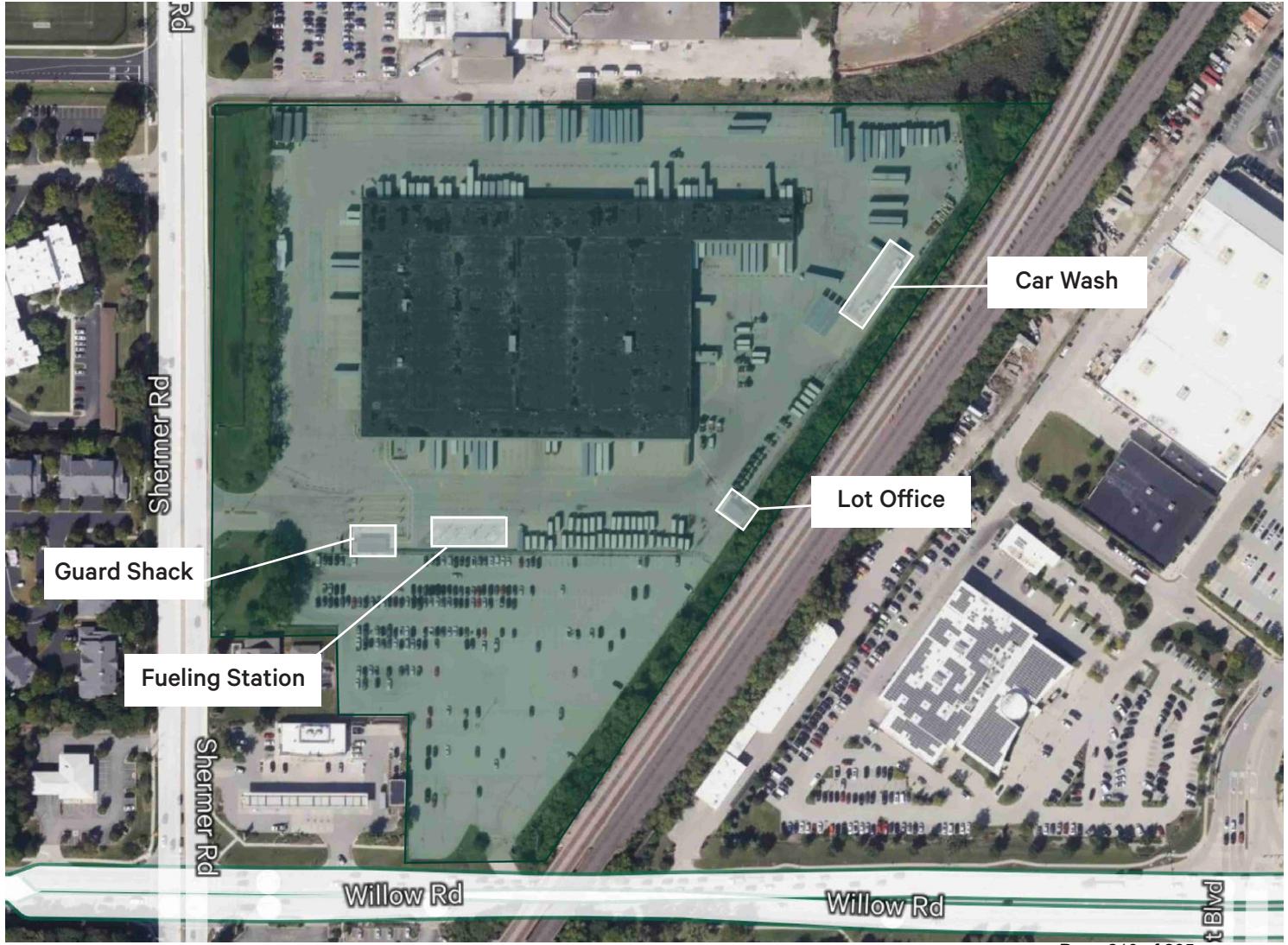
Available For Sale

2525 Shermer Road, located in Northbrook, IL is available for Sale. The gated ± 180,000 SF building features ± 130 elevated docks, ± 3 drive-in doors, floor drains located throughout, ample trailer parking, and heavy car parking.

Conveniently located in Cook County, 2 miles to Full Interchange to I-294. 4 miles to I-94 Full Interchange via Willow Road.

Building Specifications

Total Building	± 180,000 SF (to be confirmed)
Parcel Size	± 20 Acres
Year Built	1984
Loading	Docks: ± 130 (elevated platform) Drive-In Doors: ± 3
Clear Height	19'
Sprinklered	Yes
Parking	Heavy
Power	2,500 Amps
Sale Price	Subject to Offer



+/-180,000 SF For Sale

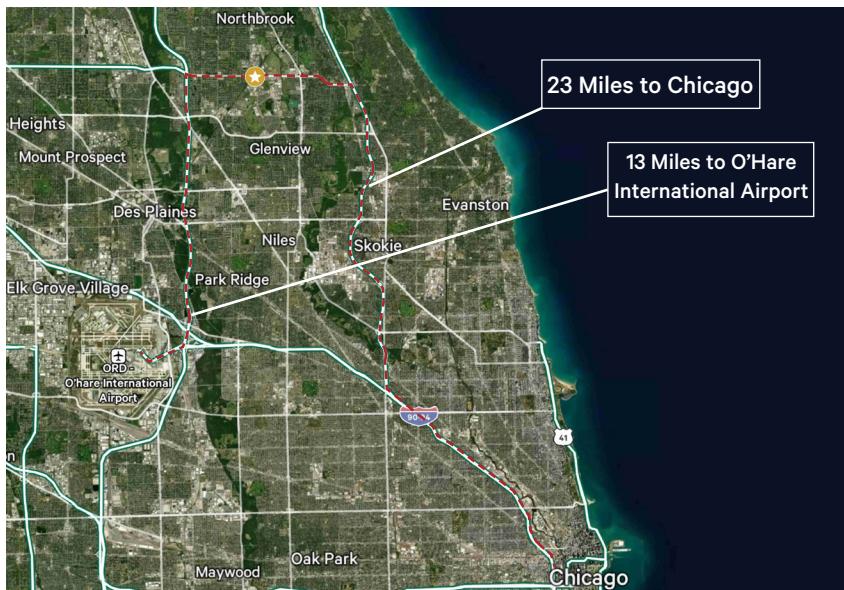
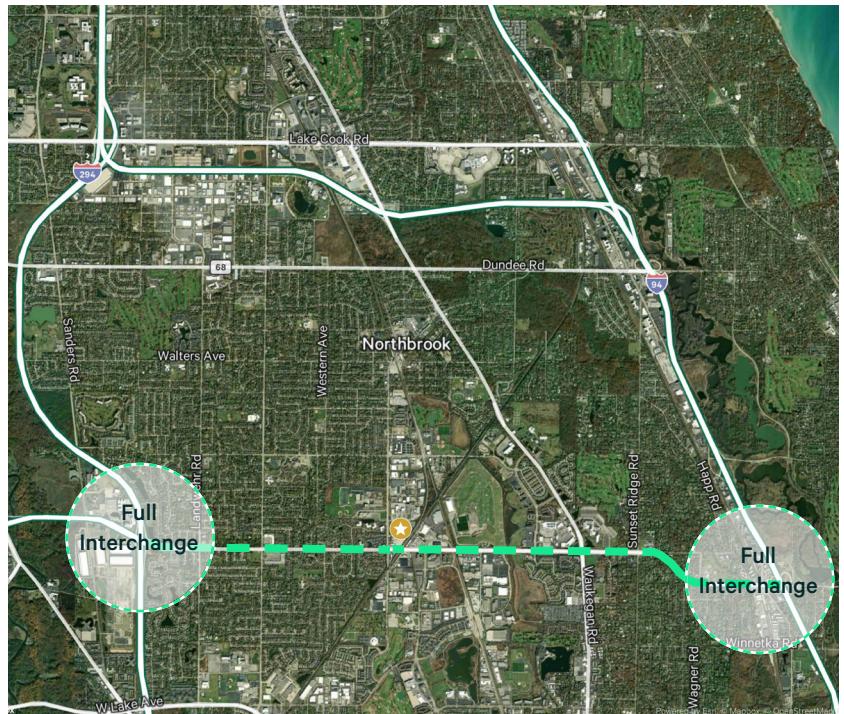
2525 Shermer Road | Northbrook, IL

For Sale

Immediate Availability

2525 Shermer Road is conveniently located in Cook County, 2 miles to Full Interchange to I-294. 4 miles to I-94 Full Interchange via Willow Road.

- + 2 miles to four-way I-294 Interchange
- + Close to different amenities and retail
- + I-2 Zoning
- + 23 Miles to Chicago
- + 13 Miles to O'Hare International Airport



Contact Us

Jack Fitzpatrick

Senior Associate

+1 847 922 5885

jack.fitzpatrick@cbre.com

Whit Heitman

Senior Vice President

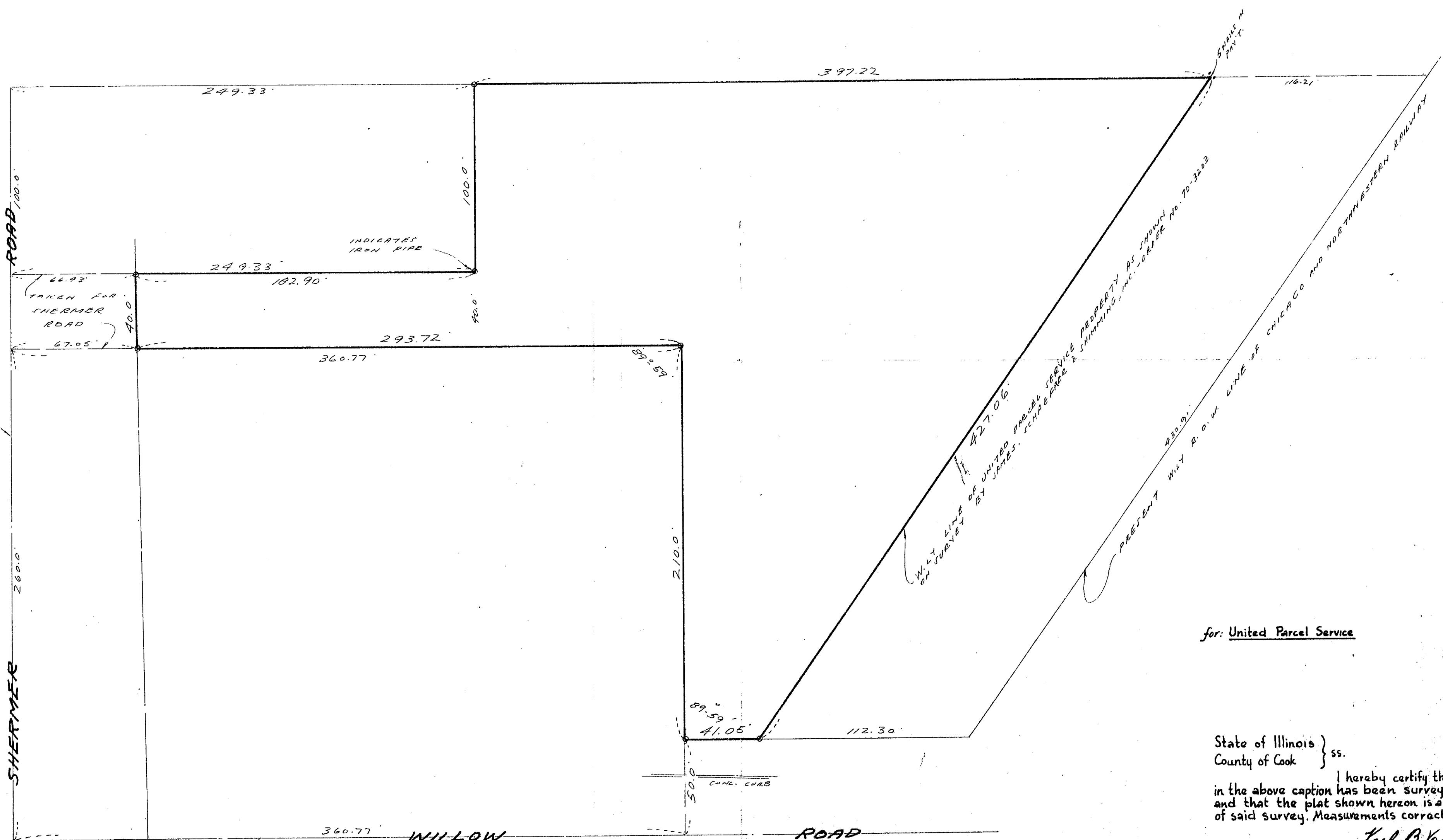
+1 847 624 4947

whit.heitman@cbre.com

© 2025 CBRE, Inc. All rights reserved. This information has been obtained from sources believed reliable, but has not been verified for accuracy or completeness. You should conduct a careful, independent investigation of the property and verify all information. Any reliance on this information is solely at your own risk. CBRE and the CBRE logo are service marks of CBRE, Inc. All other marks displayed on this document are the property of their respective owners, and the use of such logos does not imply any affiliation with or endorsement of CBRE. Photos herein are the property of their respective owners. Use of these images without the express written consent of the owner is prohibited.

plat of Surupy

OF THE NORTH 350.0FT. OF THAT PART OF THE SOUTH 400.0FT. (EXCEPT THE NORTH 100.0FT. OF THE WEST 249.33FT. THEREOF AND EXCEPTING THE SOUTH 210.0 FT. OF THE WEST 360.77FT. THEREOF) OF THE NORTH $\frac{1}{2}$ OF THE NW. $\frac{1}{4}$ OF SEC. 22 - T. 42 N. - R. 12 E. OF THE 3RD P.M., LYING W. 1/2 OF THE W. 1/4 RIGHT OF WAY OF THE FORMER DES PLAINES VALLEY RAILWAY, NOW CHICAGO AND NORTHWESTERN RAILROAD (EXCEPT THAT PART TAKEN FOR HIGHWAY PURPOSES.) IN COOK COUNTY, ILLINOIS.



Compare all points before building by same and immediately report any apparent discrepancy. No dimensions should be assumed by scaling. For building lines refer to your deed, abstract, contract or Building Commissioner.

State of Illinois }
County of Cook } ss.

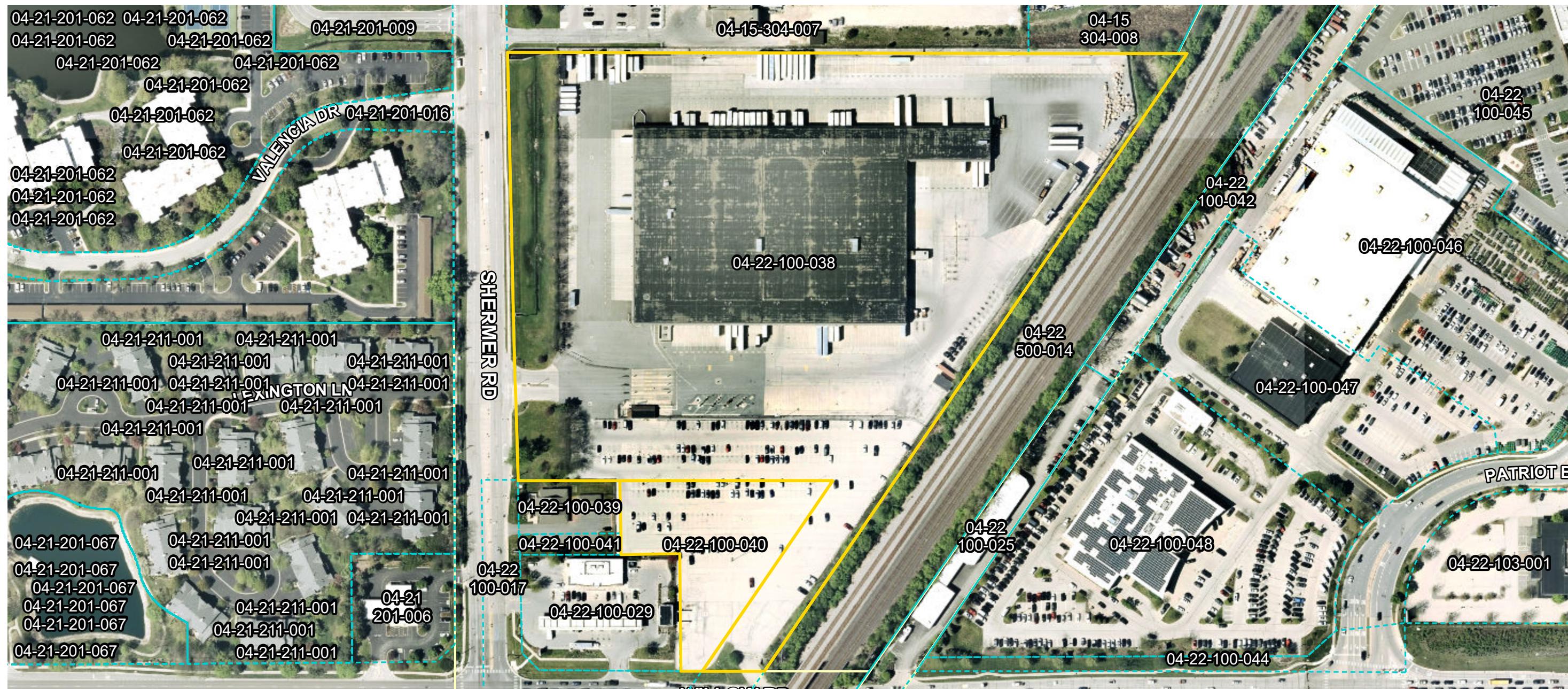
I hereby certify that the property described in the above caption has been surveyed under my direction and that the plat shown hereon is a correct representation of said survey. Measurements corrected to 62° F.

APRIL 2, 1973
NORTHBROOK, ILL.

Karl B. Von Holben
ILLINOIS LAND SURVEYOR, ICP

SUBURBAN SURVEY SERVICE NORTHBROOK, ILL.

FILE NO. 73066-Y-1



Legend

Selected Parcels

Source Parcel

 Parcels Current

0 145 290 580 870 1,160 Feet

Map generated from CookViewer, Cook County's Parcel Viewer application maintained by the Bureau of Technology's GIS Division. For parcel and property identification number (PIN) questions, contact the Cook County Clerk's Office. For property detail and assessment questions, contact the Cook County Assessor's Office. For property tax bill questions, contact the Cook County Treasurer.



Your Property Tax Overview

20-YEAR TAX BILL HISTORY

Property Index Number (PIN): 04-22-100-038-0000

[BEGIN A NEW SEARCH](#)



[Incorrect Image? Click Here.](#)

Property Location:

2525 SHERMER RD
NORTHBROOK, IL 60062-0000

Volume: 132

Mailing Information:

UPS RE DEPT
55 GLENLAKE PARKWAY
ATLANTA, GA 30328-3474

[Update Your Information](#)

20-Year Property Tax Bill History

Tax Year 2004: \$307,567.10

Tax Year 2024: \$590,364.73

Difference: **+ \$282,797.63**

Percent Change: **+ 91.95%**



[Read "The Pappas Study" 20-Year Property Tax History](#)



[See the Top 50 Largest Tax Increases since 2000 by Chicago ward and suburb](#)



[Voter Turnout 2011-2020 Chicago and Cook County Suburbs](#)



[Cook County Suburbs - Interactive Map](#)



[Chicago by Ward - Interactive Map](#)

The due dates and billed amounts for Tax Year 2004 (payable in 2005) through Tax Year 2023 (payable in 2024) are shown below.

The amounts displayed before Tax Year 2023 are for informational purposes only. The Treasurer's Office makes no warranties as to the accuracy of this information. For official records for these years, please contact the [Cook County Clerk's Office](#).

For details about payments starting with Tax Year 2023, visit [Your Property Tax Overview](#).

20-Year Property Tax Bill History (General Taxes)

Tax Year	Total Billed Amount	Total Paid Amount	Installment Billed Amount
Due Date			
2024	\$590,364.73	\$310,172.81	1st 2nd
\$310,172.81	03/04/2025		
\$280,191.92	12/15/2025		
2023	\$563,950.57	\$563,950.57	1st 2nd
\$301,724.87	03/01/2024		
\$262,225.70	08/01/2024		
2022	\$548,590.67	\$548,590.67	1st 2nd
\$223,254.42	04/03/2023		
\$325,336.25	12/01/2023		
2021	\$405,917.12	\$405,917.12	1st 2nd
\$221,042.64	03/01/2022		
\$184,874.48	12/30/2022		
2020	\$392,632.01	\$401,895.70	1st 2nd
\$203,812.71	03/02/2021		
\$188,819.30	10/01/2021		
2019	\$353,188.78	\$370,568.56	1st 2nd
\$185,597.99	03/03/2020		
\$167,590.79	08/03/2020		
2018	\$325,745.85	\$337,450.89	1st 2nd
\$181,781.76	03/01/2019		
\$143,964.09	08/01/2019		
2017	\$319,048.18	\$330,512.29	1st 2nd
\$163,533.09	03/01/2018		
\$155,515.09	08/01/2018		
2016	\$287,019.57	\$297,332.89	1st 2nd
\$183,012.24	03/01/2017		
\$104,007.33	08/01/2017		

▼	2015	\$318,649.62	\$332,749.53	1st 2nd
	\$178,450.76	03/01/2016		
	\$140,198.86	08/01/2016		
▼	2014	\$310,707.44	\$324,455.93	1st 2nd
	\$176,164.02	03/03/2015		
	\$134,543.42	08/01/2015		
▼	2013	\$306,725.93	\$320,298.21	1st 2nd
	\$201,199.45	03/04/2014		
	\$105,526.48	08/01/2014		
▼	2012	\$312,228.37	\$365,817.18	1st 2nd
	\$189,383.74	03/01/2013		
	\$122,844.63	08/01/2013		
▼	2011	\$344,334.08	\$344,334.08	1st 2nd
	\$182,617.34	03/01/2012		
	\$161,716.74	08/01/2012		
▼	2010	\$283,392.00	\$332,031.53	1st 2nd
	\$154,259.30	04/01/2011		
	\$129,132.70	11/01/2011		
▼	2009	\$266,217.01	\$280,471.45	1st 2nd
	\$193,275.21	03/02/2010		
	\$72,941.80	12/13/2010		
▼	2008	\$333,442.98	\$351,409.48	1st 2nd
	\$174,130.72	03/01/2009		
	\$159,312.26	12/01/2009		
▼	2007	\$330,455.88	\$348,261.43	1st 2nd
	\$162,262.23	03/01/2008		
	\$168,193.65	11/03/2008		
▼	2006	\$307,230.95	\$324,524.45	1st 2nd
	\$156,602.59	03/01/2007		
	\$150,628.36	12/03/2007		
▼	2005	\$296,514.81	\$313,205.17	1st 2nd
	\$153,783.55	03/01/2006		

\$142,731.26 09/01/2006

▼	2004	\$307,567.10	\$307,567.10	1st
				2nd
	\$155,003.63	03/01/2005		
	\$152,563.47	11/01/2005		

[BEGIN A NEW SEARCH](#)

DISCLAIMER: The information on this screen comes from many sources, few of which are in the control of the Cook County Treasurer's Office. Taxpayers are advised to take personal responsibility for their PIN, property location, taxpayer address, and payment amounts posted due or paid, to be sure of their accuracy.

Your Property Tax Overview

20-YEAR TAX BILL HISTORY

Property Index Number (PIN): 04-22-100-040-0000

[BEGIN A NEW SEARCH](#)



[Incorrect Image? Click Here.](#)

Property Location:

2525 SHERMER RD
NORTHBROOK, IL 60062-0000

Volume: 132

Mailing Information:

UPS RE DEPT
55 GLENLAKE PARKWAY
ATLANTA, GA 30328-3474

[Update Your Information](#)

20-Year Property Tax Bill History

Tax Year 2004: \$17,709.86

Tax Year 2024: \$31,862.70

Difference: **+ \$14,152.84**

Percent Change: **+ 79.92%**



[Read "The Pappas Study" 20-Year Property Tax History](#)



[See the Top 50 Largest Tax Increases since 2000 by Chicago ward and suburb](#)



[Voter Turnout 2011-2020 Chicago and Cook County Suburbs](#)



[Cook County Suburbs - Interactive Map](#)



[Chicago by Ward - Interactive Map](#)

The due dates and billed amounts for Tax Year 2004 (payable in 2005) through Tax Year 2023 (payable in 2024) are shown below.

The amounts displayed before Tax Year 2023 are for informational purposes only. The Treasurer's Office makes no warranties as to the accuracy of this information. For official records for these years, please contact the [Cook County Clerk's Office](#).

For details about payments starting with Tax Year 2023, visit [Your Property Tax Overview](#).

20-Year Property Tax Bill History (General Taxes)

Tax Year	Total Billed Amount	Total Paid Amount	Installment	
			Billed Amount	Due Date
Due Date				
2024	\$31,862.70	\$16,740.30	1st 2nd	
	\$16,740.30	03/04/2025		
	\$15,122.40	12/15/2025		
2023	\$30,436.90	\$30,436.90	1st 2nd	
	\$16,284.33	03/01/2024		
	\$14,152.57	08/01/2024		
2022	\$29,607.88	\$29,607.88	1st 2nd	
	\$19,147.58	04/03/2023		
	\$10,460.30	12/01/2023		
2021	\$34,813.78	\$34,813.78	1st 2nd	
	\$18,957.87	03/01/2022		
	\$15,855.91	12/30/2022		
2020	\$34,468.86	\$34,468.86	1st 2nd	
	\$16,606.05	03/02/2021		
	\$17,862.81	10/01/2021		
2019	\$30,192.81	\$30,192.81	1st 2nd	
	\$11,862.16	03/03/2020		
	\$18,330.65	08/03/2020		
2018	\$21,567.56	\$21,567.56	1st 2nd	
	\$11,618.24	03/01/2019		
	\$9,949.32	08/01/2019		
2017	\$21,124.08	\$21,124.08	1st 2nd	
	\$10,451.91	03/01/2018		
	\$10,672.17	08/01/2018		
2016	\$19,003.47	\$19,003.47	1st 2nd	
	\$10,285.20	03/01/2017		
	\$8,718.27	08/01/2017		

▼	2015	\$18,700.36	\$18,700.36	1st 2nd
	\$10,028.84	03/01/2016		
	\$8,671.52	08/01/2016		
▼	2014	\$18,234.26	\$18,234.26	1st 2nd
	\$9,900.32	03/03/2015		
	\$8,333.94	08/01/2015		
▼	2013	\$18,000.59	\$18,000.59	1st 2nd
	\$10,084.18	03/04/2014		
	\$7,916.41	08/01/2014		
▼	2012	\$18,334.88	\$18,334.88	1st 2nd
	\$9,491.97	03/01/2013		
	\$8,842.91	08/01/2013		
▼	2011	\$17,258.12	\$17,258.12	1st 2nd
	\$9,152.84	03/01/2012		
	\$8,105.28	08/01/2012		
▼	2010	\$16,641.52	\$16,641.52	1st 2nd
	\$7,777.41	04/01/2011		
	\$8,864.11	11/01/2011		
▼	2009	\$14,140.74	\$14,140.74	1st 2nd
	\$10,953.95	03/02/2010		
	\$3,186.79	12/13/2010		
▼	2008	\$19,916.27	\$19,916.27	1st 2nd
	\$9,868.94	03/01/2009		
	\$10,047.33	12/01/2009		
▼	2007	\$19,737.87	\$19,737.87	1st 2nd
	\$9,343.13	03/01/2008		
	\$10,394.74	11/03/2008		
▼	2006	\$18,686.25	\$18,686.25	1st 2nd
	\$9,017.24	03/01/2007		
	\$9,669.01	12/03/2007		
▼	2005	\$18,034.48	\$18,034.48	1st 2nd
	\$8,854.93	03/01/2006		

\$9,179.55 09/01/2006

▼	2004	\$17,709.86	\$17,709.86	1st 2nd
		\$8,691.28	03/01/2005	
		\$9,018.58	11/01/2005	

[BEGIN A NEW SEARCH](#)

DISCLAIMER: The information on this screen comes from many sources, few of which are in the control of the Cook County Treasurer's Office. Taxpayers are advised to take personal responsibility for their PIN, property location, taxpayer address, and payment amounts posted due or paid, to be sure of their accuracy.

BOARD OF REVIEW DECISION SEARCH

Property Information

Address: 2525 SHERMER RD, NORTHBROOK

PIN: 04-22-100-038-0000

Current Year 2025

COMPLAINT	TYPE	CLASS	ASSESSOR TOTAL
2515283.001	A - ADD	5-93	\$2,611,767

Appeal History

2024 Decision Information

Complaint: 2515680.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2024	2515680	\$1,344,762	\$1,041,252	\$2,386,014	\$1,344,762	\$1,041,252	\$2,386,014
2023		\$1,344,762	\$1,041,247	\$2,386,009	\$1,344,762	\$1,041,247	\$2,386,009
2022		\$1,344,762	\$1,973,543	\$3,318,305	\$1,344,762	\$1,041,247	\$2,386,009
2021		\$1,344,762	\$218,240	\$1,563,002	\$1,344,762	\$218,240	\$1,563,002
2020		\$1,344,762	\$218,240	\$1,563,002	\$1,344,762	\$218,240	\$1,563,002

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2023 Decision Information

Complaint: 2516155.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2023	2516155	\$1,344,762	\$1,041,247	\$2,386,009	\$1,344,762	\$1,041,247	\$2,386,009
2022	2518730	\$1,344,762	\$1,973,543	\$3,318,305	\$1,344,762	\$1,041,247	\$2,386,009
2021	2516402	\$1,344,762	\$218,240	\$1,563,002	\$1,344,762	\$218,240	\$1,563,002
2020	2516150	\$1,344,762	\$218,240	\$1,563,002	\$1,344,762	\$218,240	\$1,563,002
2019	2519588	\$1,344,762	\$639,387	\$1,984,149	\$1,344,762	\$300,514	\$1,645,276

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2022 Decision Information

Complaint: 2518730.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2022	2518730	\$1,344,762	\$1,973,543	\$3,318,305	\$1,344,762	\$1,041,247	\$2,386,009
2021	2516402	\$1,344,762	\$218,240	\$1,563,002	\$1,344,762	\$218,240	\$1,563,002

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2020	2516150	\$1,344,762	\$218,240	\$1,563,002	\$1,344,762	\$218,240	\$1,563,002
2019	2519588	\$1,344,762	\$639,387	\$1,984,149	\$1,344,762	\$300,514	\$1,645,276
2018	2515192	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548

Change Reason

The Decrease is the result of: Consideration given to cost, income, or market date, and/or your appraisal.

2021 Decision Information

Complaint: 2516402.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2021	2516402	\$1,344,762	\$218,240	\$1,563,002	\$1,344,762	\$218,240	\$1,563,002
2020	2516150	\$1,344,762	\$218,240	\$1,563,002	\$1,344,762	\$218,240	\$1,563,002
2019	2519588	\$1,344,762	\$639,387	\$1,984,149	\$1,344,762	\$300,514	\$1,645,276
2018	2515192	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548
2017	2516138	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2020 Decision Information

Complaint: 2516150.001

Appellant: UNITED PARCEL SERVICE

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2020	2516150	\$1,344,762	\$218,240	\$1,563,002	\$1,344,762	\$218,240	\$1,563,002
2019	2519588	\$1,344,762	\$639,387	\$1,984,149	\$1,344,762	\$300,514	\$1,645,276
2018	2515192	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548
2017	2516138	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548
2016	2519997	\$846,702	\$636,173	\$1,482,875	\$846,702	\$535,846	\$1,382,548

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2019 Decision Information

Complaint: 2519588.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2019	2519588	\$1,344,762	\$639,387	\$1,984,149	\$1,344,762	\$300,514	\$1,645,276
2018	2515192	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548
2017	2516138	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548
2016	2519997	\$846,702	\$636,173	\$1,482,875	\$846,702	\$535,846	\$1,382,548
2015	2512842	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673

Change Reason

The Decrease is the result of: Consideration given to cost, income, or market date, and/or your appraisal.

2018 Decision Information

Complaint: 2515192.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2018	2515192	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548
2017	2516138	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548
2016	2519997	\$846,702	\$636,173	\$1,482,875	\$846,702	\$535,846	\$1,382,548
2015	2512842	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2014	2502149	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2017 Decision Information

Complaint: 2516138.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2017	2516138	\$846,702	\$535,846	\$1,382,548	\$846,702	\$535,846	\$1,382,548
2016	2519997	\$846,702	\$636,173	\$1,482,875	\$846,702	\$535,846	\$1,382,548
2015	2512842	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2014	2502149	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2013	2505944	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2016 Decision Information

Complaint: 2519997.001

Appellant: UPS

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2016	2519997	\$846,702	\$636,173	\$1,482,875	\$846,702	\$535,846	\$1,382,548
2015	2512842	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2014	2502149	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2013	2505944	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2012	2502188	\$747,090	\$969,900	\$1,716,990	\$747,090	\$969,900	\$1,716,990

Change Reason

The Decrease is the result of: Consideration given to cost, income, or market date, and/or your appraisal.

2015 Decision Information

Complaint: 2512842.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2015	2512842	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2014	2502149	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2013	2505944	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2012	2502188	\$747,090	\$969,900	\$1,716,990	\$747,090	\$969,900	\$1,716,990
2011		\$747,090	\$969,900	\$1,716,990	\$747,090	\$969,900	\$1,716,990

No Change Reason

The No Change is the result of: This parcel is currently the subject of a matter pending before PTAB for a prior year or the Assessor held prior Board of Review action.

2014 Decision Information

Complaint: 2502149.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK&VIHON #3010)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2014	2502149	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2013	2505944	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2012	2502188	\$747,090	\$969,900	\$1,716,990	\$747,090	\$969,900	\$1,716,990
2011		\$747,090	\$969,900	\$1,716,990	\$747,090	\$969,900	\$1,716,990
2010	0233492	\$747,090	\$1,202,878	\$1,949,968	\$747,090	\$969,900	\$1,716,990

No Change Reason

The No Change is the result of: This parcel is currently the subject of a matter pending before PTAB for a prior year or the Assessor held prior Board of Review action.

2013 Decision Information

Complaint: 2505944.001

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK&VIHON #3010)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2013	2505944	\$747,090	\$642,583	\$1,389,673	\$747,090	\$642,583	\$1,389,673
2012	2502188	\$747,090	\$969,900	\$1,716,990	\$747,090	\$969,900	\$1,716,990
2011		\$747,090	\$969,900	\$1,716,990	\$747,090	\$969,900	\$1,716,990
2010	0233492	\$747,090	\$1,202,878	\$1,949,968	\$747,090	\$969,900	\$1,716,990
2009	0127484	\$747,090	\$1,516,068	\$2,263,158	\$747,090	\$833,903	\$1,580,993

No Change Reason

The No Change is the result of: Consideration given to cost, income, or market data and/or your appraisal.

2012 Decision Information

Complaint: 2502188.001

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2012	2502188	\$747,090	\$969,900	\$1,716,990	\$747,090	\$969,900	\$1,716,990
2011		\$747,090	\$969,900	\$1,716,990	\$747,090	\$969,900	\$1,716,990
2010	0233492	\$747,090	\$1,202,878	\$1,949,968	\$747,090	\$969,900	\$1,716,990
2009	0127484	\$747,090	\$1,516,068	\$2,263,158	\$747,090	\$833,903	\$1,580,993
2008	0184030	\$1,075,809	\$1,187,342	\$2,263,151	\$1,075,809	\$1,187,342	\$2,263,151

No Change Reason

The No Change is the result of: Consideration given to cost, income, or market data and/or your appraisal.

2010 Decision Information

Complaint: 0233492.001

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2010	0233492	\$747,090	\$1,202,878	\$1,949,968	\$747,090	\$969,900	\$1,716,990
2009	0127484	\$747,090	\$1,516,068	\$2,263,158	\$747,090	\$833,903	\$1,580,993
2008	0184030	\$1,075,809	\$1,187,342	\$2,263,151	\$1,075,809	\$1,187,342	\$2,263,151
2007	0191313	\$1,075,809	\$1,356,318	\$2,432,127	\$1,075,809	\$1,187,342	\$2,263,151
2006	0172083	\$1,075,809	\$862,368	\$1,938,177	\$1,075,809	\$862,368	\$1,938,177

Change Reason

The Decrease is the result of: Consideration given to cost, income, or market date, and/or your appraisal.

2009 Decision Information

Complaint: 0127484.001

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2009	0127484	\$747,090	\$1,516,068	\$2,263,158	\$747,090	\$833,903	\$1,580,993
2008	0184030	\$1,075,809	\$1,187,342	\$2,263,151	\$1,075,809	\$1,187,342	\$2,263,151
2007	0191313	\$1,075,809	\$1,356,318	\$2,432,127	\$1,075,809	\$1,187,342	\$2,263,151
2006	0172083	\$1,075,809	\$862,368	\$1,938,177	\$1,075,809	\$862,368	\$1,938,177
2005	0167272	\$1,075,809	\$862,368	\$1,938,177	\$1,075,809	\$862,368	\$1,938,177

Change Reason

The Decrease is the result of: A value supported by Assessor's Recommendation or restoration or prior Cook County Board of Review, PTAB, or Specific Tax Objection lawsuit decision.

2008 Decision Information

Complaint: 0184030.001

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2008	0184030	\$1,075,809	\$1,187,342	\$2,263,151	\$1,075,809	\$1,187,342	\$2,263,151
2007	0191313	\$1,075,809	\$1,356,318	\$2,432,127	\$1,075,809	\$1,187,342	\$2,263,151
2006	0172083	\$1,075,809	\$862,368	\$1,938,177	\$1,075,809	\$862,368	\$1,938,177
2005	0167272	\$1,075,809	\$862,368	\$1,938,177	\$1,075,809	\$862,368	\$1,938,177
2004	0172157	\$1,075,809	\$1,117,750	\$2,193,559	\$1,075,809	\$862,368	\$1,938,177

No Change Reason

The No Change is the result of: This parcel is currently the subject of a matter pending before PTAB for a prior year or the Assessor held prior Board of Review action.

2007 Decision Information

Complaint: 0191313.001

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2007	0191313	\$1,075,809	\$1,356,318	\$2,432,127	\$1,075,809	\$1,187,342	\$2,263,151

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2006	0172083	\$1,075,809	\$862,368	\$1,938,177	\$1,075,809	\$862,368	\$1,938,177
2005	0167272	\$1,075,809	\$862,368	\$1,938,177	\$1,075,809	\$862,368	\$1,938,177
2004	0172157	\$1,075,809	\$1,117,750	\$2,193,559	\$1,075,809	\$862,368	\$1,938,177
2003		\$1,004,088	\$807,461	\$1,811,549	\$1,004,088	\$807,461	\$1,811,549

Change Reason

The Decrease is the result of: Consideration given to cost, income, or market date, and/or your appraisal.

BOARD OF REVIEW DECISION SEARCH

Property Information

Address: 2525 SHERMER RD, NORTHBROOK

PIN: 04-22-100-040-0000

Current Year 2025

COMPLAINT	TYPE	CLASS	ASSESSOR TOTAL
2515283.002	A - ADD	5-80	\$221,699

Appeal History

2024 Decision Information

Complaint: 2515680.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2024	2515680	\$122,882	\$5,894	\$128,776	\$122,882	\$5,894	\$128,776
2023		\$122,882	\$5,893	\$128,775	\$122,882	\$5,893	\$128,775
2022		\$122,882	\$11,170	\$134,052	\$122,882	\$5,893	\$128,775
2021		\$122,882	\$11,170	\$134,052	\$122,882	\$11,170	\$134,052
2020		\$122,882	\$11,170	\$134,052	\$122,882	\$11,170	\$134,052

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2023 Decision Information

Complaint: 2516155.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2023	2516155	\$122,882	\$5,893	\$128,775	\$122,882	\$5,893	\$128,775
2022	2518730	\$122,882	\$11,170	\$134,052	\$122,882	\$5,893	\$128,775
2021	2516402	\$122,882	\$11,170	\$134,052	\$122,882	\$11,170	\$134,052
2020	2516150	\$122,882	\$11,170	\$134,052	\$122,882	\$11,170	\$134,052
2019	2519588	\$122,882	\$23,766	\$146,648	\$122,882	\$11,170	\$134,052

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2022 Decision Information

Complaint: 2518730.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2022	2518730	\$122,882	\$11,170	\$134,052	\$122,882	\$5,893	\$128,775
2021	2516402	\$122,882	\$11,170	\$134,052	\$122,882	\$11,170	\$134,052

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2020	2516150	\$122,882	\$11,170	\$134,052	\$122,882	\$11,170	\$134,052
2019	2519588	\$122,882	\$23,766	\$146,648	\$122,882	\$11,170	\$134,052
2018	2515192	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363

Change Reason

The Decrease is the result of: Consideration given to cost, income, or market date, and/or your appraisal.

2021 Decision Information

Complaint: 2516402.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2021	2516402	\$122,882	\$11,170	\$134,052	\$122,882	\$11,170	\$134,052
2020	2516150	\$122,882	\$11,170	\$134,052	\$122,882	\$11,170	\$134,052
2019	2519588	\$122,882	\$23,766	\$146,648	\$122,882	\$11,170	\$134,052
2018	2515192	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363
2017	2516138	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2020 Decision Information

Complaint: 2516150.002

Appellant: UNITED PARCEL SERVICE

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2020	2516150	\$122,882	\$11,170	\$134,052	\$122,882	\$11,170	\$134,052
2019	2519588	\$122,882	\$23,766	\$146,648	\$122,882	\$11,170	\$134,052
2018	2515192	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363
2017	2516138	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363
2016	2519997	\$77,370	\$13,051	\$90,421	\$77,370	\$10,993	\$88,363

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2019 Decision Information

Complaint: 2519588.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2019	2519588	\$122,882	\$23,766	\$146,648	\$122,882	\$11,170	\$134,052
2018	2515192	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363
2017	2516138	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363
2016	2519997	\$77,370	\$13,051	\$90,421	\$77,370	\$10,993	\$88,363
2015	2512842	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099

Change Reason

The Decrease is the result of: Consideration given to cost, income, or market date, and/or your appraisal.

2018 Decision Information

Complaint: 2515192.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2018	2515192	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363
2017	2516138	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363
2016	2519997	\$77,370	\$13,051	\$90,421	\$77,370	\$10,993	\$88,363
2015	2512842	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2014	2502149	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2017 Decision Information

Complaint: 2516138.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2017	2516138	\$77,370	\$10,993	\$88,363	\$77,370	\$10,993	\$88,363
2016	2519997	\$77,370	\$13,051	\$90,421	\$77,370	\$10,993	\$88,363
2015	2512842	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2014	2502149	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2013	2505944	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099

No Change Reason

The No Change is the result of: Exhausting Administrative Remedies.

2016 Decision Information

Complaint: 2519997.002

Appellant: UPS

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2016	2519997	\$77,370	\$13,051	\$90,421	\$77,370	\$10,993	\$88,363
2015	2512842	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2014	2502149	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2013	2505944	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2012	2502188	\$68,267	\$17,789	\$86,056	\$68,267	\$17,789	\$86,056

Change Reason

The Decrease is the result of: Consideration given to cost, income, or market date, and/or your appraisal.

2015 Decision Information

Complaint: 2512842.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK & VIHON LLP)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2015	2512842	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2014	2502149	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2013	2505944	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2012	2502188	\$68,267	\$17,789	\$86,056	\$68,267	\$17,789	\$86,056
2011		\$68,267	\$17,789	\$86,056	\$68,267	\$17,789	\$86,056

No Change Reason

The No Change is the result of: This parcel is currently the subject of a matter pending before PTAB for a prior year or the Assessor held prior Board of Review action.

2014 Decision Information

Complaint: 2502149.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK&VIHON #3010)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2014	2502149	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2013	2505944	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2012	2502188	\$68,267	\$17,789	\$86,056	\$68,267	\$17,789	\$86,056
2011		\$68,267	\$17,789	\$86,056	\$68,267	\$17,789	\$86,056
2010	0233492	\$68,267	\$22,063	\$90,330	\$68,267	\$17,789	\$86,056

No Change Reason

The No Change is the result of: This parcel is currently the subject of a matter pending before PTAB for a prior year or the Assessor held prior Board of Review action.

2013 Decision Information

Complaint: 2505944.002

Appellant: UNITED PARCEL SERVICE

Attorney: O'MALLEY, FRANCIS W (WORSEK&VIHON #3010)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2013	2505944	\$68,267	\$9,832	\$78,099	\$68,267	\$9,832	\$78,099
2012	2502188	\$68,267	\$17,789	\$86,056	\$68,267	\$17,789	\$86,056
2011		\$68,267	\$17,789	\$86,056	\$68,267	\$17,789	\$86,056
2010	0233492	\$68,267	\$22,063	\$90,330	\$68,267	\$17,789	\$86,056
2009	0127484	\$68,267	\$20,805	\$89,072	\$68,267	\$11,443	\$79,710

No Change Reason

The No Change is the result of: Consideration given to cost, income, or market data and/or your appraisal.

2012 Decision Information

Complaint: 2502188.002

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2012	2502188	\$68,267	\$17,789	\$86,056	\$68,267	\$17,789	\$86,056
2011		\$68,267	\$17,789	\$86,056	\$68,267	\$17,789	\$86,056
2010	0233492	\$68,267	\$22,063	\$90,330	\$68,267	\$17,789	\$86,056
2009	0127484	\$68,267	\$20,805	\$89,072	\$68,267	\$11,443	\$79,710
2008	0184030	\$98,305	\$29,960	\$128,265	\$98,305	\$29,960	\$128,265

No Change Reason

The No Change is the result of: Consideration given to cost, income, or market data and/or your appraisal.

2010 Decision Information

Complaint: 0233492.002

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2010	0233492	\$68,267	\$22,063	\$90,330	\$68,267	\$17,789	\$86,056
2009	0127484	\$68,267	\$20,805	\$89,072	\$68,267	\$11,443	\$79,710
2008	0184030	\$98,305	\$29,960	\$128,265	\$98,305	\$29,960	\$128,265
2007	0191313	\$98,305	\$34,224	\$132,529	\$98,305	\$29,960	\$128,265
2006	0172083	\$85,197	\$26,404	\$111,601	\$85,197	\$26,404	\$111,601

Change Reason

The Decrease is the result of: Consideration given to cost, income, or market date, and/or your appraisal.

2009 Decision Information

Complaint: 0127484.002

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2009	0127484	\$68,267	\$20,805	\$89,072	\$68,267	\$11,443	\$79,710
2008	0184030	\$98,305	\$29,960	\$128,265	\$98,305	\$29,960	\$128,265
2007	0191313	\$98,305	\$34,224	\$132,529	\$98,305	\$29,960	\$128,265
2006	0172083	\$85,197	\$26,404	\$111,601	\$85,197	\$26,404	\$111,601
2005	0167272	\$85,197	\$26,404	\$111,601	\$85,197	\$26,404	\$111,601

Change Reason

The Decrease is the result of: A value supported by Assessor's Recommendation or restoration or prior Cook County Board of Review, PTAB, or Specific Tax Objection lawsuit decision.

2008 Decision Information

Complaint: 0184030.002

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2008	0184030	\$98,305	\$29,960	\$128,265	\$98,305	\$29,960	\$128,265
2007	0191313	\$98,305	\$34,224	\$132,529	\$98,305	\$29,960	\$128,265
2006	0172083	\$85,197	\$26,404	\$111,601	\$85,197	\$26,404	\$111,601
2005	0167272	\$85,197	\$26,404	\$111,601	\$85,197	\$26,404	\$111,601
2004	0172157	\$85,197	\$34,224	\$119,421	\$85,197	\$26,404	\$111,601

No Change Reason

The No Change is the result of: This parcel is currently the subject of a matter pending before PTAB for a prior year or the Assessor held prior Board of Review action.

2007 Decision Information

Complaint: 0191313.002

Appellant: UNITED PARCEL SERVICE

Attorney: MCNULTY, THOMAS J (NEAL GERBER EISENBERG)

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2007	0191313	\$98,305	\$34,224	\$132,529	\$98,305	\$29,960	\$128,265

YEAR	COMPL#	ASSESSOR			BOARD OF REVIEW		
		LAND	IMPRV.	TOTAL	LAND	IMPRV.	TOTAL
2006	0172083	\$85,197	\$26,404	\$111,601	\$85,197	\$26,404	\$111,601
2005	0167272	\$85,197	\$26,404	\$111,601	\$85,197	\$26,404	\$111,601
2004	0172157	\$85,197	\$34,224	\$119,421	\$85,197	\$26,404	\$111,601
2003		\$78,644	\$22,932	\$101,576	\$78,644	\$22,932	\$101,576

Change Reason

The Decrease is the result of: Analysis of comparable properties, a recent sale, and/or an update of property characteristics.

Identification of Persons Having an Interest in the Property

2525 Shermer Road
Northbrook, Illinois 60062
PINs: 04-22-100-038-0000 and 04-22-100-040-0000

Applicant: Orest Express, Inc.

Occupant: Orest Express, Inc.

Industrial Use & Employment

2525 Shermer Road
Northbrook, Illinois 60062
PINs: 04-22-100-038-0000 and 04-22-100-040-0000

Orest Express will be occupying the Subject Property. Founded in 2004, Orest Express is a family-owned and -operated transportation and logistics company. It specializes in trucking and warehouse services, maintains 9 full-time and 1099 employees, and serves the Midwest and West Coast. Orest Express currently operates at 221 Joey Drive, Elk Grove Village, IL 60007 and is looking to relocate to Subject Property as part of a general expansion of its operations in the Chicagoland area. There, it will engage in warehousing, order fulfillment and distribution, equipment storage, equipment repair, and various administrative activities. As part of the expansion, Orest Express plans to hire 20 additional full-time and 1099 employees at the Subject Property within a 24-month period following relocation. All employees will be compensated in accordance with the Cook County Living Wage.

In addition to increased property tax revenues, the Applicant's presence will significantly benefit the local community. The Applicant expects its employees and visitors to frequent the village's local establishments (including restaurants, gas stations, and retail stores). The Applicant also expects to attract both new and returning customers who will also frequent nearby establishments. According to the below *New Employee Business Impact Chart*, an estimated 20 full-time employees would spend approximately **\$84,750** per year in the village on gas, entertainment, groceries, etc.

New Employee Business Impact Chart					
Purchase	Employees	%	Ex./Week	Weeks	Total
Lunch	20	55%	\$55	50	\$30,250.00
Grocery	20	30%	\$50	50	\$15,000.00
Consumer Goods	20	25%	\$35	50	\$8,750.00
Entertainment	20	15%	\$55	50	\$8,250.00
Auto-Gas	20	75%	\$30	50	\$22,500.00
TOTAL (Per Year)					\$84,750.00

Property Improvements & Fiscal Effect

2525 Shermer Road
Northbrook, Illinois 60062
PINs: 04-22-100-038-0000 and 04-22-100-040-0000

Should the Class 6b Tax Incentive be granted, the Applicant plans to spend over \$1,000,000 on demolition and over \$4,000,000 on various new improvements to the Subject Property. Specifically, the Applicant will spend approximately \$850,000 demolish and recycle the interior conveyor, approximately \$350,000 to demolish the existing office space, \$500,000 to build a new office space, \$2,000,000 upgrade the recessed docks, \$300,000 to install a new HVAC system, \$300,000 to install a new electrical system, \$300,000 to install a new plumbing system, \$300,000 to install a new fire suppression system, and \$500,000 to repair to roof. These planned improvements are expected to create 40-50 temporary construction jobs. All employees will be compensated in accordance with the Cook County Living Wage.

Following construction and subsequent occupation, the Subject Property is projected to have a market value of approximately \$22,500,000 which would generate an estimated \$7,515,492 in total taxes (or approximately \$556,703 per year) over the life of the Class 6b Tax Incentive. Without the incentive, the Subject Property's market value is expected to fall and to generate approximately \$4,979,370 in taxes over the next 12 years (or approximately \$414,948 per year) based on the latest certified market value with full vacancy relief. Therefore, with the Class 6b Tax Incentive, the Subject Property would generate approximately **\$2,536,122** in additional real estate taxes over the life of the Class 6b Tax Incentive. Please see the enclosed *12 Year Tax Comparison Chart* for more details. In total, the construction and reoccupation of the Subject Property could generate approximately **+\$3,500,000** in additional revenue over the life of the incentive.

12 Year Tax Estimates
 2525 Shermer Road
 Northbrook, Illinois 60062
 PINs: 04-22-100-038-0000 and 04-22-100-040-0000

Estimated Taxes Based on:
Purchase Price + Improvement Costs + Class 6b Tax Incentive
Compared to
Final 2024 Assessor Valuation with Full Vacancy Relief and no Class 6b Tax Incentive

Tax Year	2024 Tax Rate	2024 Multiplier	Estimated Effective Tax Rate *
2026	8.151%	3.0355	24.742%
2027	8.151%	3.0355	24.742%
2028	8.151%	3.0355	24.742%
2029	8.151%	3.0355	24.742%
2030	8.151%	3.0355	24.742%
2031	8.151%	3.0355	24.742%
2032	8.151%	3.0355	24.742%
2033	8.151%	3.0355	24.742%
2034	8.151%	3.0355	24.742%
2035	8.151%	3.0355	24.742%
2036	8.151%	3.0355	24.742%
2037	8.151%	3.0355	24.742%

Purchase Price + Hard Costs + Class 6b Tax Incentive			
Estimated Market Value	Assessment Level with a Class 6b **	Estimated Assessed Value With a Class 6b	Estimated Tax With a Class 6b
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	15%	\$3,375,000	\$835,055
\$22,500,000	20%	\$4,500,000	\$1,113,406
Total Estimated Taxes (2026 to 2036)		\$7,515,492	

Final 2024 Assessor Valuation with Full Vacancy Relief and no Class 6b Tax Incentive			
Estimated Market Value with Full Vacancy Relief ***	Assessment Level With NO Class 6b	Estimated Assessed Value with Full vacancy and NO Class 6b	Estimated Taxes at Full Vacancy with NO Class 6b
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
\$6,708,293	25.00%	\$1,677,073	\$414,948
Total Estimated Taxes (2026 to 2036)		\$7,515,492	
			\$4,979,370

Additional Property Tax Revenue Generated Over the Life of the Property's Class 6b Tax Incentive (Versus a Vacant Building & No 6b)	\$2,536,122
------------------------------------------------------------------------------------------------------------------------------------------------	--------------------

Notes:

* The estimates were calculated using the 2024 Tax Rate. The rate does not take into account any increases or decreases in the Effective Tax Rate between 2026 and 2036.

** The above is based on the assumption that the Class 6b Tax Incentive for the subject property will be granted in 2025 and activated in 2026 or 2027

*** A 20% Occupancy Factor was applied to the Final 2024 Assessor Value

The above estimates are speculative, and should be treated as such.

12 Year Tax Estimates

2525 Shermer Road

Northbrook, Illinois 60062

PINs: 04-22-100-038-0000 and 04-22-100-040-0000

Estimated Taxes Based on:

**Purchase Price + Approx. \$4.2M in Improvement Value & a 6b Incentive
Compared to**

Compared to at Full Mass

Current Market Value at Full Vacancy & No 6b Incentive Compared to

Compared to Min. Improve.

Purchase Price + Approx. \$4.2M in Improvement Value & no 6b Incentive

Tax Year	2024 Tax Rate	2024 Multiplier	Estimated Effective Tax Rate*
2026	8.151%	3.0355	24.742%
2027	8.151%	3.0355	24.742%
2028	8.151%	3.0355	24.742%
2029	8.151%	3.0355	24.742%
2030	8.151%	3.0355	24.742%
2031	8.151%	3.0355	24.742%
2032	8.151%	3.0355	24.742%
2033	8.151%	3.0355	24.742%
2034	8.151%	3.0355	24.742%
2035	8.151%	3.0355	24.742%
2036	8.151%	3.0355	24.742%
2037	8.151%	3.0355	24.742%

Purchase Price +Approx. \$4.2M in Improvement Value & a 6b Incentive			
Estimated Market Value	Assessment Level with a Class 6b**	Estimated Assessed Value With a Class 6b	Estimated Tax With a Class 6b
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	10%	\$2,250,000	\$556,703
\$22,500,000	15%	\$3,375,000	\$835,055
\$22,500,000	20%	\$4,500,000	\$1,113,406
Total Estimated Taxes (2026 to 2037)			\$7,515,492

Current Market Value at Full Vacancy & No 6b Incentive			
Estimated Market Value	Assessment Level With NO Class 6b	Estimated Assessed Value Without a Class 6b	Estimated Taxes at Full Vacancy Without a Class 6b
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
\$6,708,293	25%	\$1,677,073	\$414,948
Total Estimated Taxes (2026 to 2037)			\$4,979,370

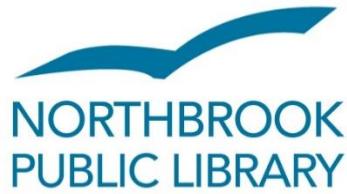
Notes:

* The 2024 Effective Tax Rate (the 2024 tax rate x the 2024 multiplier) was used. It does not take into account any increases or decreases in the Effective Tax Rate between 2026 and 2037.

**The above is based on the assumption that the Class 6b Tax Incentive for the subject property will be granted in 2026 and activated in 2026

***A 20% occupancy factor was applied to the 2025 Assessor Building Assessed Value, which was then added to the 2025 Assessor Land Assessed Value to create a revised 2025 Assessed Value with Total Vacancy Reduction. The revised 2025 Assessed Value with Total Vacancy Reduction was then multiplied by 4 to create the "Estimated Market Value Based on the 2025 Cook County Assessed Value at Full Vacancy and No Improvements"

The above estimates are speculative, and should be treated as such.



Memorandum

DATE: 1/5/25

TO: Board of Trustees

FROM: Kate Hall, Executive Director, & Laurie Prioletti, HR Manager

RE: Executive Director Evaluation Process

The process for my annual review starts with the board reviewing the ED evaluation process. I have included in the packet:

- Executive Director Job Description
- Evaluation process timeline
- Evaluation form

The board will go into executive session to review the process and choose if you want to make any changes.

Executive Director Evaluation

Purpose of the Performance Evaluation

- To provide the Director with a clear understanding of the board's expectations.
- To ensure the Director and the Board are aware of how well the expectations are being met.
- To identify areas for growth as seen by the Board and establish goals based on those areas and based on the strategic plan.
- To demonstrate sound management practices and accountability to the Northbrook taxpayers.

The Evaluation Process

The Library Board of Trustees will conduct an annual performance evaluation of the Executive Director.

January

- Board shall review the evaluation process for the Executive Director to determine whether the process needs to be revised.

February

- The Executive Director will complete a Self-Evaluation detailing how they have met or not met the goals set the previous year.

March

- Each library trustee will complete an evaluation form and discuss and decide as a whole on the final evaluation marks and comments at the March board meeting.
- A Board Member shall create a compiled evaluation form based on the discussion.

April

- The Board will finalize the evaluation, review compensation, and suggest potential goals for the coming year.
- The Board President and Vice President shall meet with the Executive Director to review the evaluation. The Executive Director shall be given the opportunity to ask questions and respond to issues raised in the document.

May

- The Board and Executive Director shall finalize goals for the year.

Evaluation Form

Instructions

Please fill out the evaluation form for each category adding comments for items you would like to highlight.

- FY Goals
- Strategic Plan Goals
- Board Relationships
- Financial Responsibility and Oversight
- Personnel Management & Leadership
- Overall Quality of Library Services
- Community Relations
- Facilities Management

Scoring will be done using the following categories:

Growth Needed (1): Performance does not satisfy minimum job requirements and is below an appropriate level, growth is needed.

Meets Expectations (2): Results/behavior fully meets expectations of the position. Demonstrates a solid command of job. Performs in a reliable and consistent manner.

Highly Effective (3): Demonstrates qualities of excellence on a consistent basis; exercises initiative and thoughtfulness in decision making and actions. Results/behavior exceeds requirements and expectations, acts as a role model and example to others.

No opportunity to observe (N): Unable to assess this category/metric.

FY Goals	Highly Effective (3) Meets Expectations (2) Growth Needed (1)
Delegate Projects and Expand Leadership Team Ownership	
Improve Board Communication by Simplifying and Presenting Options	
Strategic Plan Activities <ul style="list-style-type: none"> • Benefits Analysis • Master Facilities Plan Revision • Zheng Staff Resurvey 	

Comments

Strategic Plan Goals	Highly Effective (3) Meets Expectations (2) Growth Needed (1)
Provides leadership in developing long and short-term goals and keeps the Board updated on the implementation of library goals and objectives.	
Ensures that the library is on target for meeting the objectives and goals set forth in the Strategic Plan.	
Strategic Direction 1: Connect with Our Community	
Goal 1.1 Position ourselves as the community's center for information needs.	
Goal 1.2 Provide exposure to new experiences and ways of looking at the world.	
Strategic Direction 2: Build an Inclusive Culture	
Goal 2.1 Align staff roles and responsibilities and improve decision making processes across the organization.	
Goal 2.2 Foster a culture of shared growth and learning.	
Goal 2.3 Embed Equity, Diversity, and Inclusion in Operations	
Strategic Direction 3: Create Spaces to Belong	
Goal 3.1 Reimagine our spaces to increase flexibility and opportunities to explore and connect.	
Goal 3.2 Cultivate an inclusive and welcoming library environment.	
Goal 3.3 Improve access to facilities, programs, and materials to better serve all populations.	

Comments

Board Relationships	Highly Effective (3) Meets Expectations (2) Growth Needed (1)
Provides meaningful recommendations to help establish policies and offers direction to the Board when needed on issues requiring Board action.	
Prepares meeting packets that provide appropriate, adequate and timely information for the Board to make informed decisions	
Keep the Board apprised of present and future needs of the library pertaining to current trends, legislative issues, and internal workings of the library to aid in effective decision making.	
Provides relevant Board education opportunities on a regular basis.	
Works collaboratively with the Board to resolve any issues, as well as develop policies that will enhance the library's programs and services.	
Actively supports and executes the policies, procedures, and direction of the Board to community and staff.	
Provides program and service assessments to the Board on a regular basis.	

Comments

Financial Responsibility & Oversight	Highly Effective (3) Meets Expectations (2) Growth Needed (1)
Demonstrates fiscal responsibility in the administration of the budget and the optimal use of library funds to provide effective service.	
Ensures that library funds are spent responsibly, in compliance with legal requirements and fiscal policies.	
Assists with annual audit in accordance with legal requirements and current accounting standards.	
Provides the Board accurate and clear information regarding the financial status of the library through regular financial reports.	
Makes well-supported budgeting recommendations to the Board.	

Comments

<h2>Personnel Management & Leadership</h2>	Highly Effective (3) Meets Expectations (2) Growth Needed (1)
Oversees development and implementation of all personnel policies and procedures, incorporating best practices and ensuring statutory compliance.	
Leads by example and creates a positive workplace culture that demonstrates support, encouragement, and appreciation for staff.	
Ensures annual performance evaluations for employees are conducted each fiscal year.	
Analyzes staffing requirements and restructures to meet changing organizational and service needs.	
Promotes employee development and provides resources to help staff achieve their goals.	
Develops a succession planning strategy to ensure that the library is prepared for any workforce changes.	

Comments

<h2>Overall Quality of Library Services</h2>	Highly Effective (3) Meets Expectations (2) Growth Needed (1)
Oversee daily operations of Library: delegates authority and efficiently organizes the work of personnel.	
Understands the needs of the library's customers and community and seeks to fill those needs with the organization's programs and services.	
Promotes intellectual freedom via access to information and defense against censorship.	
Ensures development and maintenance of Library collections and resources meets patron needs.	
Committed to patron satisfaction and clearly articulates vision to staff about the importance of customer service and models best practices behavior.	

Comments

Community Relations	Highly Effective (3) Meets Expectations (2) Growth Needed (1)
Works to promote the visibility of the library by participation in community activities and networking opportunities.	
Establishes and maintains effective working relationships with governing officials and other community organizations keeping them informed of current trends and developments that impact libraries.	
Raises Northbrook Public Library visibility within the Northbrook community and elsewhere.	
Keeps abreast of local, state and national issues impacting libraries.	
Participates in local, state and national library associations.	

Comments

Facilities Management	Highly Effective (3) Meets Expectations (2) Growth Needed (1)
Interior and exterior of library is well maintained, accessible and inviting.	
Ample signage that is clear and visible and directs patrons to all areas of service.	
Maintains a Facility Plan which details needed repairs and creates a plan for upcoming facility needs and improvements	
Complies with all outside regulatory agency requirements to ensure a safe and healthy environment	
Incorporates necessary repairs and/or replacement of equipment into the budget.	
Provides adequate information on the need for new and/or updates needed for facility	

Comments

Goals for Next Fiscal Year

What would you like to see the Director accomplish in the next twelve months?