



Library Board Meeting Agenda

February 16, 2026 - 6:00 PM
New Berlin Library
15105 W Library Lane

Published: February 11, 2026

AGENDA

1. **PUBLIC COMMENT SESSION**
2. **CALL TO ORDER**
3. **ROLL CALL; DECLARATION OF QUORUM; PUBLIC NOTICE**
4. **COMMITTEE REPORTS**
 - A. Friends of New Berlin Library, Inc.
5. **CONSENT AGENDA**-----

Items under the Consent Agenda have passed unanimously by the Library Board. Items not passed by a unanimous vote will be removed from consent agenda and will be considered separately.

 - A. Approval of minutes
 - i. **Meeting Minutes:** Monday, January 19, 2026
 - B. **Next meeting date:** Monday, March 16, 2026 6:00 p.m.
 - C. Approval of Bills and Invoices
6. **END CONSENT AGENDA**-----
7. **ADMINISTRATIVE REPORTS**
 - A. President's Report
 - B. Director's Report
8. **UNFINISHED BUSINESS**
 - A. Meeting Space Policy Review
 - B. Library Circulation Policy Revision
 - C. Waukesha County Community Foundation - 2025 Fund Summary
9. **NEW BUSINESS**
 - A. Waukesha County Act 150 Recommendations for Minimum Standards and Distribution Formulas
 - B. 2025 Annual Report Review
10. **ANNOUNCEMENTS**
11. **ADJOURN**

Additional Information

- The agenda packet, including supplemental information related to agenda items, is available online at www.NewBerlinWI.gov. Once finalized by the governing body, approved meeting minutes will also be posted online.
- Agenda items may be taken out of order at the governing body's discretion.
- Members, and possibly a quorum, of other municipal governmental bodies may attend this meeting to gather information. However, no action will be taken by any governmental body other than the one referenced in this notice.
- Accommodations will be provided under the Americans with Disabilities Act (ADA) to meet the needs of individuals with disabilities. If you require assistance or appropriate aids and services, please contact the Office of the City Clerk at (262) 786-8610 with reasonable notice.

**New Berlin Public Library Board Meeting
January 19, 2026, at 6:00 P.M.
New Berlin Public Library
Marion Onesti Board Room**

1. PUBLIC COMMENT SESSION

There were no public comments made at this meeting.

2. CALL MEETING TO ORDER

President Marek called the meeting to order at 6:00 P.M.

3. ROLL CALL; OF QUORUM: PUBLIC NOTICE

Present: Trustee Bock, Trustee Greenawalt (Excused at 7:02 PM), Trustee Garrigues, Treasurer Jung, Trustee Kroupa, President Marek, and Secretary Orzel

Excused: Vice-President Kawala and Trustee Uhen

Staff Present: Library Director Natalie Beacom

Guests Present: Melissa Baxter, Waukesha County Foundation (WCCF) President & CEO

President Marek confirmed that a quorum was present and that the meeting was properly posted in compliance with the open meetings law.

The items on the agenda were reorganized by unanimous consent as follows:

9. NEW BUSINESS

A. Waukesha County Community Foundation Investment Brief

Melissa Baxter, Waukesha County Foundation (WCCF) President & CEO, provided an overview of the history and services offered by the organization.

4. COMMITTEE REPORTS

A. Friends of New Berlin Library, Inc. (FOL)

The FOL sponsored a Mini-Pop-Up sale 10:00 AM to 2:00 PM on Saturday, January 17, 2026.

5. CONSENT AGENDA

Items under the Consent Agenda have passed unanimously by the Library Board. Items not passed by a unanimous vote will be removed from consent agenda and will be considered separately.

A. Approval of minutes: Monday, November 17, 2025

B. Next meeting date: Monday, February 16, 2026

C. Approval of Bills and Invoices

6. END CONSENT AGENDA

MOTION: Motion to approve the consent agenda.

VOTE: Motion by Greenwalt
Seconded by Garrigues
Motion approved 7-0

7. ADMINISTRATIVE REPORTS

A. President's Report
No Report

B. Director 2025 Annual Infographic Report

The Library's Director, Natalie Beacom, provided the Board with a year-end review of Library usage, programming participation and services. The statistics indicate growth in all areas from 3.9% in new cards issued to 44% in visits to the Makerstudio. The full report is included in agenda packet and available on the City of New Berlin's website.

8. UNFINISHED BUSINESS

A. Library Meeting Space Policy

MOTION: Motion to approve subject to review and minor edits by the City Attorney.

VOTE: Motion by Garrigues
Second by Kroupa
Motion approved 7-0

B. Library's 2026 Operating Budget

The 2026 Operating Budget as adjusted and approved by the Common Council was reviewed by the Board. It was noted that the reduction of \$3,000 in funding for library materials prohibits the Library from meeting minimum standards. If the Library fails to meet minimum standards, the City may no longer be exempt from the county library tax.

9. NEW BUSINESS (Continued)

A. Library Circulation Policy Revisions

MOTION: Motion to table.

VOTE: Motion by Jung
Second by Bock
Motion approved 7-0

ANNOUNCEMENTS

President Marek asked that time be allocated on the next agenda to brainstorm ways to generate positive awareness of the benefits provided by the New Berlin Public Library to community members of diverse age groups and backgrounds.

ADJOURN

MOTION: Motion to adjourn at 7:20 PM.

VOTE: Motion by Jung
Second by Kroupa
Motion approved 6-0.

Respectfully submitted,
Patti Orzel, Secretary

YEAR-TO-DATE BUDGET REPORT

FOR 2026 01									
ACCOUNTS FOR:	LIBRARY		ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
15810000	50010	SALARY-FULL TIME	553,596	0	553,596	41,966.33	.00	511,629.67	7.6%
15810000	50020	SALARY-PART TIME	494,766	0	494,766	35,363.60	.00	459,402.40	7.1%
15810000	51010	RETIREMENT	54,238	0	54,238	4,066.55	.00	50,171.45	7.5%
15810000	51020	FICA	78,688	0	78,688	5,843.37	.00	72,844.63	7.4%
15810000	51030	HEALTH INSURANCE	75,327	0	75,327	7,377.24	.00	67,949.76	9.8%
15810000	51060	LONG-TERM DISABI	81	0	81	.00	.00	81.00	.0%
15810000	51065	VISION/DENTAL IN	3,720	0	3,720	250.56	.00	3,469.44	6.7%
15810000	51070	LIFE INSURANCE	1,074	0	1,074	178.98	.00	895.02	16.7%
15810000	53010	ELECTRICITY	74,000	0	74,000	.00	.00	74,000.00	.0%
15810000	53020	WATER/SEWER	3,000	0	3,000	.00	.00	3,000.00	.0%
15810000	53040	TELEPHONE/CELL P	6,000	0	6,000	627.55	.00	5,372.45	10.5%
15810000	53050	HEATING FUEL	19,000	0	19,000	.00	.00	19,000.00	.0%
15810000	54010	R&M BLDGS & GROU	40,000	0	40,000	7,554.15	.00	32,445.85	18.9%
15810000	54030	MAINTENANCE CONT	50,000	0	50,000	788.14	.00	49,211.86	1.6%
15810000	54060	MARKETING	1,000	0	1,000	229.51	.00	770.49	23.0%
15810000	54080	LEASES EQUIPMENT	48,000	0	48,000	9,212.34	.00	38,787.66	19.2%
15810000	54110	SUPPLIES	27,000	0	27,000	338.70	.00	26,661.30	1.3%
15810000	54170	POSTAGE	700	0	700	.00	.00	700.00	.0%
15810000	54230	LIBRARY MATERIAL	219,480	0	219,480	4,505.22	.00	214,974.78	2.1%
15810000	54330	TRAINING EXPENSE	500	0	500	.00	.00	500.00	.0%
15810000	54521	TECHNOLOGY/SOFTW	39,000	0	39,000	.00	.00	39,000.00	.0%
15810000	55090	PROGRAMS-JUVENIL	1,200	0	1,200	.00	.00	1,200.00	.0%
15810000	55095	PROGRAMS-YOUNG A	1,800	0	1,800	.00	.00	1,800.00	.0%
15810000	55100	PROGRAMS-ADULT	1,200	0	1,200	60.84	.00	1,139.16	5.1%
TOTAL LIBRARY			1,793,370	0	1,793,370	118,363.08	.00	1,675,006.92	6.6%
TOTAL EXPENSES			1,793,370	0	1,793,370	118,363.08	.00	1,675,006.92	

YEAR-TO-DATE BUDGET REPORT

FOR 2026 01								
	ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED	
GRAND TOTAL	1,793,370	0	1,793,370	118,363.08	.00	1,675,006.92	6.6%	
** END OF REPORT - Generated by Thu Van Hintz **								

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/1 TO 2026/1											
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION			
15810000											LIBRARY
15810000 53040											TELEPHONE/CELL PHONE
302074 AT&T	262785481701	0	2026	1	INV P	145.68	012826-1	281854	PHONES-LIB 1/4/26		
302074 AT&T	5033522112	0	2026	1	INV P	481.87	012826-1	281855	PHONES-LIB 1/7/26		
						627.55					
						ACCOUNT TOTAL			627.55		
15810000 54010											R&M BLDGS & GROUNDS
003228 BATZNER PEST CONTR	90433534	0	2026	1	INV P	135.85	012826-1	281859	PESTCNTRL-LIB 1/6/2		
020808 MARTIN PETERSEN CO	S42068 -	0	2026	1	INV P	1,617.00	012826-1	281903	BOILER RPAIRS-LIB 1		
020808 MARTIN PETERSEN CO	SX25604	0	2026	1	INV P	5,300.00	012826-1	281903	BOILDER/RPAIRS-LIB		
						6,917.00					
215465 BATTERIES PLUS LLC	P88791665	0	2026	1	INV P	501.30	012826-1	281858	BATTERIES-LIB 1/12/		
						ACCOUNT TOTAL			7,554.15		
15810000 54030											MAINTENANCE CONTRACT
359157 OTIS ELEVATOR COMPAN	100402197684	0	2026	1	INV P	232.26	012826-1	281916	ELEVATOR/MAINT CONT		
						ACCOUNT TOTAL			232.26		
15810000 54060											MARKETING
015580 AMAZON CAPITAL SERVI	13QT-7FLG-H9RY	0	2026	1	INV P	39.98	012826-1	281851	PROMO SUPPLIES-LIB		
015580 AMAZON CAPITAL SERVI	14WT-F6J6-F9KM	0	2026	1	INV P	19.99	012826-1	281851	PROG SUPPLIES-LIB 1		
015580 AMAZON CAPITAL SERVI	1C3W-YD1P-13PJ	0	2026	1	INV P	145.55	012826-1	281851	PROMO SUPPLIES-LIB		
015580 AMAZON CAPITAL SERVI	1V9P-PKXM-HWK1	0	2026	1	INV P	23.99	012826-1	281851	PROMO SUPPLIES-LIB		
						229.51					
						ACCOUNT TOTAL			229.51		
15810000 54110											SUPPLIES
015580 AMAZON CAPITAL SERVI	14YF-YRCH-GQFW	0	2026	1	INV P	23.74	012826-1	281851	BROOM/DUSTPAN-LIB 1		
015580 AMAZON CAPITAL SERVI	176L-PWQQ-XDVR	0	2026	1	INV P	59.97	012826-1	281851	HEADPHONES(2)-LIB 1		
015580 AMAZON CAPITAL SERVI	1JKG-CQ3H-DCD1	0	2026	1	INV P	16.98	012826-1	281851	OFFICE SUPPLIES-LIB		
015580 AMAZON CAPITAL SERVI	1KYJ-D4L1-1VRX	0	2026	1	INV P	7.59	012826-1	281851	FLOOR PROTECTORS-LI		
015580 AMAZON CAPITAL SERVI	1PYK-DQRD-CXJH	0	2026	1	INV P	16.19	012826-1	281851	THANK YOU CARDS-LI		
015580 AMAZON CAPITAL SERVI	1QL6-9YYQ-6CLG	0	2026	1	INV P	25.98	012826-1	281851	BROOM/DUSTPAN-LIB 1		
015580 AMAZON CAPITAL SERVI	1T6D-H7XM-CTLT	0	2026	1	INV P	35.59	012826-1	281851	FREESTANDING COAT R		
015580 AMAZON CAPITAL SERVI	1TCT-HG1X-CMKP	0	2026	1	INV P	6.19	012826-1	281851	EXACTO KNIFE-LIB 1/		
015580 AMAZON CAPITAL SERVI	1WCJ-P9N9-D9VM	0	2026	1	INV P	11.99	012826-1	281851	BATTERIES-LIB 1/7/2		
015580 AMAZON CAPITAL SERVI	1WKR-CX1Y-FWGP	0	2026	1	INV P	118.98	012826-1	281851	BOOKSHELF-LIB 1/13/		
015580 AMAZON CAPITAL SERVI	1YW4-GPGP-FNX7	0	2026	1	INV P	15.50	012826-1	281851	OFFICE SUPPLIES-LIB		
						338.70					
						ACCOUNT TOTAL			338.70		

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/1 TO 2026/1		ACCOUNT/VENDOR		INVOICE	PO	YEAR/PR	TYP S	PAYABLES	CHECK	DESCRIPTION	
15810000	54230									LIBRARY MATERIALS	
001613	GALE CENGAGE LEARNIN	999101859342	0	2026	1	INV P	260.16	012826-1	281888	VARIOUS TITLES-LIB	
001613	GALE CENGAGE LEARNIN	999101866468	0	2026	1	INV P	87.72	012826-1	281888	VARIOUS TITLES-LIB	
001613	GALE CENGAGE LEARNIN	999101889179	0	2026	1	INV P	27.74	012826-1	281888	VARIOUS TITLES-LIB	
001613	GALE CENGAGE LEARNIN	999101897332	0	2026	1	INV P	143.95	012826-1	281888	VARIOUS TITLES-LIB	
001613	GALE CENGAGE LEARNIN	999101915563	0	2026	1	INV P	53.98	012826-1	281888	VARIOUS TITLES-LIB	
001613	GALE CENGAGE LEARNIN	999101915565	0	2026	1	INV P	52.48	012826-1	281888	VARIOUS TITLES-LIB	
001613	GALE CENGAGE LEARNIN	999101933111	0	2026	1	INV P	78.72	012826-1	281888	VARIOUS TITLES-LIB	
001613	GALE CENGAGE LEARNIN	999101938980	0	2026	1	INV P	53.23	012826-1	281888	VARIOUS TITLES-LIB	
							757.98				
015580	AMAZON CAPITAL SERVI	176L-PWQQ-XFTT	0	2026	1	INV P	15.95	012826-1	281851	VARIOUS TITLES-LIB	
015580	AMAZON CAPITAL SERVI	17V7-LD9C-DFMR	0	2026	1	INV P	37.41	012826-1	281851	VARIOUS TITLES-LIB	
015580	AMAZON CAPITAL SERVI	1LN7-RQJR-6CP9	0	2026	1	INV P	136.68	012826-1	281851	VARIOUS TITLES-LIB	
015580	AMAZON CAPITAL SERVI	1LN7-RQJR-NPDL	0	2026	1	INV P	40.87	012826-1	281851	VARIOUS LIB MATERIA	
015580	AMAZON CAPITAL SERVI	1VRT-1THK-GRFL	0	2026	1	INV P	164.90	012826-1	281851	VARIOUS TITLES-LIB	
							395.81				
020890	VALUE LINE PUBLISH	DN26-61678 #61678	0	2026	1	INV P	2,360.00	012826-1	281937	2026 SUBSCRIP RENEW	
350982	T-MOBILE	970673785 JAN2026	0	2026	1	INV P	613.22	012826-1	281934	INTERNET/HOTSPOTS-L	
361291	MIDWEST TAPE	508278801	0	2026	1	INV P	126.21	012826-1	281910	VARIOUS TITLES-LIB	
							ACCOUNT TOTAL			4,253.22	
15810000	55100									PROGRAMS-ADULT	
015580	AMAZON CAPITAL SERVI	1WXK-FL6F-F9FH	0	2026	1	INV P	60.84	012826-1	281851	ADLT PROG SUPPLIES-	
							ACCOUNT TOTAL			60.84	
							ORG 15810000 TOTAL			13,296.23	
FUND 0010 GENERAL FUND							TOTAL:				13,296.23

** END OF REPORT - Generated by Thu Van Hintz **

YEAR-TO-DATE BUDGET REPORT

FOR 2025 13									
ACCOUNTS FOR:	LIBRARY		ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
15810000	50010	SALARY-FULL TIME	515,954	0	515,954	539,326.21	.00	-23,372.21	104.5%
15810000	50020	SALARY-PART TIME	451,464	0	451,464	465,453.43	.00	-13,989.43	103.1%
15810000	51010	RETIREMENT	48,777	0	48,777	52,790.79	.00	-4,013.79	108.2%
15810000	51020	FICA	75,808	0	75,808	76,030.94	.00	-222.94	100.3%
15810000	51030	HEALTH INSURANCE	123,338	0	123,338	86,766.01	.00	36,571.99	70.3%
15810000	51060	LONG-TERM DISABI	81	0	81	.00	.00	81.00	.0%
15810000	51065	VISION/DENTAL IN	1,161	0	1,161	2,944.32	.00	-1,783.32	253.6%
15810000	51070	LIFE INSURANCE	861	0	861	984.34	.00	-123.34	114.3%
15810000	53010	ELECTRICITY	70,000	0	70,000	74,818.94	.00	-4,818.94	106.9%
15810000	53020	WATER/SEWER	3,876	0	3,876	3,008.25	.00	867.75	77.6%
15810000	53040	TELEPHONE/CELL P	3,756	0	3,756	8,020.53	.00	-4,264.53	213.5%
15810000	53050	HEATING FUEL	19,500	0	19,500	15,859.94	.00	3,640.06	81.3%
15810000	54010	R&M BLDGS & GROU	40,000	0	40,000	64,617.49	.00	-24,617.49	161.5%
15810000	54030	MAINTENANCE CONT	60,000	0	60,000	53,698.22	.00	6,301.78	89.5%
15810000	54040	R&M EQUIPMENT	0	0	0	1,174.52	.00	-1,174.52	100.0%
15810000	54060	MARKETING	1,000	0	1,000	1,138.49	.00	-138.49	113.8%
15810000	54080	LEASES EQUIPMENT	48,000	0	48,000	43,269.51	.00	4,730.49	90.1%
15810000	54110	SUPPLIES	27,000	0	27,000	27,870.96	.00	-870.96	103.2%
15810000	54170	POSTAGE	900	0	900	900.00	.00	.00	100.0%
15810000	54180	HOUSEKEEPING SUP	0	0	0	1,391.48	.00	-1,391.48	100.0%
15810000	54230	LIBRARY MATERIAL	220,700	0	220,700	233,577.95	.00	-12,877.95	105.8%
15810000	54330	TRAINING EXPENSE	500	0	500	360.00	.00	140.00	72.0%
15810000	54521	TECHNOLOGY/SOFTW	38,000	0	38,000	38,859.13	.00	-859.13	102.3%
15810000	55090	PROGRAMS-JUVENIL	1,200	0	1,200	1,187.88	.00	12.12	99.0%
15810000	55095	PROGRAMS-YOUNG A	1,800	0	1,800	1,694.64	.00	105.36	94.1%
15810000	55100	PROGRAMS-ADULT	1,200	0	1,200	1,406.82	.00	-206.82	117.2%
TOTAL LIBRARY			1,754,876	0	1,754,876	1,797,150.79	.00	-42,274.79	102.4%
TOTAL EXPENSES			1,754,876	0	1,754,876	1,797,150.79	.00	-42,274.79	

YEAR-TO-DATE BUDGET REPORT

FOR 2025 13								
	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED	
GRAND TOTAL	1,754,876	0	1,754,876	1,797,150.79	.00	-42,274.79	102.4%	
** END OF REPORT - Generated by Thu Van Hintz **								

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/13 TO 2025/13									
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP S	PAYABLES	CHECK	DESCRIPTION		
15810000									
15810000 54010									
020808 MARTIN PETERSEN CO	S42068	0	2025 13	INV P	3,583.48 012826	281812	RPAIRS/MAINT-LIB 1/		
					ACCOUNT TOTAL			3,583.48	
15810000 54230									
361291 MIDWEST TAPE	508193265	0	2025 13	INV P	52.47 012826	281813	VARIOUS TITLES-LIB		
361291 MIDWEST TAPE	508244916	0	2025 13	INV P	197.93 012826	281813	VARIOUS TITLES-LIB		
					250.40				
					ACCOUNT TOTAL			250.40	
					ORG 15810000 TOTAL			3,833.88	
FUND 0010 GENERAL FUND					TOTAL:			3,833.88	

** END OF REPORT - Generated by Thu Van Hintz **

YEAR-TO-DATE BUDGET REPORT

FOR 2025 13

ACCOUNTS FOR:	ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
581 LIBRARY							
22810000 48040 DONATIONS	0	0	0	-84,283.21	.00	84,283.21	100.0%
22810000 54110 SUPPLIES	0	0	0	2,348.95	.00	-2,348.95	100.0%*
22810000 54110 FOL SUPPLIES	0	0	0	16,642.54	.00	-16,642.54	100.0%*
22810000 54230 BOOKS/PAMPHLETS	0	0	0	335.16	.00	-335.16	100.0%*
22810000 54230 FOL BOOKS/PAMPHLE	0	0	0	281.56	.00	-281.56	100.0%*
22810000 55090 PROGRAMS-JUVENIL	0	0	0	3,858.54	.00	-3,858.54	100.0%*
22810000 55090 FOL PROGRAMS-JUVE	0	0	0	2,531.95	.00	-2,531.95	100.0%*
22810000 55095 FOL PROGRAMS-YOUN	0	0	0	3,068.43	.00	-3,068.43	100.0%*
22810000 55100 PROGRAMS-ADULT	0	0	0	290.61	.00	-290.61	100.0%*
22810000 55100 FOL PROGRAMS-ADUL	0	0	0	15,435.54	.00	-15,435.54	100.0%*
TOTAL LIBRARY	0	0	0	-39,489.93	.00	39,489.93	100.0%
TOTAL REVENUES	0	0	0	-84,283.21	.00	84,283.21	
TOTAL EXPENSES	0	0	0	44,793.28	.00	-44,793.28	

YEAR-TO-DATE BUDGET REPORT

FOR 2025 13

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
GRAND TOTAL	0	0	0	-39,489.93	.00	39,489.93	100.0%

** END OF REPORT - Generated by Thu Van Hintz **

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/1 TO 2026/1										
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION		
22810000								LIBRARY DONATION		
22810000 55100 FOL								PROGRAMS-ADULT		
014829 KUTZ TERRY R	1/17/26	PROG INTERPR 0	2026 1	INV	P	125.00	012826-1	281901 FOL#2435/PROG INTER		
335185 FRITZ-KLAUS KARRI	2026	ART LECTURE SER 0	2026 1	INV	P	1,625.00	012826-1	281887 FOL#2539/2026 ART L		
						ACCOUNT TOTAL		1,750.00		
						ORG 22810000 TOTAL		1,750.00		
FUND 0200 LIBRARY DONATION FUND						TOTAL:		1,750.00		

** END OF REPORT - Generated by Thu Van Hintz **

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/2 TO 2026/2											
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION			
15810000								LIBRARY			
15810000 54010								R&M BLDGS & GROUNDS			
015580	AMAZON CAPITAL SERVI 13FK-JMLP-4DJ6	26513057	2026 2	INV	P	49.98	021126	282016	SUPPLIES-F&G/LIB		
311839	HOME DEPOT CREDIT SE 6023971	26513036	2026 2	INV	P	61.04	021126	282052	MAINT/RPAIRS-LIB 1/		
311839	HOME DEPOT CREDIT SE 6332711	26513036	2026 2	INV	P	35.10	021126	282052	MAINT/RPAIRS-LIB 1/		
						96.14					
						ACCOUNT TOTAL			146.12		
15810000 54060								MARKETING			
015580	AMAZON CAPITAL SERVI 191T-HGYN-61TF	0	2026 2	INV	P	21.38	021126	282016	MARKETING/SUPPLIES-		
						ACCOUNT TOTAL			21.38		
15810000 54080								LEASES EQUIPMENT			
295906	PITNEY BOWES 3322004278	0	2026 2	INV	P	77.28	021126	282090	POSTAGE METER LEASE		
362301	GREAT AMERICA FINANC 41055886	0	2026 2	INV	P	380.86	021126	282045	COPIER LEASE/USAGE-		
362301	GREAT AMERICA FINANC 41156207	0	2026 2	INV	P	510.25	021126	282045	COPIER LEASE/USAGE-		
						891.11					
						ACCOUNT TOTAL			968.39		
15810000 54110								SUPPLIES			
015580	AMAZON CAPITAL SERVI 16PG-V61J-DGCG	0	2026 2	INV	P	231.23	021126	282016	VARIOUS TITLES/SUPP		
015580	AMAZON CAPITAL SERVI 1HT1-D1CH-9CW1	0	2026 2	INV	P	14.24	021126	282016	SUPPLIES-LIB 1/21/2		
						245.47					
						ACCOUNT TOTAL			245.47		
15810000 54180								HOUSEKEEPING SUPPLY			
026400	ITU ABSORB TECH 8670917	0	2026 2	INV	P	94.48	021126	282061	MATS-LIB 1/26/26		
						ACCOUNT TOTAL			94.48		
15810000 54230								LIBRARY MATERIALS			
001613	GALE CENGAGE LEARNIN 999102018937	0	2026 2	INV	P	28.49	021126	282041	VARIOUS TITLES-LIB		
001613	GALE CENGAGE LEARNIN 999102075674	0	2026 2	INV	P	52.48	021126	282041	VARIOUS TITLES-LIB		
001613	GALE CENGAGE LEARNIN 999102094470	0	2026 2	INV	P	27.74	021126	282041	VARIOUS TITLES-LIB		
001613	GALE CENGAGE LEARNIN 999102146211	0	2026 2	INV	P	141.74	021126	282041	VARIOUS TITLES-LIB		
						250.45					
015580	AMAZON CAPITAL SERVI 11JL-4RWD-1DHH	0	2026 2	INV	P	19.99	021126	282016	VARIOUS TITLES-LIB		
015580	AMAZON CAPITAL SERVI 13NN-6QLR-6XDJ	0	2026 2	INV	P	7.19	021126	282016	VARIOUS TITLES-LIB		
015580	AMAZON CAPITAL SERVI 14DT-PVK9-R9CV	0	2026 2	INV	P	32.02	021126	282016	VARIOUS TITLES-LIB		
015580	AMAZON CAPITAL SERVI 14MF-7XTD-JMT4	0	2026 2	INV	P	53.02	021126	282016	VARIOUS TITLES-LIB		
015580	AMAZON CAPITAL SERVI 14TJ-HF6Y-FWNN	0	2026 2	INV	P	72.56	021126	282016	VARIOUS TITLES-LIB		

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/2 TO 2026/2													
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION					
015580	AMAZON CAPITAL SERVI 16PG-V61J-DGCG	0	2026	2	INV P	60.71	021126	282016	VARIOUS	TITLES/SUPP			
015580	AMAZON CAPITAL SERVI 16PG-V61J-LQTG	0	2026	2	INV P	87.01	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 16PX-YXD3-YJ4K	0	2026	2	INV P	34.99	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 16YR-NJ49-R34D	0	2026	2	INV P	616.40	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 177N-GMPG-DHV4	0	2026	2	INV P	12.99	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 17PD-LCHF-L1N9	0	2026	2	INV P	186.05	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 17TK-LK47-W7MM	0	2026	2	INV P	374.94	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 19M7-VGYL-HTJD	0	2026	2	INV P	201.98	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1C1Y-7YFX-LVJ3	0	2026	2	INV P	225.86	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1G9L-JWYN-GFGJ	0	2026	2	INV P	35.28	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1GF4-TMPV-3TKL	0	2026	2	INV P	344.37	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1GT1-D6HG-DCWJ	0	2026	2	INV P	545.19	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1JCK-YD7T-D6MC	0	2026	2	INV P	18.12	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1K3V-M97D-16TT	0	2026	2	INV P	13.73	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1L77-HTXG-449H	0	2026	2	INV P	595.33	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1M3M-4CDR-6R7P	0	2026	2	INV P	308.95	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1MLW-7C3G-99ML	0	2026	2	INV P	59.31	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1P4D-VRR7-3QJ1	0	2026	2	INV P	694.54	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1R41-DTCV-DL7X	0	2026	2	INV P	22.34	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1RLR-HXLD-TMCK	0	2026	2	INV P	19.13	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1T9Y-H474-XMJ6	0	2026	2	INV P	210.44	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1V6F-Y6PD-3T4T	0	2026	2	INV P	437.31	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1VPT-XXL3-MNDN	0	2026	2	INV P	35.40	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1WTM-9RCF-7P3V	0	2026	2	INV P	382.44	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1XKC-Y3GG-W3T9	0	2026	2	INV P	295.66	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1XTT-1W7J-CXHR	0	2026	2	INV P	118.93	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1Y4L-H97W-4V6V	0	2026	2	INV P	12.99	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1Y77-M41T-944T	0	2026	2	INV P	225.08	021126	282016	VARIOUS	TITLES-LIB			
015580	AMAZON CAPITAL SERVI 1YYG-XGN4-LK76	0	2026	2	INV P	193.69	021126	282016	VARIOUS	TITLES-LIB			
						6,553.94							
292346	HARRISON KRISTA	1/2926	0	2026	2	INV P	33.98	021126	282047	VARIOUS	TITLES-LIB		
361291	MIDWEST TAPE	508330190	0	2026	2	INV P	627.78	021126	282076	VARIOUS	TITLES-LIB		
361291	MIDWEST TAPE	508330191	0	2026	2	INV P	39.99	021126	282076	VARIOUS	TITLES-LIB		
361291	MIDWEST TAPE	508349482	0	2026	2	INV P	101.23	021126	282076	VARIOUS	TITLES-LIB		
						769.00							
					ACCOUNT TOTAL	7,607.37							
					ORG 15810000 TOTAL	9,083.21							
					FUND 0010 GENERAL FUND	TOTAL:	9,083.21						

** END OF REPORT - Generated by Thu Van Hintz **

YEAR-TO-DATE BUDGET REPORT

FOR 2026 02									
ACCOUNTS FOR:	LIBRARY		ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
15810000	50010	SALARY-FULL TIME	553,596	0	553,596	63,160.85	.00	490,435.15	11.4%
15810000	50020	SALARY-PART TIME	494,766	0	494,766	52,482.20	.00	442,283.80	10.6%
15810000	51010	RETIREMENT	54,238	0	54,238	6,137.55	.00	48,100.45	11.3%
15810000	51020	FICA	78,688	0	78,688	8,770.53	.00	69,917.47	11.1%
15810000	51030	HEALTH INSURANCE	75,327	0	75,327	7,377.24	.00	67,949.76	9.8%
15810000	51060	LONG-TERM DISABI	81	0	81	.00	.00	81.00	.0%
15810000	51065	VISION/DENTAL IN	3,720	0	3,720	250.56	.00	3,469.44	6.7%
15810000	51070	LIFE INSURANCE	1,074	0	1,074	178.98	.00	895.02	16.7%
15810000	53010	ELECTRICITY	74,000	0	74,000	.00	.00	74,000.00	.0%
15810000	53020	WATER/SEWER	3,000	0	3,000	.00	.00	3,000.00	.0%
15810000	53040	TELEPHONE/CELL P	6,000	0	6,000	627.55	.00	5,372.45	10.5%
15810000	53050	HEATING FUEL	19,000	0	19,000	.00	.00	19,000.00	.0%
15810000	54010	R&M BLDGS & GROU	40,000	0	40,000	7,700.27	.00	32,299.73	19.3%
15810000	54030	MAINTENANCE CONT	50,000	0	50,000	788.14	.00	49,211.86	1.6%
15810000	54060	MARKETING	1,000	0	1,000	250.89	.00	749.11	25.1%
15810000	54080	LEASES EQUIPMENT	48,000	0	48,000	10,180.73	.00	37,819.27	21.2%
15810000	54110	SUPPLIES	27,000	0	27,000	670.50	.00	26,329.50	2.5%
15810000	54170	POSTAGE	700	0	700	.00	.00	700.00	.0%
15810000	54180	HOUSEKEEPING SUP	0	0	0	94.48	.00	-94.48	100.0%
15810000	54230	LIBRARY MATERIAL	219,480	0	219,480	12,220.46	.00	207,259.54	5.6%
15810000	54330	TRAINING EXPENSE	500	0	500	.00	.00	500.00	.0%
15810000	54521	TECHNOLOGY/SOFTW	39,000	0	39,000	.00	.00	39,000.00	.0%
15810000	55090	PROGRAMS-JUVENIL	1,200	0	1,200	.00	.00	1,200.00	.0%
15810000	55095	PROGRAMS-YOUNG A	1,800	0	1,800	.00	.00	1,800.00	.0%
15810000	55100	PROGRAMS-ADULT	1,200	0	1,200	60.84	.00	1,139.16	5.1%
TOTAL LIBRARY			1,793,370	0	1,793,370	170,951.77	.00	1,622,418.23	9.5%
TOTAL EXPENSES			1,793,370	0	1,793,370	170,951.77	.00	1,622,418.23	

YEAR-TO-DATE BUDGET REPORT

FOR 2026 02

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
GRAND TOTAL	1,793,370	0	1,793,370	170,951.77	.00	1,622,418.23	9.5%

** END OF REPORT - Generated by Thu Van Hintz **

CASH ACCOUNT: 10 111000 CASH
 CHECK NO CHK DATE TYPE VENDOR NAME

VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
10150	02/08/2026 EFT 11840 US BANK - CREDIT CAR				
	DOCUMENT	INVOICE DTL DESC			
253132	12/17/25BROOKHOLLOW	02/08/2026	25501071	020826E	497.65
	Invoice: 12/17/25BROOKHOLLOW			BROOKHOLLOW/BIRTHDAY CARDS-MAYOR 12/17/25	
253133	12/26/25GANNETT-MAYR	02/08/2026		020826E	14.99
	Invoice: 12/26/25GANNETT-MAYR			GANNETT/MILW JRNL DIGITAL SUBSCRIP-MAYOR 12/26/25	
253136	12/31/25ULINE-DCD	02/08/2026	25529168	020826E	1,560.88
	Invoice: 12/31/25ULINE-DCD			ULINE/DESK-DCD 12/31/25	
253137	12/31/25APPLE.COM-	02/08/2026	25529027	020826E	.99
	Invoice: 12/31/25APPLE.COM-			APPLE/ICLOUD STORAGE SUBSCRIP-DCD 12/31/25	
253144	12/16/25 4IMPRINT-	02/08/2026	25592492	020826E	818.69
	Invoice: 12/16/25 4IMPRINT-			4IMPRINT/BIRTHDAY PARTY SHIRTS-REC 12/16/25	
253145	12/17/25AM RED CROSS	02/08/2026	25592466	020826E	198.00
	Invoice: 12/17/25AM RED CROSS			AM REDCROSS/BABYSITTERS TRAINING-REC 12/17/25	
253146	12/17/25GRAPE ESCAPE	02/08/2026	25592472	020826E	210.00
	Invoice: 12/17/25GRAPE ESCAPE			GRAPE ESCAPE/PAINTING CLASSES-REC 12/17/25	
253147	12/17/25CONSTANTCONT	02/08/2026	25592490	020826E	225.75
	Invoice: 12/17/25CONSTANTCONT			CONSTANT CONTACT/NEWSLETTER -REC 12-17-25	
253148	12/17/25MARCUSTHEATR	02/08/2026	25592467	020826E	1,330.00
	Invoice: 12/17/25MARCUSTHEATR			MARCUS THEATRES/DAYCAMP-REC 12/17/25	
253149	12/17/25WI PARKNREC	02/08/2026		020826E	75.00
	Invoice: 12/17/25WI PARKNREC			WPRA/JOB POSTING ANNOUNCEMENT-REC 12/17/25	
253150	12/18/25AMZN1-REC	02/08/2026	25592489	020826E	61.09
	Invoice: 12/18/25AMZN1-REC			AMZN/CAR SNOW BRUSHES JUMPER CABLES-REC 12/18/25	
253151	12/18/25WALMART-REC	02/08/2026	25592473	020826E	17.14
	Invoice: 12/18/25WALMART-REC			WALMART/SANTA LETTERS EVENT-REC 12/18/25	
253153	12/19/25AMZN1-REC	02/08/2026	25592489	020826E	41.99
	Invoice: 12/19/25AMZN1-REC			AMZN/COMM CNTER CLOTHES RACK-REC 12/19/25	

CASH ACCOUNT: 10 111000 CASH
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VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
DOCUMENT	INVOICE DTL DESC				
253154	12/19/25AMZN2-REC	02/08/2026	25592489	020826E	40.40
Invoice: 12/19/25AMZN2-REC	AMZN/COMM CTR OFFICE SUPPLIES-REC 12/19/25				
253155	12/19/5AMZN3-REC	02/08/2026	25592489	020826E	34.56
Invoice: 12/19/5AMZN3-REC	AMZN/SUGGESTION BOX-REC 12/19/25				
253156	12/19/25WALMART-REC	02/08/2026	25592491	020826E	131.83
Invoice: 12/19/25WALMART-REC	WALMART/DAYCAMP SUPPLIES-REC 12/19/25				
253157	12/19/25PICNSAV1-REC	02/08/2026	25592477	020826E	22.00
Invoice: 12/19/25PICNSAV1-REC	PICNSAV/PARENT'S NITE OUT/PIZZAS-REC 12/19/25				
253158	12/19/25PICNSAV2-REC	02/08/2026	25592485	020826E	40.16
Invoice: 12/19/25PICNSAV2-REC	PICNSAV/ARC CONCESSION STAND-REC 12/19/25				
253159	12/21/25AMZN1-REC	02/08/2026	25592489	020826E	38.67
Invoice: 12/21/25AMZN1-REC	AMZN/40KEY STORAGE LOCK BOX-REC 12/21/25				
253161	12/21/25AMZN2-REC	02/08/2026	25592489	020826E	79.52
Invoice: 12/21/25AMZN2-REC	AMZN/GOOD LUCK PLASTIC TABLE CLOTHS-REC 12/21/25				
253207	12/16/25COSTCO-HR	02/08/2026	25504141	020826E	36.96
Invoice: 12/16/25COSTCO-HR	COSTCO/RECRUITING SUPPLIES-HR 12/16/25				
253208	12/17/25PANERA-HR	02/08/2026	25504141	020826E	50.42
Invoice: 12/17/25PANERA-HR	PANERA/RECRUITING BREAKFAST-HR 12/17/25				
253211	12/12/25ROSATI-UT	02/08/2026	25800170	020826E	831.18
Invoice: 12/12/25ROSATI-UT	ROSATIS/DPW/UT LUNCH-UT 12/12/2025				
253212	12/15/25WESTERNSAFTY	02/08/2026	25800171	020826E	5,246.30
Invoice: 12/15/25WESTERNSAFTY	WESTERN SAFETY /CONFINED SPACE TRIPOD KIT-UT12/15				
253213	12/18/25ROSATI-UT	02/08/2026	25800178	020826E	113.00
Invoice: 12/18/25ROSATI-UT	ROSATIS/LUNCH -UT 12/18/2025				
253214	12/19/25NORTHRN TOOL	02/08/2026	25900355	020826E	614.98
Invoice: 12/19/25NORTHRN TOOL	NORTHERN TOOL /MILW TOOLS ITEMS-UT 12/19/25				

CASH ACCOUNT: 10 111000 CASH
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VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
DOCUMENT	INVOICE DTL DESC				
253215	12/29/25ZOROTOOLS-UT	02/08/2026	25900364	020826E	285.01
Invoice: 12/29/25ZOROTOOLS-UT	ZOROTOOLS/SHOP SUPPLIES-UT	12/29/25			
253216	12/30/25ZOROTOOLS-UT	02/08/2026	25900375	020826E	19.16
Invoice: 12/30/25ZOROTOOLS-UT	ZOROTOOLS/GRINDER WRENCH-UT	12/30/25			
253217	1/6/26ZOROTOOLS-UT	02/08/2026	25900368	020826E	17.24
Invoice: 1/6/26ZOROTOOLS-UT	ZOROTOOLS/ABRASIVE SAND CLOTH-UT	1/6/26			
253219	12/16/25PICNSAV-DPW	02/08/2026	25563274	020826E	118.88
Invoice: 12/16/25PICNSAV-DPW	PICNSAV/TRAINING-DPW	12/16/25			
253220	12/16/25COSTCO-DPW	02/08/2026	25563274	020826E	127.42
Invoice: 12/16/25COSTCO-DPW	COSTCO/TRAINING-DPW	12/16/25			
253221	12/15/25PICNSAV-PARK	02/08/2026	25513700	020826E	293.48
Invoice: 12/15/25PICNSAV-PARK	PICNSAV/COREY LUNCHEON-PARKS	12/15/25			
253222	12/19/25TREESTUFF	02/08/2026	25591313	020826E	1,594.86
Invoice: 12/19/25TREESTUFF	TREESTUFF,/EQPMT-PARKS	12/19/25			
253223	12/12/25POSTAL-STR	02/08/2026	25563287	020826E	2,397.00
Invoice: 12/12/25POSTAL-STR	POSTAL PRODUCTS/MAILBOXES(100)-STREETS	12/12/25			
253224	12/18/25PICNSAV-STR	02/08/2026	25563287	020826E	43.98
Invoice: 12/18/25PICNSAV-STR	PICNSAV/TRAINING-STREETS	12/18/25			
253227	10/27/25ZOROTOOLS-CR	02/08/2026		020826E	-1.57
Invoice: 10/27/25ZOROTOOLS-CR	ZOROTOOLS/SALES TAX REVERSAL CRDIT-F&G	10/27/25			
253228	12/16/25NORTHRNTOOL-	02/08/2026	25513754	020826E	208.76
Invoice: 12/16/25NORTHRNTOOL-	NORTHERN TOOL/TOOLS &\$108.85 SHIPPING-F&G	12/16/25			
253229	12/18/25SUPPLYHOUSE	02/08/2026	25513721	020826E	249.05
Invoice: 12/18/25SUPPLYHOUSE	SUPPLYHOUSE/EQPMT PARTS-F&G	12/18/25			
253230	12/18/25LIGHTBULBS.	02/08/2026	25513717	020826E	9,836.00
Invoice: 12/18/25LIGHTBULBS.	LIGHTBUBS.COM/SUPPLIES \$100 CONVENIENCE FEE-F&G				

CASH ACCOUNT: 10 111000 CASH
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VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
DOCUMENT	INVOICE DTL	DESC			
253231	12/18/25NORTHERNTOOL	02/08/2026	25513754	020826E	334.76
Invoice: 12/18/25NORTHERNTOOL	NORTHERN TOOL/CIRCUIT BREAKER-F&G 12/18/25				
253232	12/19/25BEARINGS-F&G	02/08/2026	25513712	020826E	42.78
Invoice: 12/19/25BEARINGS-F&G	/BEARINGS SOUTH/PARTS-F&G 12/19/25				
253233	12/19/25NORTHERNTOOL	02/08/2026	25513755	020826E	1,227.26
Invoice: 12/19/25NORTHERNTOOL	NORTHERN TOOL//CABINETS(3) \$193.85 SHIPPING-F&G				
253234	12/22/25PEAKTRADING	02/08/2026	25513721	020826E	376.00
Invoice: 12/22/25PEAKTRADING	PEAK TRADING/RIGGING WAREHOUSE/SUPPLIES-F&G 12/22				
253235	12/26/25AMZN-F&G	02/08/2026	25513753	020826E	268.96
Invoice: 12/26/25AMZN-F&G	AMZN/PROJECTOR SCREEN/MOP HANDLES-F&G 12/26				
253236	12/30/25AMZN-F&G	02/08/2026	25513753	020826E	62.95
Invoice: 12/30/25AMZN-F&G	AMZN/WINDSHIELD DE ICER SPRAYS-F&G 12/30				
253237	12/30/25AMZN2-F&G	02/08/2026	25513753	020826E	494.61
Invoice: 12/30/25AMZN2-F&G	AMZN/URINAL AUGERS-F&G 12/30/25				
253238	12/31/25NORTHERNTOOL	02/08/2026	25513754	020826E	615.50
Invoice: 12/31/25NORTHERNTOOL	NORTHERN TOOL/TOILET AUGERS-F&G 12/31/25				
253239	1/3/26AMZN-F&G	02/08/2026	25513753	020826E	157.49
Invoice: 1/3/26AMZN-F&G	AMZN/MOTORIZD PROJECTR SCREEN-F&G 1/3/26				
253240	1/4/26AMZN-F&G	02/08/2026	25513753	020826E	237.63
Invoice: 1/4/26AMZN-F&G	AMZN/DUSTMOPS/HAIR DRAIN CLOG RMOVER-F&G 1/4/26				
253241	12/22/25WALMART/MUSK	02/08/2026	25501072	020826E	29.58
Invoice: 12/22/25WALMART/MUSK	WALMART/MUSKEGO/OFFICE CANDY-MAYOR 12/22/25				
253242	12/29/25BRUNCH BERRY	02/08/2026	25501073	020826E	87.54
Invoice: 12/29/25BRUNCH BERRY	BRUNCHBERRY/BREAKFAST MEETING-MAYOR 12/29/25				
253245	12/15/25TARGET-FD	02/08/2026	25523438	020826E	104.99
Invoice: 12/15/25TARGET-FD	TARGET/VACUUM/FS#10-FD 12/15/25				

CASH ACCOUNT: 10 111000 CASH
 CHECK NO CHK DATE TYPE VENDOR NAME

VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
DOCUMENT	INVOICE DTL	DESC			
253246	12/17&21AMZN-FD	02/08/2026	25523427	020826E	296.58
Invoice: 12/17&21AMZN-FD				AMZN/LAUNDRY DETERGENT/LABEL MAKER-FD 12/17/25	
253247	12/18/25AMZN1-FD	02/08/2026	25523442	020826E	112.76
Invoice: 12/18/25AMZN1-FD				AMZN/EMS SUPPLIES-FD 12/18/25	
253248	12/18/25AMZN2-FD	02/08/2026	25523433	020826E	677.14
Invoice: 12/18/25AMZN2-FD				AMZN/EMS SUPPLIES-FD 12/18/25	
253249	12/19/25SAMSCLUB-FD	02/08/2026	25523447	020826E	29.15
Invoice: 12/19/25SAMSCLUB-FD				SAMSCLUB/SWEETS RETIREMENT RECEPTION-FD 12/19	
253250	12/20/25SAMSCLUB-FD	02/08/2026	25523423	020826E	21.87
Invoice: 12/20/25SAMSCLUB-FD				SAMSCLUB/SHEET CAKE RETIREMENT SHANNON-FD 12/20	
253251	12/30/25AM HEART CPR	02/08/2026	25523446	020826E	7,093.00
Invoice: 12/30/25AM HEART CPR				AMERICAN HEART/EMS TRAINING-FD 12/30/25	
253254	12/15/25WI LAW -PD	02/08/2026	25521695	020826E	154.48
Invoice: 12/15/25WI LAW -PD				WI LAW ENFORCEMENT/WILEAG ASSESSMNT-PD 12/15	
253262	12/15/25AMZN1-LIB	02/08/2026		020826E	12.74
Invoice: 12/15/25AMZN1-LIB				AMZN/VARIOUS TITLES-LIB 12/15/25	
253263	12/16/25AMZN1-LIB	02/08/2026		020826E	12.34
Invoice: 12/16/25AMZN1-LIB				AMZN/VARIOUS TITLES-LIB 12/16/25	
253264	12/16/25AMZN2-LIB	02/08/2026		020826E	16.49
Invoice: 12/16/25AMZN2-LIB				AMZN/VARIOUS TITLES-LIB 12/16/25	
253265	12/16/25CANVA-LIB	02/08/2026		020826E	119.40
Invoice: 12/16/25CANVA-LIB				CANVA/SUBSCRIP-LIB 12/16/25	
253266	12/16/25SPOTIFY-LIB	02/08/2026		020826E	17.84
Invoice: 12/16/25SPOTIFY-LIB				FOL#2537/SPOTIFY/MUSIC APP SUBSCRIP-LIB 12/16/25	
253267	12/18/25AMZN-LIB	02/08/2026		020826E	17.02
Invoice: 12/18/25AMZN-LIB				AMZN/VARIOUS TITLES-LIB 12/18/25	

CASH ACCOUNT: 10 111000 CASH
 CHECK NO CHK DATE TYPE VENDOR NAME

VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
DOCUMENT	INVOICE DTL DESC				
253268	12/23/25ADOBE-LIB	02/08/2026		020826E	19.99
Invoice: 12/23/25ADOBE-LIB	ADOBE/LICENSING-LIB 12/23/25				
253269	12/29/25AMZN-LIB	02/08/2026		020826E	14.99
Invoice: 12/29/25AMZN-LIB	AMZN/VARIOUS TITLES-LIB 12/29/25				
253270	12/30/25AMZN1-LIB	02/08/2026		020826E	23.99
Invoice: 12/30/25AMZN1-LIB	AMZN/VARIOUS TITLES-LIB 12/30/25				
253271	12/30/25AMZN2-LIB	02/08/2026		020826E	12.34
Invoice: 12/30/25AMZN2-LIB	AMZN/VARIOUS TITLES-LIB 12/30/25				
253272	12/30/25AMZN3-LIB	02/08/2026		020826E	27.88
Invoice: 12/30/25AMZN3-LIB	AMZN/VARIOUS TITLES-LIB 12/30/25				
253273	12/30/25AMZN4-LIB	02/08/2026		020826E	14.29
Invoice: 12/30/25AMZN4-LIB	AMZN/VARIOUS TITLES-LIB 12/30/25				
253274	1/6/26MILW MUSEUM	02/08/2026		020826E	135.00
Invoice: 1/6/26MILW MUSEUM	FOL#2540/MILW MUSEUM/2025 READING CHALLENGE-LIB				
253275	1/6/26AMZN1-LIB	02/08/2026		020826E	12.99
Invoice: 1/6/26AMZN1-LIB	AMZN/VARIOUS TITLES-LIB 1/6/26				
253276	1/6/26AMZN2-LIB	02/08/2026		020826E	5.99
Invoice: 1/6/26AMZN2-LIB	AMZN/VARIOUS TITLES-LIB 1/6/26				
			CHECK	10150 TOTAL:	40,409.74
	NUMBER OF CHECKS	1	*** CASH ACCOUNT TOTAL ***		40,409.74
			COUNT	AMOUNT	
	TOTAL EFT'S		1	40,409.74	
			*** GRAND TOTAL ***		40,409.74

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|CITY OF NEW BERLIN
|A/P CASH DISBURSEMENTS JOURNAL
JOURNAL ENTRIES TO BE CREATED

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YEAR PER	JNL	SRC ACCOUNT	JNL DESC	REF 1	REF 2	REF 3	ACCOUNT DESC LINE DESC	T OB	DEBIT	CREDIT	
2025 13	23										
APP 10-200000		12/31/2025	020826E	10150			ACCOUNTS PAYABLE CLEARING AP CASH DISBURSEMENTS JOURNAL		26,037.03		
APP 10-111000		12/31/2025	020826E	10150			CASH AP CASH DISBURSEMENTS JOURNAL			40,409.74	
APP 80-200000		12/31/2025	020826E	10150			ACCOUNTS PAYABLE CLEARING AP CASH DISBURSEMENTS JOURNAL		3,553.86		
APP 90-200000		12/31/2025	020826E	10150			ACCOUNTS PAYABLE CLEARING AP CASH DISBURSEMENTS JOURNAL		3,573.01		
APP 223-200000		12/31/2025	020826E	10150			ACCOUNTS PAYABLE CLEARING AP CASH DISBURSEMENTS JOURNAL		7,093.00		
APP 200-200000		12/31/2025	020826E	10150			ACCOUNTS PAYABLE CLEARING AP CASH DISBURSEMENTS JOURNAL		152.84		
GENERAL LEDGER TOTAL								-----	40,409.74	-----	40,409.74
APP 10-150100		12/31/2025	020826E	10150			DUE TO/FROM		14,372.71		
APP 80-150100		12/31/2025	020826E	10150			DUE TO/FROM			3,553.86	
APP 90-150100		12/31/2025	020826E	10150			DUE TO/FROM			3,573.01	
APP 223-150100		12/31/2025	020826E	10150			DUE TO/FROM			7,093.00	
APP 200-150100		12/31/2025	020826E	10150			DUE TO/FROM			152.84	
SYSTEM GENERATED ENTRIES TOTAL								-----	14,372.71	-----	14,372.71
JOURNAL 2025/13/23 TOTAL								-----	54,782.45	-----	54,782.45

FUND	YEAR PER	JNL	EFF DATE	ACCOUNT DESCRIPTION	DEBIT	CREDIT
0010 GENERAL FUND	2025 13	23	12/31/2025	ACCOUNT DESCRIPTION		
10-111000				CASH		40,409.74
10-150100				DUE TO/FROM	14,372.71	
10-200000				ACOUNTS PAYABLE CLEARING	26,037.03	
				FUND TOTAL	40,409.74	40,409.74
0080 SEWER	2025 13	23	12/31/2025	ACCOUNT DESCRIPTION		
80-150100				DUE TO/FROM		3,553.86
80-200000				ACOUNTS PAYABLE CLEARING	3,553.86	
				FUND TOTAL	3,553.86	3,553.86
0090 WATER	2025 13	23	12/31/2025	ACCOUNT DESCRIPTION		
90-150100				DUE TO/FROM		3,573.01
90-200000				ACOUNTS PAYABLE CLEARING	3,573.01	
				FUND TOTAL	3,573.01	3,573.01
0200 LIBRARY DONATION FUND	2025 13	23	12/31/2025	ACCOUNT DESCRIPTION		
200-150100				DUE TO/FROM		152.84
200-200000				ACOUNTS PAYABLE CLEARING	152.84	
				FUND TOTAL	152.84	152.84
0223 STATE EMS FUND	2025 13	23	12/31/2025	ACCOUNT DESCRIPTION		
223-150100				DUE TO/FROM		7,093.00
223-200000				ACOUNTS PAYABLE CLEARING	7,093.00	
				FUND TOTAL	7,093.00	7,093.00

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|CITY OF NEW BERLIN
|A/P CASH DISBURSEMENTS JOURNAL
JOURNAL ENTRIES TO BE CREATED

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FUND	DUE TO	DUE FR
0010 GENERAL FUND	14,372.71	
0080 SEWER		3,553.86
0090 WATER		3,573.01
0200 LIBRARY DONATION FUND		152.84
0223 STATE EMS FUND		7,093.00
	-----	-----
TOTAL	14,372.71	14,372.71

** END OF REPORT - Generated by Thu Van Hintz **

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/2 TO 2026/2										
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION		
15810000										LIBRARY
15810000 54110										SUPPLIES
011840 US BANK	1/7/26PANERA-LIB	0	2026 2	INV	P	86.33	020826E1	10151	PANERA/STAFF LUNCH-	
						ACCOUNT TOTAL	86.33			
15810000 54230										LIBRARY MATERIALS
011840 US BANK	1/12/26AMZN-LIB	0	2026 2	INV	P	8.42	020826E1	10151	AMZN/VARIOUS TITLES	
011840 US BANK	1/12/26AMZN2-LIB	0	2026 2	INV	P	12.99	020826E1	10151	AMZN/VARIOUS TITLES	
011840 US BANK	1/12/26AMZN3-LIB	0	2026 2	INV	P	6.54	020826E1	10151	AMZN/VARIOUS TITLES	
011840 US BANK	1/12/26AMZN4-LIB	0	2026 2	INV	P	12.34	020826E1	10151	AMZN/VARIOUS TITLES	
011840 US BANK	1/12/26AMZN5-LIB	0	2026 2	INV	P	24.03	020826E1	10151	AMZN/VARIOUS TITLES	
011840 US BANK	1/13/26AMZN-LIB	0	2026 2	INV	P	43.55	020826E1	10151	AMZN/VARIOUS TITLES	
						107.87				
						ACCOUNT TOTAL	107.87			
						ORG 15810000 TOTAL	194.20			
FUND 0010 GENERAL FUND						TOTAL:	194.20			

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INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/13 TO 2025/13											
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION			
LIBRARY DONATION											
22810000											
22810000 55090 FOL											
011840 US BANK	12/16/25	SPOTIFY-LIB 0	2025 13	INV	P	17.84	020826E	10150	FOL#2537/SPOTIFY/MU		
						ACCOUNT TOTAL		17.84			
PROGRAMS-JUVENILE											
22810000 55100 FOL											
011840 US BANK	1/6/26	MILW MUSEUM 0	2025 13	INV	P	135.00	020826E	10150	FOL#2540/MILW MUSEU		
						ACCOUNT TOTAL		135.00			
						ORG 22810000 TOTAL		152.84			
FUND 0200 LIBRARY DONATION FUND						TOTAL:		152.84			

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01/29/2026 12:31 | CITY OF NEW BERLIN
 9740thin | A/P CASH DISBURSEMENTS JOURNAL

| P 1
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CASH ACCOUNT: 10 111000 CASH
 CHECK NO CHK DATE TYPE VENDOR NAME

CHECK NO	CHK DATE	TYPE	VENDOR NAME	VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
10151	02/08/2026	EFT	11840 US BANK - CREDIT CAR	DOCUMENT	INVOICE DTL DESC				
				253134	01/05/26WI CODE -EMR	02/08/2026	26524006	020826E1	150.00
					Invoice: 01/05/26WI CODE -EMR			WI CODE UPDATES/TRAINING-EMRGOV 1/5/26	
				253135	1/12/26GIPAW-IT	02/08/2026	26515013	020826E1	150.00
					Invoice: 1/12/26GIPAW-IT			GIPAW/MEMBERSHIP 2026-IT 1/12/26	
				253138	12/15/25CLEANRIVERS	02/08/2026	26700001	020826E1	135.23
					Invoice: 12/15/25CLEANRIVERS			CLEAN RIVERS/2026CONF REGISTRATION-STORM 12/15/25	
				253139	1/18/26DELANEY	02/08/2026	26530003	020826E1	700.00
					Invoice: 1/18/26DELANEY			DELANEY/2026 CONF REGIST-PLANNING 1/8/26	
				253140	1/8/26WI CODE-INSP	02/08/2026	26526001	020826E1	1,200.00
					Invoice: 1/8/26WI CODE-INSP			WI CODE/2026 CONF REGISTRATION-INSP 1/8/26	
				253141	1/9/26IEDC-DCD	02/08/2026	26529004	020826E1	385.00
					Invoice: 1/9/26IEDC-DCD			IEDC/MEMBERSHIP- 1/9/26	
				253142	1/13/26DIRECT TV	02/08/2026	26592023	020826E1	129.99
					Invoice: 1/13/26DIRECT TV			DIERCT TV/ARC SUBSCRIP-DCD 1/13/26	
				253143	12/16/25AMZN-REC	02/08/2026	26592024	020826E1	133.20
					Invoice: 12/16/25AMZN-REC			AMZN/WINTERFEST SUPPLIES-REC 12/16/25	
				253152	12/18/25AMZN2-REC	02/08/2026	26592024	020826E1	389.97
					Invoice: 12/18/25AMZN2-REC			AMZN/WINTERFEST SUPPLIES-REC 12/18/25	
				253160	12/21/25AMZN-REC	02/08/2026	26592024	020826E1	43.04
					Invoice: 12/21/25AMZN-REC			AMZN/WINTERFEST SUPPLIES CRAFT BEADS-REC 12/21/25	
				253181	1/2/26AMZN1-REC	02/08/2026	26592024	020826E1	203.08
					Invoice: 1/2/26AMZN1-REC			AMZN/WINTERFEST CRAFT SUPPLIES-REC 1/2/26	
				253182	1/2/26WALMART-REC	02/08/2026	26592035	020826E1	28.09
					Invoice: 1/2/26WALMART-REC			WALMART/ARC CONCESSIONS-REC 1/2/26	
				253183	1/2/26AMZN2-REC	02/08/2026	26592024	020826E1	8.59
					Invoice: 1/2/26AMZN2-REC			AMZN/WINTERFEST SUPPLIES-REC 1/2/26	

CASH ACCOUNT: 10 111000 CASH
 CHECK NO CHK DATE TYPE VENDOR NAME

VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
DOCUMENT	INVOICE DTL DESC				
253184	1/3/26AMZN-REC AMZN/WINTERFEST PRIZES-REC 1/3/26	02/08/2026	26592024	020826E1	55.69
Invoice: 1/3/26AMZN-REC					
253185	1/3/26KWIK TRIP-REC KWIKTRIP/ARC CONCESSIONS-REC 1/3/26	02/08/2026	26592037	020826E1	14.32
Invoice: 1/3/26KWIK TRIP-REC					
253186	1/4/26ROSATI-REC ROSATIS/ARC PLAYGRND BDAY PARTY-REC 1/4/26	02/08/2026	26592035	020826E1	49.95
Invoice: 1/4/26ROSATI-REC					
253187	1/6/26AMZN-REC AMZN/SUPPLIES/PUZZLE RACE-REC 1/6/26	02/08/2026	26592024	020826E1	56.94
Invoice: 1/6/26AMZN-REC					
253188	1/7/26AMZN1-REC AMZN/WINTERFEST SUPPLIES-REC 1/7/26	02/08/2026	26592024	020826E1	56.98
Invoice: 1/7/26AMZN1-REC					
253189	1/7/26AMZN2-REC AMZN/WINTERFEST HIKE SUPPLIES-REC 1/7/26	02/08/2026	26592024	020826E1	103.16
Invoice: 1/7/26AMZN2-REC					
253190	1/7/26AM RED CROSS- AM REDCROSS/BABYSITTER TRAINING-REC 1/7/26	02/08/2026	26592015	020826E1	467.37
Invoice: 1/7/26AM RED CROSS-					
253191	1/7/26VILLAGE/SUSSEX VILLAGE OF SUSSEX/DAYCAMP GROVE SPLASH PAD-REC 1/7	02/08/2026	26592014	020826E1	51.45
Invoice: 1/7/26VILLAGE/SUSSEX					
253192	1/8/26AMZN-REC AMZN/EXERCISE FITNESS BANDS-REC 1/8/26	02/08/2026	26592024	020826E1	54.32
Invoice: 1/8/26AMZN-REC					
253193	1/8/26MLBBREWERS MLB/BREWERS TIX/DAYCAMP OUTING-REC 1/8/26	02/08/2026	26592014	020826E1	1,265.00
Invoice: 1/8/26MLBBREWERS					
253194	1/8/26YORKBARBELL- YORK BARBELL/FITNESS EQPMT-REC 1/8/26	02/08/2026	26592017	020826E1	131.00
Invoice: 1/8/26YORKBARBELL-					
253195	1/9/26AMZN1-REC AMZN/WINTERFEST HIKE SUPPLIES-REC 1/9/26	02/08/2026	26592024	020826E1	19.98
Invoice: 1/9/26AMZN1-REC					
253196	1/9/26PICNSAV1-REC PICNSAV/ARC CONCESSIONS-REC 1/9/26	02/08/2026	26592035	020826E1	124.85
Invoice: 1/9/26PICNSAV1-REC					

CASH ACCOUNT: 10 111000 CASH
 CHECK NO CHK DATE TYPE VENDOR NAME

VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
DOCUMENT	INVOICE DTL DESC				
253197	1/9/26PICNSAV2-REC PICNSAV/ARC CONCESSIONS-REC 1/9/26	02/08/2026	26592035	020826E1	35.41
Invoice: 1/9/26PICNSAV2-REC					
253198	1/9/26GFS STORE1-REC GORDON FOODS/ARC CONCESSIONS-REC 1/9/26	02/08/2026	26592035	020826E1	56.55
Invoice: 1/9/26GFS STORE1-REC					
253199	1/9/26GFS ECOMM1-REC GORDON FOOD SERVICE/ARC CONCESSIONS-REC 1/9/26	02/08/2026	26592035	020826E1	194.35
Invoice: 1/9/26GFS ECOMM1-REC					
253200	1/9/26GFS ECOMM-REC GORDON FOOD SERVICE/ARC CONCESSIONS-REC 1/9/26	02/08/2026	26592035	020826E1	477.57
Invoice: 1/9/26GFS ECOMM-REC					
253201	1/9/26CROWN AWARDS- CROWN AWARDS/NBYA TROPHIES/RIBBON MEDALS-REC 1/9	02/08/2026	26592020	020826E1	833.69
Invoice: 1/9/26CROWN AWARDS-					
253202	1/9/26AMZN2-REC AMZN/WINTERFEST HIKE LIGHTS/SOUND-REC 1/9/26	02/08/2026	26592024	020826E1	60.97
Invoice: 1/9/26AMZN2-REC					
253203	1/10/26KWIKTRIP-REC KWIKTRIP/ARC CONCESSIONS-REC 1/10/26	02/08/2026	26592035	020826E1	38.94
Invoice: 1/10/26KWIKTRIP-REC					
253204	1/12/26AMZN-REC AMZN/FRONT DESK PRINTER INK RIBBON-REC 1/12/26	02/08/2026	26592024	020826E1	118.00
Invoice: 1/12/26AMZN-REC					
253205	1/12/26WALMART-REC WALMART/DAY CAMP-REC 1/12/26	02/08/2026	26592035	020826E1	39.51
Invoice: 1/12/26WALMART-REC					
253206	1/13/26ROSATIS-REC ROSATIS/STAFF LUNCH-REC 1/13/26	02/08/2026	26592009	020826E1	83.21
Invoice: 1/13/26ROSATIS-REC					
253209	1/6/26EMPLOYME-HR EMPLOYME/TRAINING-HR 1/6/26	02/08/2026	26504002	020826E1	30.00
Invoice: 1/6/26EMPLOYME-HR					
253210	1/7/26PANERA-HR PANERA/LUNCH-HR 1/7/26	02/08/2026	26504003	020826E1	65.25
Invoice: 1/7/26PANERA-HR					
253218	1/13/26ZOROTOOLS-UT ZOROTOOLS/TUBING CUTTERS - UT 1/13/26	02/08/2026	26900011	020826E1	88.91
Invoice: 1/13/26ZOROTOOLS-UT					

CASH ACCOUNT: 10 111000 CASH
 CHECK NO CHK DATE TYPE VENDOR NAME

VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
DOCUMENT	INVOICE DTL DESC				
253225	1/12/26INTERSTATE-ST	02/08/2026	26562043	020826E1	160.31
Invoice: 1/12/26	INTERSTATE TRAILERS /PARTS-STREETS 1/12/26				
253226	1/2/26WI ARBORIST-	02/08/2026	26562045	020826E1	300.00
Invoice: 1/2/26	WAA ARBORISTS/CONF-STREETS 1/2/26				
253243	1/1/26CANVA-CLRK	02/08/2026	26516003	020826E1	149.90
Invoice: 1/1/26	CANVA/SUBSCRIPTION-CLRKS 1/1/26				
253244	1/8/26IIMC-CLRKS	02/08/2026	26516003	020826E1	235.00
Invoice: 1/8/26	IIMC/MEMBERSHIP-CLRKS 1/8/26				
253252	1/9/26ZAGG COM-FD	02/08/2026	26523007	020826E1	1,199.90
Invoice: 1/9/26	ZAGG COM/EQUIPMENT-FD 1/9/26				
253253	1/12/26AMZN-FD	02/08/2026	26523006	020826E1	41.05
Invoice: 1/12/26	AMZN/OFFICE SUPPLIES-FD 1/12/26				
253255	12/15/25WI LAW ENFO-	02/08/2026		020826E1	669.41
Invoice: 12/15/25	WI LAW ENFORCEMENT/2026WILEAG DUES-PD 12/15				
253256	12/30/25CHULA VISTA-	02/08/2026	26521021	020826E1	588.00
Invoice: 12/30/25	CHULAVISTA/TRAINING LODGING-PD 12/30/25				
253257	12/31/25KALAHARI-PD	02/08/2026	26521022	020826E1	327.00
Invoice: 12/31/25	KALAHARI/TRAINING LODGING-PD 12/31/25				
253258	1/2/26WI LAW ENFO-PD	02/08/2026	26521028	020826E1	797.01
Invoice: 1/2/26	WI LAW ENFORCEMNT/WILEAG AUDIT FEES-PD 1/2/26				
253259	1/2/26PEPPERBALL-PD	02/08/2026	26521037	020826E1	2,600.00
Invoice: 1/2/26	PEPPERBALL/TRAINING-PD 1/2/26				
253260	1/11/26RECONYX-PD	02/08/2026	26515004	020826E1	10.00
Invoice: 1/11/26	RECONYX/CAMERA LICENSE -PD/IT 1/11/26				
253261	1/13/26LOCAL GOV	02/08/2026	26505005	020826E1	25.00
Invoice: 1/13/26	LOCALGOV/WGFOA ANNUAL DUES-FINANCE 1/13/26				

CASH ACCOUNT: 10 111000 CASH
 CHECK NO CHK DATE TYPE VENDOR NAME

VOUCHER	INVOICE	INV DATE	PO	PAYABLES	NET
DOCUMENT	INVOICE DTL	DESC			
253277	1/7/26PANERA-LIB	02/08/2026		020826E1	86.33
Invoice: 1/7/26PANERA-LIB		PANERA/STAFF LUNCH-LIB	1/7/26		
253278	1/12/26AMZN-LIB	02/08/2026		020826E1	8.42
Invoice: 1/12/26AMZN-LIB		AMZN/VARIOUS TITLES-LIB	1/12/26		
253279	1/12/26AMZN2-LIB	02/08/2026		020826E1	12.99
Invoice: 1/12/26AMZN2-LIB		AMZN/VARIOUS TITLES-LIB	1/12/26		
253280	1/12/26AMZN3-LIB	02/08/2026		020826E1	6.54
Invoice: 1/12/26AMZN3-LIB		AMZN/VARIOUS TITLES-LIB	1/12/26		
253281	1/12/26AMZN4-LIB	02/08/2026		020826E1	12.34
Invoice: 1/12/26AMZN4-LIB		AMZN/VARIOUS TITLES-LIB	1/12/26		
253282	1/12/26AMZN5-LIB	02/08/2026		020826E1	24.03
Invoice: 1/12/26AMZN5-LIB		AMZN/VARIOUS TITLES-LIB	1/12/26		
253283	1/13/26AMZN-LIB	02/08/2026		020826E1	43.55
Invoice: 1/13/26AMZN-LIB		AMZN/VARIOUS TITLES-LIB	1/13/26		
		CHECK	10151	TOTAL:	15,526.34
NUMBER OF CHECKS	1	*** CASH ACCOUNT TOTAL ***			15,526.34
TOTAL EFT'S		COUNT	1	AMOUNT	15,526.34
		*** GRAND TOTAL ***			15,526.34

01/29/2026 12:31
9740thin

|CITY OF NEW BERLIN
|A/P CASH DISBURSEMENTS JOURNAL
JOURNAL ENTRIES TO BE CREATED

|P 6
|apcshdsb

CLERK: 9740thin

YEAR PER	JNL	SRC ACCOUNT	JNL DESC	REF 1	REF 2	REF 3	ACCOUNT DESC LINE DESC	T OB	DEBIT	CREDIT	
2026	2										
APP	10-200000						ACCOUNTS PAYABLE CLEARING		13,402.30		
	02/08/2026	020826E1	10151				AP CASH DISBURSEMENTS JOURNAL				
APP	10-111000						CASH			15,526.34	
	02/08/2026	020826E1	10151				AP CASH DISBURSEMENTS JOURNAL				
APP	70-200000						ACCOUNTS PAYABLE CLEARING		135.23		
	02/08/2026	020826E1	10151				AP CASH DISBURSEMENTS JOURNAL				
APP	218-200000						ACCOUNTS PAYABLE CLEARING		700.00		
	02/08/2026	020826E1	10151				AP CASH DISBURSEMENTS JOURNAL				
APP	90-200000						ACCOUNTS PAYABLE CLEARING		88.91		
	02/08/2026	020826E1	10151				AP CASH DISBURSEMENTS JOURNAL				
APP	223-200000						ACCOUNTS PAYABLE CLEARING		1,199.90		
	02/08/2026	020826E1	10151				AP CASH DISBURSEMENTS JOURNAL				
GENERAL LEDGER TOTAL								-----	15,526.34	-----	15,526.34
APP	10-150100						DUE TO/FROM		2,124.04		
	02/08/2026	020826E1	10151								
APP	70-150100						DUE TO/FROM			135.23	
	02/08/2026	020826E1	10151								
APP	218-150100						DUE TO/FROM			700.00	
	02/08/2026	020826E1	10151								
APP	90-150100						DUE TO/FROM			88.91	
	02/08/2026	020826E1	10151								
APP	223-150100						DUE TO/FROM			1,199.90	
	02/08/2026	020826E1	10151								
SYSTEM GENERATED ENTRIES TOTAL								-----	2,124.04	-----	2,124.04
JOURNAL 2026/02/3 TOTAL								-----	17,650.38	-----	17,650.38

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|CITY OF NEW BERLIN
|A/P CASH DISBURSEMENTS JOURNAL
JOURNAL ENTRIES TO BE CREATED

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|apcshdsb

FUND	YEAR	PER	JNL	EFF DATE	ACCOUNT DESCRIPTION	DEBIT	CREDIT
0010 GENERAL FUND	2026	2	3	02/08/2026	CASH		15,526.34
10-111000					DUE TO/FROM	2,124.04	
10-150100					ACCOUNTS PAYABLE CLEARING	13,402.30	
10-200000							
					FUND TOTAL	15,526.34	15,526.34
0070 WATER RESOURCE MGMT UTILITY	2026	2	3	02/08/2026	DUE TO/FROM		135.23
70-150100					ACCOUNTS PAYABLE CLEARING	135.23	
70-200000							
					FUND TOTAL	135.23	135.23
0090 WATER	2026	2	3	02/08/2026	DUE TO/FROM		88.91
90-150100					ACCOUNTS PAYABLE CLEARING	88.91	
90-200000							
					FUND TOTAL	88.91	88.91
0218 TOURISM COMMISSION	2026	2	3	02/08/2026	DUE TO/FROM		700.00
218-150100					ACCOUNTS PAYABLE CLEARING	700.00	
218-200000							
					FUND TOTAL	700.00	700.00
0223 STATE EMS FUND	2026	2	3	02/08/2026	DUE TO/FROM		1,199.90
223-150100					ACCOUNTS PAYABLE CLEARING	1,199.90	
223-200000							
					FUND TOTAL	1,199.90	1,199.90

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9740thin

|CITY OF NEW BERLIN
|A/P CASH DISBURSEMENTS JOURNAL
JOURNAL ENTRIES TO BE CREATED

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FUND	DUE TO	DUE FR
0010 GENERAL FUND	2,124.04	
0070 WATER RESOURCE MGMT UTILITY		135.23
0090 WATER		88.91
0218 TOURISM COMMISSION		700.00
0223 STATE EMS FUND		1,199.90
	-----	-----
TOTAL	2,124.04	2,124.04

** END OF REPORT - Generated by Thu Van Hintz **



Director's Report–*January and February 2026*

Natalie Beacom, Library Director

BUDGET: We are on target for our first quarter of the 2026 operating budget. I am monitoring line items, 54010 (Library Building and Grounds) closely to ensure we are able to meet commitments for mid-year projects. WCCF statements are attached separately. We received donations from the FOL to cover the Library's Book Page subscription (\$966), MakerStudio supplies (\$1000), and a new system for mobile and network printing (\$9307.64). We also received generous donations from patrons to support the Youth Services Department (\$7,000) and the general Library (\$1000).

BUILDING AND GROUNDS: Bob Skaggs, the City's new Facilities Manager, has helped manage a few key projects for the Library.

- The boiler unit that sprung a leak, in addition to the leak in YS and my office were fixed in January. The repairs to the ceiling in my office are near complete.
- Carpet corrections on the 1st and 2nd floors were finalized with Premier Carpeting, Inc. and final walk-through complete. While we are 100% satisfied with the carpet transition (Purple carpet) between the Youth Services and Fiction departments, Bob and I felt giving it a few weeks of traffic, cleaning and even a wash, might allow the carpet to fill in a few of spots we are concerned with. There is one strip of wood missing from the 2nd Floor. Our maintenance tech, Chris K., will be able to replace this.
- In his regular monitoring of the building, Chris K. identified a leak in the boiler system. The boot repair, along with a full flush of our heating system will be completed once it warms. The flushing will allow for all the dirt and microbial bits to be rid from the piping in the library.
- The Library's main project for 2026 will be the replacement of the chiller unit. This is DPW project and will be the removal/replacement of all piping from the handler, by the garbage containment unit, to the basement equipment. This will be service affecting. The Library's drive-through and book drop will be unavailable for at least a month. That project is anticipated to begin in the spring. I will be working with the Library team to develop a plan for service during this closure.
- A new City of New Berlin custodian was hired and assigned to the Library for shifts on Monday, Thursday and Fridays from 7:00a-3:30p, starting 2/12/25. Bob has provided staff with 'sparkle kits' to handle emergency cleaning. Parks crew members, Joe Balke and Rick Hoffman, have been helping fill-in custodian Nick, to provide additional custodian care for the building.
- We are awaiting a quote for a gutter project for holes appearing in a few spots on the west side of the Library.
- We have one exterior light that requires repair. Bob has hired a new technician who is an electrician. With the City's lift, we will be able to complete the cleaning and repair of the light's driver in-house, saving us money. Additionally, Bob has secured the drivers for the light unit in advance, so repair should be smooth and is queued up for once the new technician is onboarded.

- We are awaiting a quote to re-pave and paint lines in the Library's parking lot. We have tentatively identified Friday, April 10 as the work day.
- March 8-10, the Library's entire Biblioteca sorter system will be upgraded. We will try to keep this process as seamless as possible for patrons, but it will require us to manually check in items for this time period. The DPW is scheduled to assist with the removal of the old system.
- The Library's painting projects continue with the New Arrival and Media sections being painted in January. We will be painting the main fiction area next.
- Laura and Susan connected with a local friend, Bruce, who has many talents. Bruce re-upholstered ALL of our damaged chairs, saving the library thousands of dollars, and allowing us to rehabilitate solidly constructed wooden furniture.

CIRCULATION AND PROGRAMMING: Circulation was 33,117 in January, an increase of 5% from Jan. 2025. Children's materials were 16,146 of the total and 7,351 were Libby downloads. The MakerStudio welcomed 1,543 visitors, which was a whopping 59% increase from Jan. 2025.

January and February programming, across the board were a success. Our annual AARP Tax Preparation call intake was very busy, but in record time, patrons were able to schedule their appointments--all available appointments through April are full! Tiff's new "Indie Lens" series launched with a screening of the documentary, "The Librarians." Tiff also the leader for the Every Book Its Reader Book Club, celebrated with a Pot Luck before their January meeting. The Youth Services Department collaborated with the Nbfd to have firefighter's provide story time along with fire safety! They also concluded the Monster Truck Reading Challenge and began the Disney on Ice Reading Challenge. Virtual author talks, story times, birding education programs, art lectures, chair yoga, heart health and an offsite collaboration with the New Berlin Historical Society to learn about Ben Franklin, were highlights.

BRIDGES LIBRARY SYSTEM INVOLVEMENT/AUTOMATION: A catalog version from Vega was distributed early and we have received positive feedback on some of the newer account features. I am working with our website vendor to ensure we meet the new accessibility guidelines--we are compliant and will undergo additional testing over the next few months.

Primary acquisitions for library materials will now be through Libraria. We will augment with Amazon, and smaller vendors and support local booksellers for materials for specialty orders.

MEETINGS/OUTREACH: NBPL staff met for Community Relations, Safety, Wellness, Department Head, Senior Center, APL and various System meet-ups, in January and February. The Library's, Delaney, launched a collaboration with the NB Food Pantry to offer a Little Food Pantry in our library and the response has been very positive. Library Leadership met with the NBPD in January to discuss sheltering in place, and again in February, to discuss law enforcement at the library and receive an update on protocols. Natalie provided two Bridges Library System FOL Canva trainings in January and presented a program about library services at Deer Creek Village. She may or may not have told them she wanted a book mobile for the Library. We have developed a volunteer program for those who are interested in helping at the Library. For the first quarter, these opportunities include assistance with AARP call intake, de-acquisition, and help preparing MakerStudio programs. Volunteers trained for AARP call intake and more are coming to help the Adult Services Department in February and March. Due to staffing limitations, we were unable to attend the City's Winterfest, but contributed by letting the ARC borrow our curling lanes and equipment. We also launched our new gumball machine, which allowed users to adopt reading buddies for

25 cents. Winterfest's reading buddies were miniature penguins with snow hats, and February's reading buddies, were miniature axolotls. Kids are enjoying using the gumball machine and receiving the small caricature. The Library will host a de-escalation program with NAMI in May, the invitations were distributed in January. The Library Lane Quilters will be contributing quilts each month for display on the 2nd floor and for National Quilting Month, Becky and Laura are coordinating their beautiful artistry for the full month of March.

PERSONNEL: With January's operational schedule, we began lunch and dinner breaks for librarian staff throughout the week to match other teams throughout the building and offer flexibility with librarian staff flexibility. These breaks include *non-paid*, off desk meal breaks. The Circulation department has been absorb some of the impact during these breaks and patient as we develop process improvements. We are looking into specific software and kiosks to allow for patrons to self serve for network or mobile printing needs. This is a project sponsored by the FOL and we anticipate it helping streamline services for patrons and staff. The Library's leadership team prepared our agenda for the spring Staff Development Day in February and began the discussion of evaluation processes, which will begin in March. Library Volunteers will have the opportunity to undergo special safety training in February and in April as well. We have filled a Youth Librarian position, and are excited to welcome Mai Kao to the team. Additionally, we have filled an intern position-we will welcome Katie to the team in a few short weeks. Jack has encouraged us all to support Heart Health Awareness Month by wearing red on Tuesdays and Thursdays.

Library Meeting Space Policy

The primary purpose of identifying gathering spaces at the Library is to enable the library to extend its own programs to the New Berlin community. As a further service, the library offers the use of its space when available, for meetings and programs engaging in civic, educational, cultural, intellectual, or charitable activities.

Meeting room use requires an application, which will be reviewed and approved by the Library Office Coordinator and may require approval from the Library Director. Meetings may be scheduled only during the hours the library is open. Groups may reserve the meeting room(s) **a maximum of 12 times within a calendar** year, with an option for six additional reservations, based on availability. Applications are considered on a first-come, first-served basis and no group shall have exclusive rights to library facilities or grounds.

To reserve a meeting room, an online application must be submitted **a minimum of 5 business days** (Monday-Friday) prior to the meeting date to allow sufficient time for review and processing. The application is available on the Library's website: newberlinlibrary.org

Study Rooms (2nd floor Study Room A and E) use requires reservation through our website and may be scheduled **a week in advance** for a maximum of **2 hours per day**. **Other study rooms are not reservable and are offered on a first-come, first-served basis.**

Other areas of the facility or grounds are available during the Library's operating hours, and requests should be submitted to the Library Office Coordinator by emailing roomreservations@newberlinlibrary.org. Such requests will be reviewed by the Library Director, may require approval from the Library Board and may be subject to additional usage fees.

The New Berlin Public Library does not advocate or endorse the viewpoints of meetings or meeting room users. Informational flyers, advertisements, or any other publications issued by the group must explicitly state: **"The New Berlin Public Library and its Board of Trustees do not endorse or sponsor this event."**

Use of facilities must be in compliance with Library policies and all Federal, State and local laws; ADA, safety standards, and building-code requirements. This would include, but not be limited to, promoting or engaging in seditious activities. To meet eligibility, the library, at its discretion, may require groups to provide proof of insurance, residency and/or tax exemption.

Prohibited Uses

- Activities which result in financial gain for the room user, group, or organization. This includes, but not limited to, fundraising, money-making events, charging admission, selling merchandise, soliciting donations, or the promotion, advertising, or selling of services, programs, or products. The only exceptions are Library programs, and events hosted by the Friends of New Berlin Public Library, Inc.
- The collection or compilation of mailing or contact lists for any type of future solicitation.
- Animals, except those designated as service animals by ADA, are not permitted in the Library. Service animals do not include emotional support animals. Programs sponsored by the Bridges Library System are exempt.
- Return engagement by a group or organization that has made any abuse of the facilities or regulations in an earlier use of the Library.
- Any purpose which in the opinion of the Library Director or Library Board, may interfere with the use of the Library or other Library functions.

In the event a question is raised as to the objectives and activities of any organization requesting the use of the Library spaces, the Library Board of Trustees, at their next regularly scheduled meeting, shall be the final authority in granting or refusing permission for the use of the room.

Step 1: Do you qualify?

Eligible Groups:

- Waukesha County, non-profit:** Individuals, organizations, clubs, or groups must be based in Waukesha County. No fees required for room use.

- Waukesha County, for-profit:** Individuals, organizations (including condo and/or homeowner associations) or businesses based in Waukesha County. Meetings are held for internal conferences, staff training, or evaluation sessions. *(These meetings are closed to the public and/or potential customers.* **Fees:** Community Room, \$50; Other rooms, \$25.

- Outside Waukesha County, non-profit:** Individuals, organizations, clubs, or groups based outside Waukesha County who serve Waukesha County residents. No fees required for room use.

- New Berlin Residents:** Residents of New Berlin may hold social functions that follow the guidelines of this policy. These functions may take place during the Library's operating hours and are limited to a maximum of four hours, to include room set-up and take-down. **Fees:** Community Room, \$100; Heritage Center Meeting Room, \$50.

Step 2: Application

All applications must be completed in full, signed and submitted by the authorized adult representative of the group who will also be attending the meeting. Applicant must be at least 18 years of age to reserve a meeting room and accept responsibility for the conduct of the meeting and for any damages incurred. Children and young adults are encouraged to use the meeting rooms but only with the supervision of one or more adults at least 18 years of age.

Step 3: Fee Payment (if applicable)

The Library accepts cash or check made out to: *New Berlin Public Library*. Room and Equipment payment must be made at time of application if submitted in person, or within 5 business days by mail. If the application is not approved, payment will be returned. If a meeting is cancelled, the fee will be refunded only if cancellation is made at least 2 weeks prior to the scheduled event.

Equipment & Cleaning Fees: Should groups require the use of projection equipment, microphones or cables in the meeting space(s), there is a \$10 service fee. Non-Profit applicants are exempt from this fee.

Items may not be hung on or posted to windows, walls or doors. We ask that trash and recyclables be taken to the Library's outdoor garbage area to the rear of the building and that users vacuum the floor as necessary. Any spills should be reported immediately to the front desk. Should there be any additional cleaning required after a meeting by our custodial staff, a cleaning fee shall be assessed to the applicant holder.

Requests approved for the Library grounds will be assessed for additional service fees and may require State and/or local permits for sound, food service, staging, or additional fees or expense that usage may incur.

Step 4: Approval

Once the application status has been determined, the applicant will be contacted by email unless otherwise noted. This is generally done within 5 business days by the Library Office Coordinator.

Step 5: General information for Room Use:

- The library reserves the right to reschedule confirmed meeting room reservations to accommodate library sponsored programs and events.
- The [NBPL Code of Conduct Policy](#)- is enforced for all meeting room users and visitors. The Library retains the right to attend all meetings, programs and events conducted on the premises.
- Upon arrival and again at completion of your meeting, check-in or check-out at the following locations: **Community and Heritage Room use** – Front Circulation Desk
Marion Onesti Board Room use – Adult Services Reference Desk
- Your meeting must start and end at the times requested on your application. **All meetings must end, with the room reset at least 15 minutes prior to the library closing time. An additional fee of \$50 will be charged, if the room isn't vacated on time.**
- Materials may not be stored at the library before or after a room use. The library will not be responsible for any equipment or items left in the rooms.
- Chairs and tables must be cleaned and returned to the standard configuration. Food and non-alcoholic beverages are allowed in meeting rooms.
- Lighted candles, incense, any ignition device, or other sources of open flame, smoke are strictly prohibited.
- If a projector or microphone has been requested on your application, a set-up time to test equipment must be arranged with the Library Office Coordinator by calling 262-754-1816 or by emailing roomreservations@newberlinlibrary.org at least one week prior to the meeting date. **There is no technical support available during your meeting.**
- Two cancellations or failure to keep meeting reservations may result in denial of use for future meetings.
- In the event of severe weather, the library retains the right to cancel or limit the time a group or organization has reserved for library spaces. If possible, the library will attempt to contact the applicant in advance of severe weather cancellations.
- Any group or individual who is refused permission to use library spaces or who has other objections may appeal to the Library Board of Trustees by filing out the Meeting Room Appeal form and submitting it to the Library Director. The Library Board will hear the appeal at its next regularly scheduled meeting.

We do hereby waive any claim demand action or cause of action which we may have against the City of New Berlin and the New Berlin Public Library arising from the use of meeting space within the library, including but not limited to claims for personal injury or property damage. We do hereby further agree to indemnify and hold harmless the City of New Berlin and the New Berlin Public Library its officers, employees and assigns (the Parties Released) as and against any and all claims, demands, actions, expenses, costs or causes of action including actual attorney fees arising from our use of the New Berlin public library. This indemnification shall include but not be limited to claims for personal injury or property damage by the participants in our use of New Berlin Public Library facility space or grounds. The aforesaid indemnity shall not extend to actions caused solely by the gross negligence or intentional conduct of the Parties Released. Library property is under video surveillance as defined in Wis. Stat. § 942.08.

Approved by the Library Board 1/19/2026



New Berlin Public Library Circulation Policies

Adult Library Cards

Residents of Waukesha County and all other Wisconsin counties except Milwaukee County* are eligible for a card at no cost after presenting current identification and proof of residence.

*Residents (including children) of Milwaukee County are required to pay an annual fee of \$50.00. Milwaukee County residents who work in New Berlin are eligible for a library card at no charge after presenting current identification and proof of employment, e.g., check stub. (The card will be renewed yearly.)

Patrons are responsible for notifying the library if a card is lost or stolen or if there is a change of address, email, or phone number.

*Patrons who have a picture ID but cannot provide proof of residence, may be issued a renewable six-month library card at the discretion of the library. At least one form of valid contact (phone or email) is required. Patrons may then access the internet and online databases/services and borrow up to three physical items at a time from the New Berlin Public Library collections. Specialty items, other CAFÉ library materials, and interlibrary loans are prohibited.

Child Library Cards

A parent or guardian must be present to show current identification and sign the library card application. Parents or guardians are responsible for any fines or fees incurred by their children, and borrowing privileges for parents may also be suspended if a child's card has outstanding fines or fees of \$10.00 or more.

*Children that attend school in New Berlin but live in Milwaukee County may obtain a library card at no charge with current identification and proof of enrollment, e.g., report card, tuition statement. (The card will be renewed yearly.)

Checking Out and Loan Periods

New Berlin Public Library accepts a patron's valid library card from any of the CAFÉ Libraries (Bridges Library System) subject to the terms and conditions of that card and New Berlin Public Library policies. Patrons are responsible for everything checked out on their cards and any fines or fees incurred.

All items must be returned by the due date to avoid fines. There is **NO** grace period. Most library items are checked out for 3 weeks. **Exceptions** include, but are not limited to, the following:

- **Periodicals, new fiction** (less than 350 pages), **Lucky Day** items, and **DVDs** are **1 week**.
- **TV series DVDs** and **Wi-Fi Hotspots** are **2 weeks**.
- **Specialty items, including experience passes and items from the Library of Things, have different loan periods.**

Specialty items may require a signed policy and/or waiver. Patrons choosing to borrow these materials must understand and abide by these additional requirements.



Renewals and Returns

Many library materials may be renewed up to three times, provided no other users are waiting for the material. Materials may be renewed either in person, online, or by phone. The renewal period is the same as the original loan period. It runs from the date the item is renewed. Online renewals must be placed before 11:59 PM on the due date to avoid fines.

Renewals will not be accepted on materials with holds or special loan restrictions. Overdue materials may be renewed, but a fine will be assessed for the time between the original due date and the date of renewal.

*Extended loans may be granted to teachers, residents of senior communities, homebound users, and others at the discretion of the library staff.

Interlibrary Loan - Interlibrary loans (loans of materials from outside Waukesha and Jefferson Counties) are available to all Bridges Library System patrons with valid cards. (Milwaukee County residents registered at New Berlin Public Library can also participate in this service.) Interlibrary loan materials may or may not be renewed, depending on the lending library's policies. ~~Please~~ Contact the Interlibrary Loan Department 3-4 days before the item is due if a renewal is required.

24-hour book drops are available for the return of most library items. ~~(Please be aware of~~ Specialty-items with restrictions will be labelled. These book drops do not provide receipts for returns, and patrons are responsible for items returned through the book drops. If a return receipt is needed, please return your items in the building during open hours. If you have any questions about non-returned items, please check your account or call the library.

For your convenience, materials from other Bridges Library System libraries (Waukesha County and Jefferson County) may be returned at New Berlin Public Library. Likewise, New Berlin Public Library items may be returned to any library in the Bridges Library System.

Notices and Fees

Depending on the notification delivery option a patron chooses, a reminder notice will be emailed or sent by text 2 days before an item is due. An overdue notice will be emailed or sent by text when an item is 2 days overdue, and a second overdue notice will follow at 14 days. A letter will be mailed to the account address when an item is 21 days overdue. If an item is 60 days overdue, the account will be automatically billed for the item, and collection fees may apply.

Patrons will also be notified when their hold items are ready for checkout; the item will be held for four days at the circulation desk. Notification will be by phone, email, or text.

Notices are offered as a courtesy to our patrons; however, the library cannot guarantee that notices will be received. Interruptions in service for technical reasons, spam filters, filled mailboxes, phone carrier issues, etc., all contribute to missed notices. Therefore, it is the ultimate responsibility of our patrons to know their due dates and monitor their accounts. ~~Please call if you have questions.~~



Fines

- The standard book fine is **15¢ per day** for each item to a maximum of \$10.00 per item.
- The standard DVD and PlayAway View fine is **\$1.00 per day** to a maximum of \$10.00 per item.
- Wi-Fi Hotspots are **\$2.00 per day**; book club kits are **\$5.00 per day**.
- **Various fines apply for specialty items** with specific check-out and check-in requirements. Patrons are responsible for understanding these requirements.
- No fines are charged on days when the library is closed or for most children's materials checked out on children's cards with the following exceptions: PlayAway Views, backpacks, book bundles and STEM kits.

Patrons with charges of \$10.00 or more on their accounts will not be permitted to borrow items until balance is paid. **All fines and fees must be paid before holds and interlibrary loan items can may be checked out.**

Lost and destroyed **materials items** must be paid at replacement cost. The Library does *not* accept replacement **materials or equipment** bought by patrons. The fee for damaged items, packaging, bags, and replacement parts will be determined as necessary. Patrons owing fees totaling \$25.00 or more will be referred to a collection agency after two months.

Internet Computer Use

A valid library card is required to use the public Internet computers. A patron may prepay for copies by adding money to their library card **at the library service desks or kiosk**. No searches or work products **can may** be saved on the library computers, but work may be saved to a personal flash drive.

Library Board **Approved** _ ENTER DATE



Statement of Activity
New Berlin Public Library Fund
Org. Endowment
From Dec 1, 2025 through Dec 31, 2025

Fund Activity

Beginning Balance	\$25,077.03
-------------------	-------------

Receipts to Fund

Interest/Dividend Income	128.10
Realized Gain/Loss	22.31
Unrealized Gain/Loss	-69.19
Total Receipts	81.22

Distributions from Fund

Investment Custodial Fees	0.58
Investment Management Fees	16.62
Total Distributions	17.20

Ending Balance	\$25,141.05
Spendable Balance	\$800.00

Assets

<u>Type</u>	<u>Amount</u>
Liquid Assets	25,141.05



Donations / Payments

No donations or pledge payments for the statement period

Grants Awarded

No grants awarded in the statement period

<u>Grantee</u>	<u>Date</u>	<u>Amount</u>
<u>Description</u>		
n/a	n/a	n/a
n/a		



741 N. Grand Ave., #210
Waukesha, WI 53186

P 262.896.8080
W bridgeslibrarysystem.org

To: Waukesha County Library Boards
From: Brittany Larson, Bridges Library System Director
Date: February 4, 2026
Re: Proposed Library Standards for Waukesha County Library Board Endorsement Consideration

Waukesha County Board Chair James Heinrich appointed a Library Planning Committee in the summer of 2025 based on the need to update the County Library Services Plan as set forth in Wis. Stat. 43.11. The 13-member Committee worked on the Plan from August 2025 through February 2026. A new five-year County Library Services Plan was endorsed by the Committee on February 3, 2026, after a public hearing was held. Within the plan includes a proposed revision of county library standards. These proposed standards go into effect if adopted by the Waukesha County Board of Supervisors and the Waukesha County libraries, following the parameters outlined in Wis. Stat. 43.11(3)(d):

The plan of library services for a county may include minimum standards of operation for public libraries in the county. The county shall hold a public hearing on any standards proposed under this paragraph. The standards shall take effect if they are approved by the county and the public library boards of at least 50 percent of the participating municipalities in the county that contain, according to the most recent estimate prepared under s. 16.96, at least 80 percent of the population of participating municipalities in the county.

The Plan proposes a reduction to four of the numerical *Minimum to Exempt Standards* measures and maintaining the levels of two others. Each of these was reviewed carefully by the Committee. Table 1 below shows a summary of the recommended *Minimum to Exempt Standards*.

Table 1: Minimum to Exempt Standards Measures and Status

Measure	Status
Materials Expenditures per Capita	Reduced, see pages 22-23 of plan draft
Hours Open	Maintained, see pages 24-25 of plan draft
Full-time Equivalent Staff (FTE)	Reduced, see pages 26-27 of plan draft
Collection Size	Reduced, see pages 28-29 of plan draft
Internet Connected Public Computers/Devices	Reduced, see pages 29-30 of plan draft
Wireless Internet Access	Maintained, see page 31 of plan draft
OPTIONAL: Library Service Effort Ratio (LSER) (Replaces all <i>Minimum to Exempt Standards</i> listed above.)	Maintained, see pages 19-21 of plan draft

It is important to note that these proposed numeric benchmarks remain *Minimum to Exempt Standards*. They are not proposed as aspirational goals, but baseline expectations.

The proposed plan also calls for a continuation of the six *Quality Assurance Standards* to help ensure the County libraries are well managed and accountable (see page 31 of the plan draft).

Below are the *Quality Assurance Standards* the library board would be asked to certify annually:

- Library board members receive an orientation upon appointment to a library board.
- The library's website includes contact information of key staff and board members as well as board agendas and minutes.
- The library board conducts an annual review of its library director.
- The library budget includes funding to ensure professional development for the library director and staff.
- The library has an active strategic plan.
- The library adopts the core policies included in the *Wisconsin Public Library Tier One Standards*: 1) Circulation, 2) Collection Management, 3) Computer/Internet Use, 4) Meeting Room Use (as necessary), 5) Public Behavior (Rules of Conduct), and 6) Personnel.

In order for a library's municipality(ies) to qualify for exemption from the county library tax levy, the library must meet all of the *Quality Assurance Standards* above, as well as the first six numerical *Minimums to Exempt Standards* or the optional LSER in Table 1. The LSER is a mathematical calculation of the residents' use of libraries other than their own. If a library meets its target ratio, its municipal residents are not imposing an undue burden on neighboring libraries.

While the goal of the Plan is to assure that all libraries are operating at or above the *Minimums to Exempt* and are meeting all *Quality Assurance Standards*, the Plan recognizes that some libraries may suffer an occasional one-year setback. Therefore, the Plan allows a library a one-time exception during this county library plan cycle from meeting each of the *Minimums to Exempt* standards and *Quality Assurance Standards*. The Plan also allows for additional exceptions for unanticipated events such as a worldwide pandemic. However, if the LSER is chosen by a library in lieu of meeting the first six numerical *Minimums to Exempt*, an exception may not be applied to meeting the LSER target ratio.

Finally, all standards requirements are in addition to the library's municipal requirement to meet or exceed the county library tax rate as required in Wis. Stats. 43.64 (2) or, in the case of a joint library, to fund its library at not less than the average of the previous three years as allowed in 43.64 (2) (c).

To assist you in understanding what your library's 2027 requirements would be, your library's *Minimums to Exempt* (based on 2025 Wisconsin Department of Administration population data) are shown in Appendix D of the plan draft (pages 48-53). A sample of how the LSER calculation works (using the most recent data available: 2025 circulation data for 2026 levy exemption) is also shown on pages 19-20 of the plan draft. Appendix C of the plan (pages 44-48) shows the *Minimums to Exempt* criteria along with the requirements across the entire graduated population range should

you wish to project your community’s growth over the next five years.

Because we hope to have the new plan in effect for the 2027 budget planning process, I request your library board consider these standards for possible endorsement at your February meeting. I would like to take this opportunity to thank your library director for their engagement in this important process, as well as those library directors, trustees, municipal officials, and citizens that sat on the committee or participated in thoughtful discussions throughout this planning term. Thank you for your consideration. Please don’t hesitate to contact me if you have any questions.

Waukesha County Library Standards Endorsement
--

Please fill out and return to the System office by February 25, 2026.

Endorsement: (Please check one)	<input type="checkbox"/> The library board DOES endorse the proposed standards <input type="checkbox"/> The library board DOES NOT endorse the proposed standards
Comments	
Library	
Date	
Name of Board President	
Signature of Board President	
Name of Library Director	
Signature of Library Director	



Waukesha County Library Services Plan 2027-2031



Pending Approval by the
Waukesha County Board of Supervisors

[INSERT DATE]

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Waukesha County Library Planning Committee

Committee Members

Timothy Dondlinger (Waukesha County Board) *Chair
Wayne Euclide (Waukesha County Board)
Abby Armour (Library Director, Mukwonago Community Library)
Maribeth Buggs (Waukesha County Resident)
Nan Champe (Library Director, Pewaukee Public Library)
Bruce Gay (Library Director, Waukesha Public Library)
Donna Hann (Town Clerk, Town of Merton)
Diane Knauer (Town Supervisor, Town of Eagle)
Diane Knutson (Bridges Library Board Trustee, Village of Summit)
Ann Lessila (Village Trustee and Library Board Trustee, Village of Menomonee Falls)
John Marek (Library Board Trustee, City of New Berlin)
Stephanie Ramirez (Library Director, Delafield Public Library)
Cathy Tuttrup (Library Director, Brookfield Public Library)

Advisory Participants

Brittany Larson, Bridges Library System Director
Mellanie Mercier, Bridges Library System Assistant Director/Automation Coordinator
Nicole Purifoy, Bridges Library System Executive Assistant
William Duckwitz, Waukesha County Budget Manager
Josh Selje, Waukesha County Senior Financial Analyst

Introduction

The Waukesha County Library Planning Committee recommends the following five-year plan that will encourage public libraries to deliver a continued standard of excellence for all residents. The value Waukesha County residents place on community and lifelong learning is evident in the high usage of their public libraries. This plan will continue to reinforce this strong foundation into the future.

Waukesha County libraries are municipal departments, governed by citizen boards appointed by their municipality. While all Waukesha County libraries are locally governed by their citizen boards, they take part in a two-county regional public library system that allows libraries to find efficiencies, innovate, and share resources. This arrangement gives residents access to a richer network of library services. Beyond a wider range of services, this collaboration also produces fiscal responsibilities. The citizens receive the benefit of strong, locally supported libraries without the undue burden that exists when one institution has the sole responsibility of providing all services and materials to meet its own community's needs.

What role do public libraries play in the modern age? The public library's core mission has been and continues to be supporting the information needs of a community. Despite improved search engines, the introduction of artificial intelligence, and the increased amount of information generated on the internet, libraries claim their own unique corner of the information world. This is seen through early literacy development in storytimes, well-used collections built by professionals for education and entertainment, access to technology infrastructure as a community equalizer, and safe third spaces for work and community gathering, all in response to growing acknowledgement of the ill effects isolation has on an individual. There are many organizational entities that can replicate elements of the above services, but public libraries are able to do so under one service profile and space, which allows for adaptability, efficiencies, and cost effectiveness.

The mission of Waukesha County government is to promote the health, safety and quality of life for citizens while fostering an economically vibrant community. Waukesha County recognizes that strong local libraries are essential to the quality of life for its citizens and help build strong, vibrant communities.

This Waukesha County library planning process reviewed historical trends and the current landscape of library services to best predict how this plan could support strong library services over the next five years. A reoccurring theme throughout this committee process was the challenge of balancing the need to provide a plan framework that supports quality library services against the reality of increasingly tight local budgets. While ultimately there are proposed reductions in library service standards within this plan, it is not the intent of the Committee to suggest that these reductions will support quality library services, and in fact may reduce services. Instead, the proposed reductions are a response to challenging budgets and the need to provide more flexibility to libraries and their library boards.

Role of the Wisconsin Public Library

Chapter 43 of the Wisconsin Statutes establishes the state’s policy regarding public libraries. Because Chapter 43 outlines certain responsibilities for counties in relation to library services, it is important to note that the statute emphasizes:

- ❖ The importance of providing all of Wisconsin residents free access to knowledge, information, and diversity of ideas;
- ❖ The critical role played by public, school, special, and academic libraries in providing that access;
- ❖ The major educational, cultural, and economic asset that is represented in the collective knowledge and information resources at the libraries in Wisconsin; and
- ❖ The most efficient and effective management of Wisconsin’s library resources occurs through resource sharing and collaboration.

Vision

Strong Libraries Build Strong Communities.

Waukesha County citizens are served by a vibrant system of well-managed, accessible, and connected libraries that are essential to building strong communities.

Mission Statement and Core Values

Waukesha County supports and strengthens high quality library services to its citizens through strong local libraries that offer a return on investment for taxpayers. All libraries are committed to operating with these core values:

- ❖ *Excellence*
- ❖ *Customer Service*
- ❖ *Fiscal responsibility*
- ❖ *Collaboration*
- ❖ *Integrity*
- ❖ *Innovation*
- ❖ *Community Engagement*
- ❖ *Connectivity*
- ❖ *Inclusion*

Statutory Requirements

Wisconsin Statutes Chapter 43.11 specifically addresses the requirements for county library planning. While library service plans can address any appropriate issues, Chapter 43.11 requires that counties address at least the following in their county library plan:

- ❖ How public library service will be provided to residents of those municipalities in the county not maintaining a public library (locally referred to as **True Non-Residents** or **TNR**);
- ❖ The method and level of funding that will be provided by the county in order to implement services described in the plan, including the reimbursement of municipal libraries for providing library service to in-county and adjacent county residents; and
- ❖ A method for allocating membership on the regional library system board between the counties in the regional library system.

County Library Planning is further codified in the Waukesha County Code of Ordinances (Chapter 11). This plan supersedes the *Waukesha County Library Service Plan: 2022-2026*.

Planning Process

County Board Chairman James Heinrich appointed a 13-member committee chaired by County Supervisor Timothy Dondlinger to undertake this most recent Waukesha County library planning effort. The committee met from August 2025 until February 2026. Seven meetings were held during this planning process. Library input was solicited and received throughout the process and meetings were open to the public. History from previous Waukesha County Library Services planning processes can be found in Appendix A.

A public hearing was held on February 3rd, 2026, to receive public input on the plan prior to approval by the Act 150 County Library Planning Committee. The plan then was presented to the Waukesha County Board for approval on **[INSERT DATE]**

This plan contains recommended revisions to the County's mandatory library *Minimum to Exempt* standards for exemption to the county library tax. Mandatory standards take effect if they are approved by the County Board of Supervisors and the public library boards of at least 50% of the participating municipalities in the county that contain, according to the most recent estimate prepared under Wisconsin state statute 16.96, at least 80% of the population of participating municipalities in the county.

2027-2031 Plan Highlights

- ❖ A recommendation to implement a new Waukesha County Funding Distribution Formula that has a goal of moving libraries closer to their unadjusted distribution goal.
- ❖ A recommendation to reduce the Materials Expenditure per Capita, FTE, Collection Size, and Public Computer Minimums to acknowledge the need for more flexibility with tight local budgets.
- ❖ A recommendation to retain the Hours Open and Wi-Fi Minimums as-is.
- ❖ A recommendation to retain the Quality Assurance Standards as-is, to help assure accountability.

County Profile

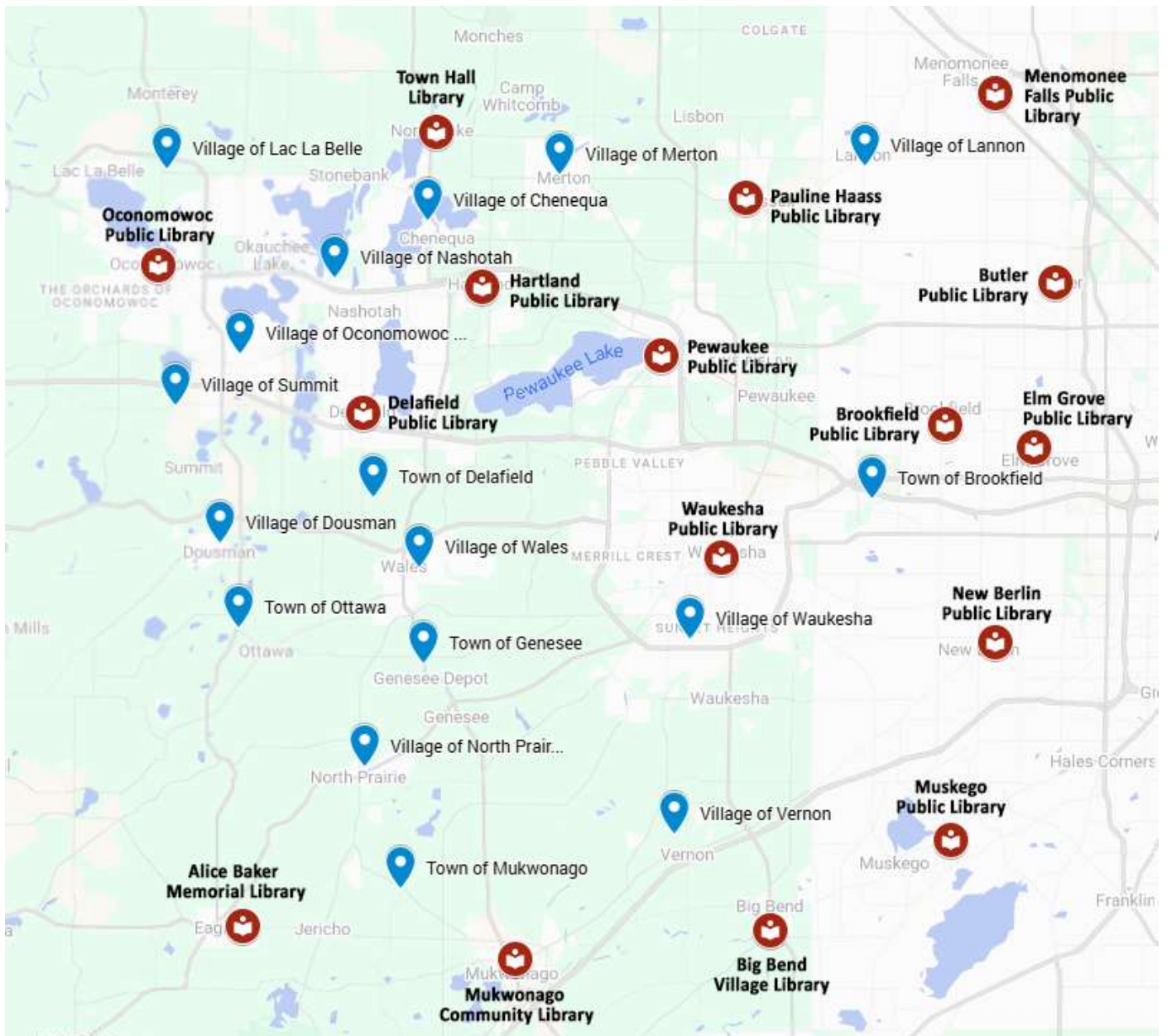
Understanding the trends in the population of Waukesha County provides the background for planning. The 2020 Census and 2023 American Community Survey from the U.S. Census estimates, as well as the State of Wisconsin Department of Administration (DOA) website showed following in Waukesha County:

- Approximately 417,230 people reside in Waukesha County, making it the third most populous county in the state.
- The median age is 43.5 years old.
- 20.9% of Waukesha County's population is 65 years or older.
- 20.7% of Waukesha County's population is under 18 years of age.
- There are an estimated 168,150 households – the average family size is 3.01.
- Approximately 9% of the population is disabled.
- 13% of the population in the county are minorities.
- Median household income is \$98,630. Median individual income is \$51,358.
- The poverty rate is 5.8% of county residents.

County Library Services Profile

There are sixteen public libraries supported by eighteen municipalities in the county providing library services (shown in Appendix E) to residents of Waukesha County. A resident may visit any of these public libraries to seek information, materials, and services. The sixteen libraries are located throughout Waukesha County (see Figure 1).

Figure 1. Waukesha County Libraries and TNR Communities



KEY	
TNR Community	
Municipal Library	

All Waukesha County residents who live in municipalities without libraries have access to the same services as residents of municipalities with libraries, as a condition of those libraries' membership in the regional public library system (per Wisconsin Statutes 43.15). These municipalities without libraries are also called True Non Resident (TNR) Communities and are shown in Figure 1 above.

Figure 2. Waukesha County Libraries

Big Bend Village Library	Brookfield Public Library	Butler Public Library	Delafield Public Library
Alice Baker Memorial Library (Town/Village Eagle)	Elm Grove Public Library	Hartland Public Library	Menomonee Falls Public Library
Mukwonago Community Library	Muskego Public Library	New Berlin Public Library	Town Hall Library (Town of Merton)
Oconomowoc Public Library	Pewaukee Public Library (City/Village)	Pauline Haass Public Library (Sussex)	Waukesha Public Library

The municipal libraries (Figure 2) were created under the authority of Wisconsin Statutes 43.52 of the Wisconsin Statutes by their respective municipalities and are governed by duly appointed library boards. The Pewaukee Public Library is a joint library between the Village and City of Pewaukee. The Alice Baker Library is a joint library between the Town and Village of Eagle. A single municipality operates each of the other libraries in Waukesha County. All public library boards must include the local school district superintendent, or their designee, as a member. In addition, one member of the municipal governing body may be appointed to the library board, and up to two members may be non-residents of the municipality.

Waukesha County does not own/operate a public library. Instead, through its annual budget process, it reimburses existing libraries for providing services to residents of those municipalities that do not have libraries of their own. The county has authority to appoint members to local municipal library boards in proportion to their level of funding as set forth in Section 43.60 of Wisconsin Statutes. Waukesha County does take advantage of making appointments when allowed by statute to ensure that it has a voice on a local library board it is helping fund. For example, of the eleven trustees of the Pauline Haass Public Library in Sussex,

four are Waukesha County appointees. See Appendix G for a chart of current library board member amounts, amount of board members that are county appointments, and what percent of each library's total budget is attributed to home county funding.

- As of 2026, 130,074 (31.18%) Waukesha County residents had library cards (cards active in last three years).
- Approximately 28,839 (6.91%) Waukesha County residents are Overdrive users (primary electronic book and electronic audiobook platform)
- 22% of the Waukesha County population live in communities without libraries (hereafter known as True Non-Residents or TNRs)

Regional Public Library Systems

Regional public library systems operate according to Wisconsin Statutes. 43.13 - 43.24 and have been in place in Wisconsin since 1971. The goal of library systems is to provide all Wisconsin residents with access to high-quality library service needed to meet personal, work, educational, and community goals. No county or public library is required to be a member of a library system, yet all of Wisconsin's 72 counties and 381 public libraries are library system members. Public library systems foster a strong network of resource sharing and mutually beneficial interdependence among community public libraries. Wisconsin's fifteen public library systems developed in distinct ways in response to the needs of their member libraries and area residents. They continue to evolve and respond as changes in society, resources, and technology create new demands and opportunities.

The Waukesha County Federated Library System (WCFLS) was formed in 1981 and operated as a single county library system until 2016. On January 1, 2016, Waukesha and Jefferson Counties joined to form the Bridges Library System, a federated library system that has all 24 autonomous municipal libraries working together to achieve efficiencies and collaborative power for quality library services. A strong library system means strong library services for citizens of both counties.

Currently, regional library system services for member libraries include management of the shared automation system (CAFÉ), database management, materials delivery service, professional development opportunities and resources, consulting services, inclusive services, youth services, technology support services, marketing services, website hosting, cooperative purchasing, provision of digital and online resources, provision of backup reference services, and wide area network management.

The Bridges Library System is committed to supporting member libraries through the above system services. System staff produce reports and maintain statistics within their management areas that can be used by member libraries to assess performance and guide strategic decisions, at both local and system levels. The regional library system board is kept up to date

on the performance of Waukesha County libraries and the system as a whole. Performance statistics are also provided during the Waukesha County library budget process.

Public Library Data Comparative Analysis

Waukesha County seeks to lead the way in terms of levels and types of library services as measured by state data. Analyzing how Waukesha County compares to other similar counties is important because it provides valuable context that takes into consideration what is happening in library services from a high-level perspective.

Library data is collected annually from all libraries in the state of Wisconsin and submitted to the Department of Public Instruction's Bureau of Libraries. In Wisconsin, the majority of digital ebook and eaudiobook content is owned collectively statewide or systemwide with public libraries and library systems financing access through license purchases. Usage of this digital content is counted through verifiable electronic circulation, meaning any license used by a patron can be tied to a specific library through software reports. Because all participating state member libraries own the shared digital collections, electronic collection size is not reported on the state annual report. Instead, the collection's existence is documented with yes or no affirmations. In late 2025 some public libraries in the Bridges Library System began exploring the purchase of individual licenses for local collections but it is too early as of the publication of this report to remark on trends.

Comparing service data of counties within the state with similar service populations helps to identify how the libraries in Waukesha are performing. Historically, the sixteen libraries in Waukesha County have ranked highly on important library performance measures based on state library data. Figure 3 provides Waukesha County information and rankings compared to those of the thirteen most populous counties in Wisconsin, using the most recent data available (2024) and comparing it to data from 2019, which was the data year used in the last county library plan five years ago.

As seen in Figure 3, Waukesha County remains a leader in the state on library service excellence. In many of these measures, performance rank has remained near the top of the state and remained steady over the years. This suggests a commitment to stable and quality library services. In areas where a rank has dropped (such as visits/capita) it should be noted that this reflects a diversification in how residents use the library instead of a lack of interest in library services, as both circulation per capita and circulation per visit have had percent increases from 2019. While eContent use continues to be an area of growth and interest to library users these metrics still show that physical checkouts and library visits remain vitally important to Waukesha County residents, who rank second in the state for circulation per capita.

Efficiency and fiscal responsibility for libraries remain important as they serve a wide range of ages, interests, and needs against tight local budgets. Waukesha County ranks second for materials expenditure per capita, but eleventh for expenditures per circulation. Knowing that Waukesha County ranks second in circulation per capita (meaning the investment in library materials is warranted), the extremely low expenditure per circulation shows that the ROI on the funds invested for the County residents is high. Public internet computers continue to be reduced by Waukesha County libraries as more users bring their own devices and prioritize the important utility of Wi-Fi in public libraries.

For the purposes of Figure 3, please note the following definitions:

- ❖ **FTE** stands for Full-Time Equivalent Employees indicated in library staffing levels.
- ❖ **Circulation** refers to the number of physical items checked out of libraries as opposed to items downloaded through library-sponsored websites unless listed as e-content circulation.
- ❖ **Visits** to libraries are recorded by attendance at the libraries, often by door counters.

Figure 3: Wisconsin Data for Comparable County Populations – 2024 Data (most recent available)

Service Measure	Waukesha Co. Actual 2024	Avg. Annual Change in 4 years	Other Counties Avg. in 2024	Avg. Annual Change 4 years - in other counties	Waukesha Co. Current Rank of Counties	Waukesha Co. Rank of Counties 5 Years Ago
Per Capita \$ - Local	\$52.76	11%	\$39.25	-1%	5	3
Per Capita \$ - County	\$45.97	19%	\$36.97	19%	2	3
Per Capita \$ - Combined	\$51.28	13%	\$43.63	8%	4	3
Circulation						
Circulation per visit	2.9	30.0%	2.56	44.9%	4	4
Circulation per capita	12.3	6.0%	7.79	-4%	2	2
Reference questions/capita	0.72	-12%	0.43	-29.3%	2	2
Materials expenditures/capita	\$5.40	-3%	\$3.92	-5.0%	2	2
Circulation per open hour	106.66	11%	70.68	-1.2%	2	2
Visits/capita	4.3	-17%	3.35	-26.8%	4	3
FTE per 1000 population	0.57	-2%	0.49	-7.8%	4	3
Expenditure/circulation	\$4.46	7%	\$6.19	6.2%	11	11
Public Internet Computers per 1,000 pop	0.52	-47%	0.66	-32.1%	9	6
E-content circulation per capita	3.27	162%	1.8	73%	3	3

*12 comparison counties: Brown, Dane, Kenosha, La Crosse, Marathon, Milwaukee, Outagamie, Racine, Rock, Sheboygan, Washington, and Winnebago

Key Strategic Issues

1. County Funding Collection Formula
2. County Funding Distribution Formula
3. Required Standards: Minimums to Exempt from the County Library Tax and Quality Assurance Standards
4. Library Establishment
5. Relationships with Others
6. CAFÉ Shared Automation System
7. Regional Library System Membership and Services

Strategic Issue #1. County Funding Collection Formula

Wisconsin public libraries are funded through a variety of sources. While local municipal funding is usually the primary funding source, county funding is also a significant source of funding to libraries (see Appendix G). County funding is required by state law, acknowledging the library services provided to a large number of residents living in municipalities without libraries. Act 150 introduced a requirement in state statute that sets forth a minimum rate at which counties must tax communities without their own libraries for their residents' library use. Waukesha County Ordinance 11-4 sets requirements beyond the minimum required in state law. The ordinance can be found on the Waukesha County website under the Code of Ordinances section.

The county library tax allows for exemption by library communities, if the community's tax for its library appropriation meets or exceeds the county library tax mill rate from the prior year or, in the case of a joint library, must not be less than the average of the previous three years. The community's library must also meet or exceed any adopted county library standards authorized by state statute and codified as enrolled Waukesha County Ordinance 11-6.

The County Library Planning Committee reviewed the current county library collection formula and evaluated it against an alternative model. The Committee recommends the current formula continue to be used. The amount collected from residents of Waukesha County municipalities without their own libraries through the county library tax is determined by multiplying the total amount of circulation to non-library community residents (TNR) as a percentage of total countywide circulation of physical and electronic materials (Figure 6.) by the

total allowable operating costs of all county libraries (Figure 5.). Figures 4-6 showcase the most recent data available (for the 2026 budget process) to model the collection formula.

The circulation of both physical and electronic materials have been included in the collection formula since 2022. By including both forms of circulation, the ratio of library use by residents of non-library and library municipalities can be most accurately measured and provide a more equitable reimbursement for library services. Figure 4 showcases TNR use of physical materials only, to help illustrate where TNRs are doing library business in-person.

Figure 4. TNR Usage of Libraries in Waukesha County (2024 data for 2026 Budget) Physical Materials Only

Library	Circulation to WK County TNR		Total County Circulation		TNR Ratio
Big Bend	7,215	÷	14,800	=	48.75%
Brookfield	35,670	÷	532,097	=	6.70%
Butler	1,076	÷	29,038	=	3.71%
Delafield	121,803	÷	191,419	=	63.63%
Eagle	4,187	÷	32,634	=	12.83%
Elm Grove	1,207	÷	88,280	=	1.37%
Hartland	66,460	÷	214,545	=	30.98%
Menomonee Falls	10,547	÷	354,534	=	2.97%
Merton	16,368	÷	56,285	=	29.08%
Mukwonago	118,697	÷	211,808	=	56.04%
Muskego	11,340	÷	223,618	=	5.07%
New Berlin	7,609	÷	344,073	=	2.21%
Oconomowoc	92,352	÷	258,705	=	35.70%
Pewaukee	35,959	÷	258,917	=	13.89%
Sussex	121,143	÷	335,456	=	36.11%
Waukesha	163,389	÷	817,227	=	19.99%

Figure 5. County Library Allowable Operating Costs 2025 for 2026 Budget

Allowable Costs Formula:

- A. Total Library Expenditures MINUS Total Library Revenues (2 yrs prior) = Overage or Lapse
- B. Overage or Lapse PLUS Total Library Projected Budget (year prior) = Allowable Costs

Library	Allowable Costs 2025
Big Bend	\$86,063
Brookfield	\$3,190,707
Butler	\$129,981
Delafield	\$1,018,104
Eagle	\$302,892
Elm Grove	\$626,766
Hartland	\$905,113
Menomonee Falls	\$2,319,300
Merton	\$665,381
Mukwonago	\$1,249,240
Muskego	\$1,490,527
New Berlin	\$1,717,368
Oconomowoc	\$1,382,505
Pewaukee	\$1,345,578
Sussex	\$1,389,956
Waukesha	\$4,701,068
Total Allowable Costs	\$ 22,520,549

Figure 6. 2024 TNR Circulation Percentages for 2026 Budget

Collection Formula	TNR Circ	÷	Total County Circ	=	TNR%
Countywide Totals (Physical Materials Only)	815,022	÷	3,962,001	=	20.571%
Countywide Totals (Electronic Materials)	173,034	÷	756,977	=	22.859%
Countywide Totals (Physical and Electronic)	988,056	÷	4,718,978	=	20.938%

While circulation statistics are a verifiable driver of use of public libraries by all residents, including TNRs, it should be acknowledged that libraries provide many other services across the

county, including programming, meeting spaces, and technology and building infrastructure. Libraries, including those that traditionally support large TNR communities, need to anticipate all these needs beyond material circulation when funding library operations.

In addition to using county libraries, some Waukesha County residents use out-of-county libraries. Most citizens choose to use libraries that are convenient to their home, workplace, or school, irrespective of geographic/tax boundaries. Sometimes that library is across a county line. Wisconsin Act 420 was enacted in 2005 and became Wisconsin Statutes 43.12 that requires reimbursements across county lines. This law allows libraries to invoice an adjacent county when residents of a non-library community in that county borrow items from libraries across county borders. This provision is known as “cross-county payments” or “inter-county funding.” Libraries receive reimbursements based solely on the number of physical items checked out to the non-library community residents. Libraries must be paid at a rate of 70% of their operating costs based on circulation.

It is far less expensive to reimburse an existing library than to build and operate a new library. Several libraries in Waukesha County are situated near one or more borders and provide significant services to citizens who live in adjacent county areas without libraries. Waukesha County libraries receive funding from those adjacent counties that is, in some cases, vital to their ongoing operations.

For 2026, the Waukesha County budget amount for inter-county funding will be \$41,682. That amount was added to the county library budget request in accordance with Wisconsin Statutes 43.12 and paid to libraries in adjacent counties. By way of comparison, Waukesha County libraries will receive \$511,791 (in 2026) in funding from adjacent counties. This funding remains critical to fair compensation for services in the region.

Goals and Objectives for Strategic Issue #1 - County Funding Collection Formula

Goal: Continue to collect data and make budget requests based on the formula set forth in Ordinance 11-4, state law, and pre-existing contracts.

Objective: The regional library system staff will annually review and verify all adjacent county library requests and incorporate reimbursements to non-county libraries into the county library budget request.

Objective: The regional library system staff will annually review a contract with Prairie Lakes Library System that compensates Waukesha County libraries for inter-county usage and incorporate both revenues and expenditures in the county library budget as well as seek the approval of the contract from the regional library system board.

Objective: The regional library system staff will annually review all library allowable costs information and circulation data (physical and electronic) and prepare the county library budget request based on library certified data.

Objective: The regional library system will annually prepare the municipal exemption notices and certification for compliance and report to the county the municipalities that qualify for the exemption from the county library tax.

Goal: Support the continuance of inter-county payments in Wisconsin.

Objective: The regional library system staff will monitor, inform stakeholders, and advocate to ensure that inter-county payments to libraries continue.

Strategic Issue #2. County Funding Distribution Formula

Wisconsin Statutes 43.12 requires that the county set the method and level of county library service funding, which must include reimbursement to public libraries for services to county residents of municipalities that do not maintain a public library. In Waukesha County, this is referred to as *True Non-Resident (TNR) Library Circulation*. According to the statute, each library must receive a reimbursement of at least 70% of the local unit cost for its TNR circulations (see Appendix H for the 70%-unit cost calculations for each library using 2024 data for budget year 2026).

TNR Library Circulation is distinguished from *Crossover Circulation*, which refers to residents of a library community using another community's library (either in-person or through interlibrary loan). The circulation adjustments in the current formula allow for net crossover lenders to be partially rewarded and for net crossover borrowing libraries to have their circulation amounts partially reduced to compensate the net lenders.

In the current formula, a library is given credit for sharing its materials with other libraries. Sharing allows libraries to achieve local savings and reduces unnecessary duplication. To discourage libraries from relying too heavily on other libraries by not purchasing enough to meet local demand and to compensate libraries which build strong collections that are borrowed by residents of other library communities, interlibrary loan traffic (items shared from one library to another via the system delivery services) is measured and factored into the distribution formula. How much a library sends versus how much the library borrows is netted and included as an element in the formula. Crossover Circulation (in-person and interlibrary loan) and TNR Library Circulation all factors into the credit a library gets in the distribution formula.

In the 2017-2021 Plan, an administrative change was made to the distribution formula. Instead of measuring the number of items transferred from one library to another (transits), the actual number of circulations of inter-library loan items within Waukesha County is the data element used. Because the automation system offers enough detailed reporting on the number of uses and ownership of materials at each library, this data can be recorded and used to more accurately measure a library's efforts to share with its partner libraries. Detailed information that showed the use of each library's materials for 2016 was analyzed and it was determined that this change offered the most accurate reflection of the data that gives credit to libraries that collect and share their materials.

In the 2022-2026 Plan, the inclusion of verifiable electronic circulation was added to the distribution formula for non-library residents (TNRs) to more accurately measure use and distribute funds, starting in 2023. The current formula, in existence (with some alterations) for many years, was created to address three (sometimes competing) objectives: fairness (taking into account library circulation effort through cross-over lending/borrowing, interlibrary loan, and TNR lending), stability in funding (5% or \$5,000 caps on changes in funding mid-way through the formula), and clarity (although multi-step, the formula is detailed explicitly in the annual budget document and county code).

The current Committee extensively reviewed the current distribution formula. An issue was raised to see if there could be greater progress made towards the fairness goal, identifying that some libraries were below their funding goal based on their circulation efforts (called the "unadjusted distribution goal") while others were funded past their unadjusted distribution goal. A formula from Jefferson County was modeled, along with six other models that used elements of the current Waukesha County distribution formula as a starting point. As models were studied, progress towards the unadjusted distribution goal (calculated in an absolute value ratio) was used to measure whether the new distribution formula was performing better in this regard. After much discussion, the Committee recommends a new distribution formula (Alternate F), outlined in Appendix B. This formula seeks to provide all libraries with an annual stability adjustment to their levy distribution (as long as the tax levy increases) of 50% of the allowable cost rate increase from the collection formula (subject to Act 150 Minimums), with any remaining surplus funds going to libraries below their unadjusted distribution goal. The purpose of placing a 50% cap on the allowable costs rate increase is to increase the likelihood of producing a surplus and the amount of the surplus produced, thus making more progress towards the unadjusted distribution goal.

The Committee respectfully requests that the next Act 150 Waukesha County Library Planning Committee analyze the performance of the new distribution formula over the life of the plan, to assess if it performed as intended or whether further adjustments need to be made to balance fairness and stability.

Goals and Objectives for Strategic Issue #2 – County Funding Distribution Formula

Goal: Implement the new distribution form (Alternate F) to allocate county funding to libraries.

Objective: The regional library system will compile all required physical and verifiable electronic circulation data to run the distribution formula.

Objective: The Waukesha County Budget Department will provide annual reporting on the performance of the new distribution formula, with analysis on its objective towards fairness through progress towards the libraries' unadjusted distribution goals.

Strategic Issue #3. Standards

The first Act 150 Committee recommended in 2000 that the county establish standards for libraries based on the state library standards. The purposes were to ensure that all county residents had access to at least a basic level of library service and, by doing so, to reduce the level of crossover borrowing (use by residents of one community at another community's library). In 2001, the Waukesha County Board adopted changes to Chapter 11 of the County Code of Ordinances based on the recommendations of the Act 150 Committee. The library standards reflected a rate of 85% of the basic level of the state numbers on the following four standards: staffing level, hours of service, collection size, and materials expenditures.

Over the years the standards have been assessed and adjusted to meet the changing landscape of library services. In 2021 the sub-committee recommended that the word "*Standards*" be changed to the phrase "*Minimums to Exempt*" whenever possible to reflect the fact that recommended levels are not aspirational in nature; they should be considered minimums. While the statute describes the benchmarks as *standards* in 43.11 (3) (d), in the county library plan and in conversation within Waukesha County they are better described as *Minimums to Exempt* from the county library tax as allowed in Wisconsin Statutes 43.64 (2m).

In addition to the standards adopted, a Library Service Effort Ratio (LSER) was approved and is described in Section 11-5 of the County Code. The LSER allows libraries an alternative method of meeting the Minimums to Exempt. A library community that does not meet its numerical standards can still claim exemption from the county library levy if it meets the LSER. The LSER is calculated by adding the number of item loans by a library to its own residents to the number of item loans to residents of other library communities and then dividing that sum by the total number of items borrowed by the residents of that municipality at all libraries in the county. The LSER allows library communities to retain exemption from the county library levy if their residents do most of their library business at home. According to the county plan, if most of a library's residents, most of the time, do most of their library business locally, the numerical

standards will not apply. This is because residents will not be imposing any undue burden on neighboring libraries.

- ❖ A ratio below 100% indicates that the community’s residents are borrowing materials from libraries other than their own and is referred to as a net borrowing community.
- ❖ A ratio over 100% indicates that the library is lending to other community’s residents in addition to their own residents and is referred to as a net lending community.

Figure 7. LSER Library Data from 2025 Data Year Used for 2026 Levy Exemption Consideration

	A	B		C		D	E	F
Library	Resident use of All Libraries	Library Lending to Other Library Community Residents		Resident Use of Own Library		Total Lending to Own Residents and Other Community Residents (Sum of Column B and C)	Library Service Effort Ratio (Column D Divided by A)	Target Rate
Big Bend	9,916	967	+	4,467	=	5,434	54.80%	80%
Brookfield	472,957	73,063	+	393,012	=	466,075	98.54%	95%
Butler	12,139	20,623	+	9,695	=	30,318	249.76%	80%
Delafield	65,861	23,348	+	47,768	=	71,116	107.98%	80%
Eagle	40,467	3,868	+	27,328	=	31,196	77.09%	80%
Elm Grove	85,066	26,472	+	61,090	=	87,562	102.93%	80%
Hartland	110,795	53,646	+	96,129	=	149,775	135.18%	90%
Menomonee Falls	419,874	17,809	+	333,585	=	351,394	83.69%	95%
Merton	76,700	7,905	+	33,868	=	41,773	54.46%	80%
Mukwonago	77,552	17,854	+	70,379	=	88,233	113.77%	80%
Muskego	191,910	20,873	+	180,351	=	201,224	104.85%	90%
New Berlin	356,290	37,026	+	308,951	=	345,977	97.11%	95%
Oconomowoc	169,895	15,363	+	150,402	=	165,765	97.57%	90%
Pewaukee	241,828	44,790	+	169,667	=	214,457	88.68%	90%
Sussex	143,699	84,777	+	129,019	=	213,796	148.78%	90%
Waukesha	627,068	77,603	+	560,331	=	637,934	101.73%	95%

Because larger libraries are assumed to be better able to address the needs of their own residents, population based LSER targets were developed. The population categories and target ratios are indicated in Figure 8.

Figure 8. LSER Target Ratios

Population	Target Ratio
Under 10,000	80%
10,000 to 29,999	90%
30,000 and over	95%

The current Waukesha County Library Planning Committee reviewed the LSER option and voted to continue using it for the 2027-2031 plan.

At the time the Committee ended in early 2026, a statewide committee was being formed to review the most recent 2018 state library standards. This work will occur throughout 2026. Due to the timing of this state committee in comparison to the Waukesha County planning process, the Waukesha County Library Planning Committee reviewed the current County Minimums to Exempt standards, making suggested changes based on tightening local municipal library budgets and the need for greater operational flexibility. The statewide standards can be reviewed at the next planning process for comparison.

The Minimums to Exempt are based on population of the library municipality, rather than by service area population, because the library’s municipality is the primary source of funding for libraries under the federated governance structure. The population from two years prior to the levy exemption year is used to calculate the Minimums. This allows library leadership the chance to know what their Minimums will be while budgeting for that levy exemption year. Example: Use 2023 population to calculate 2025 Minimums to Exempt for Levy Exemption. In mid-2024 when library leaders are planning their budget for 2025, the most recent DOA data will be 2023).

Figure 9. Population of Waukesha County Library Municipalities, Final Estimate 1/1/2025 WI DOA Data.

Library Municipality	Population of Municipality
Big Bend	1,490
Brookfield	41,453
Butler	1,758
Delafield	7,240
Eagle	5,683
Elm Grove	6,498
Hartland	10,161
Menomonee Falls	40,945
Merton	8,293
Mukwonago	8,850
Muskego	25,688
New Berlin	40,044
Oconomowoc	20,179
Pewaukee	24,507
Sussex	12,413
Waukesha	71,390

After thorough review, the 2025 Waukesha County Library Planning Committee recommended revisions to the county library Minimums to Exempt based on discussions with county public

librarians and committee input. The Committee recommended reductions to the Materials Expenditure Minimum, FTE Minimum, Collection Size Minimum, and Public Computer Minimum. The Hours Minimum, Wi-Fi Minimum, and the Quality Assurance Standards were retained in their current form.

The *Minimums to Exempt* for each factor based on a sliding population scale are shown in full in Appendix C. Each library's proposed 2027 *Minimums to Exempt* are shown in Appendix D.

Materials Expenditures Per Capita

Expenditures on library materials, and the size of libraries' physical collections have continued to change as a result of the growth in the size of digital collections. Yet, despite the continued growth in electronic materials usage, libraries still have a significant demand for physical materials. In 2025, physical circulation accounted for 83% of Waukesha County circulation to Waukesha County residents. Libraries are expected to use their annual materials budget to build a relevant current collection that is reflective of and responsive to their local community. The Materials Expenditures Per Capita Minimum to Exempt measure is intended to ensure libraries meet the current needs of the community by requiring libraries annually invest a minimum funding level for the purchase of materials, including electronic materials, as determined by materials expenditures based on the size of the municipal population. The phrase "per capita" is defined as "for each person" in the population.

In the 2017-2021 plan, the first 10,000 of the population was calculated at the \$6.00 per capita amount and the decreased rate of \$5.00 per capita was calculated on the portion of the population over 10,000. For the 2022-2026 plan, to acknowledge rising costs of materials, the committee recommended an inflationary increase. The first 10,000 of the population was calculated at the \$6.25 per capita amount and the decreased rate of \$5.25 per capita was calculated on the portion of the population over 10,000. The current Committee reviewed the Materials Expenditures Per Capita Minimum thoroughly in the context of tightening local budgets as well as the rising costs of materials due to inflation.

After much discussion, while inflation was acknowledged by the Committee, to create more flexibility within tight local budgets the recommendation was made to reduce the Materials Expenditure Per Capita Minimum to the 2023 minimums: \$6.00 per capita for the first 10,000 population and \$5.00 per capita on the portion of the population over 10,000.

A sample of the proposed Materials Expenditure Per Capita Minimums to Exempt based on municipal population are shown in Figure 10. The complete population table for Materials Expenditure per Capita requirements is shown in Appendix C. Individual library requirements are shown in Appendix D.

Figure 10. Sample of Materials Per Capita Minimums to Exempt

After the 10,000 population mark, the first 10,000/capita = \$6/capita and portion after = \$5/capita

Population	Material Expenditures	Expenditures/Capita Rate
1,000	\$6,000	\$6.00
1,500	\$9,000	\$6.00
2,000	\$12,000	\$6.00
2,500	\$15,000	\$6.00
3,000	\$18,000	\$6.00
3,500	\$21,000	\$6.00
4,000	\$24,000	\$6.00
4,500	\$27,000	\$6.00
5,000	\$30,000	\$6.00
5,500	\$33,000	\$6.00
6,000	\$36,000	\$6.00
6,500	\$39,000	\$6.00
7,000	\$42,000	\$6.00
7,500	\$45,000	\$6.00
8,000	\$48,000	\$6.00
8,500	\$51,000	\$6.00
9,000	\$54,000	\$6.00
9,500	\$57,000	\$6.00
10,000	\$60,000	\$5.00
10,500	\$62,500	\$5.00
11,000	\$65,000	\$5.00
11,500	\$67,500	\$5.00
12,000	\$70,000	\$5.00
12,500	\$72,500	\$5.00
13,000	\$75,000	\$5.00
13,500	\$77,500	\$5.00
14,000	\$80,000	\$5.00
14,500	\$82,500	\$5.00
15,000	\$85,000	\$5.00
15,500	\$87,500	\$5.00
16,000	\$90,000	\$5.00
16,500	\$92,500	\$5.00
17,000	\$95,000	\$5.00
17,500	\$97,500	\$5.00
18,000	\$100,000	\$5.00
18,500	\$102,500	\$5.00
19,000	\$105,000	\$5.00
19,500	\$107,500	\$5.00
20,000	\$110,000	\$5.00
20,500	\$112,500	\$5.00

Hours Open

The number of hours a library is open per week is an important factor in the level of service it provides to citizens. Some libraries have reduced hours over the summer months in response to community needs. Therefore, the requirement for the minimum number of hours open is represented in average hours per week during the school year. The Hours Minimum was reviewed by the current Waukesha County Library Planning Committee with the agreement that it would remain the same as the previous plan. The minimums for the number of open library hours per week based on population are shown in this chart. There is a base of 35 hours for populations 0-2,499 to provide minimum available service hours across Waukesha County. There are gradual one-hour increases starting at a population of 2,500, with two-hour bumps at key population markers (noted in green). This is to ensure the pacing gets to a minimum threshold of 60 hours for a population of 35,000 or above to meet the needs of growing communities and provide library support in that area without providing an undue burden on other library communities. The minimums for the number of open library hours per week based on population are shown in Figure 11 and Appendix C. Individual library requirements are shown in Appendix D.

Figure 11: Winter Hours Open/Week Minimums

Population	Hours Open/Week	Hours Increase/Pop. Tier
1,000	35	0
1,500	35	0
2,000	35	0
2,500	36	+1
3,000	38	+2
3,500	39	+1
4,000	40	+1
4,500	41	+1
5,000	43	+2
5,500	44	+1
6,000	45	+1
6,500	46	+1
7,000	48	+2
7,500	49	+1
8,000	50	+1
8,500	51	+1
9,000	53	+2
9,500	54	+1
10,000+	55	+1
15,000+	56	+1
20,000+	57	+1
25,000+	58	+1
30,000+	59	+1
35,000+	60	+1

Full Time Staff Equivalent (FTE)

Libraries are service-based institutions, which means having adequate staffing levels is a key input measure requirement. For a library to effectively serve its community, the number of full-time equivalent (FTE) staff should be related to the size of the population. It should be noted that the *Minimums to Exempt* benchmark is based on the number of staff budgeted, not actual employees. This allows for unforeseen circumstances such as staff vacancies.

In the 2022-2026 Library Services Plan, the FTE requirements had a minimum number of 2.0 FTE regardless of the size of the library's municipal population. An increase of 1.0 FTE occurred for each 1,000 of population above 2,000; based on the rationale that economies of scale are achieved once a library reaches a certain size. Therefore, the rate of the incremental increase was reduced at several population points and highlighted in green in Figure 12 below. The incremental rate of increase was first reduced after the population hit the 10,000 mark. At that point, the changes in staff required grew at a rate of approximately .10 per 500 population. Once a population hit the 25,000 mark, the rate of increase is further reduced. At that population point, the increases in staff required are reduced to a rate of .0095 per 500 population.

The current Committee reviewed the 2022-2026 FTE minimums. Having enough staff to handle daily operations was considered important to contributing to overall success for countywide library services, however acknowledging tight local funding and the need for budget flexibility the Committee recommended a reduction across all population tiers. From the 2022-2026 Plan FTE requirements (retaining the incremental reductions noted in green for economies of scale in the base), the following reductions were made:

0-2,999 population	0.25 FTE reduction from current Minimum
3,000-9,999 population	0.5 FTE reduction from current Minimum
10,000-beyond population	10% FTE reduction from current FTE Minimum

It should be noted that these FTE Minimum reductions were not based on an assessment of the FTE needs of a library to serve its community. Through Committee discussion and comments made in public hearing there were clear concerns brought forth that these lowered thresholds could lead to a reduction in services or a lowering in the quality of services. It is not the intent of the Committee to suggest these FTE Minimums are adequate, but rather to acknowledge the reality of difficult budgets and the desire to provide more flexibility to libraries and their boards.

The sample of the proposed FTE requirements recommended by the Committee are shown in Figure 12 below. The complete population table for FTE requirements is shown in Appendix C. Individual library requirements are shown in Appendix D.

Figure 12. Sample of FTE Staffing Levels Based on Population

Population	2027-2031 FTE	FTE Reduction from 2022-2026 Plan	Population	2027-2031 FTE	FTE Reduction from 2022-2026 Plan
1,000	1.75	-0.25	13,500	9.65	-10%
1,500	1.75	-0.25	14,000	9.75	-10%
2,000	1.75	-0.25	14,500	9.85	-10%
2,500	1.75	-0.25	15,000	9.95	-10%
3,000	2.50	-0.50	15,500	10.05	-10%
3,500	2.50	-0.50	16,000	10.15	-10%
4,000	3.50	-0.50	16,500	10.25	-10%
4,500	3.50	-0.50	17,000	10.36	-10%
5,000	4.50	-0.50	17,500	10.46	-10%
5,500	4.50	-0.50	18,000	10.57	-10%
6,000	5.50	-0.50	18,500	10.67	-10%
6,500	5.50	-0.50	19,000	10.78	-10%
7,000	6.50	-0.50	19,500	10.89	-10%
7,500	6.50	-0.50	20,000	11.00	-10%
8,000	7.50	-0.50	20,500	11.11	-10%
8,500	7.50	-0.50	21,000	11.22	-10%
9,000	8.50	-0.50	21,500	11.34	-10%
9,500	8.50	-0.50	22,000	11.45	-10%
10,000	9.00	-10%	22,500	11.56	-10%
10,500	9.09	-10%	23,000	11.68	-10%
11,000	9.18	-10%	23,500	11.80	-10%
11,500	9.27	-10%	24,000	11.92	-10%
12,000	9.37	-10%	24,500	12.04	-10%
12,500	9.46	-10%	25,000	12.16	-10%
13,000	9.56	-10%	25,500	12.28	-10%

Collection Size

In 2016 around 93% of circulation in Waukesha County was from physical materials. In the 2022-2026 Waukesha County Library Services Plan, it projected that 86% of countywide circulation was physical (using year-to-date 2021 data). Projecting on year-to-date 2025 circulation numbers, physical circulation is estimated to be 83% of all circulation. Despite physical circulation still being the overwhelming primary driver of circulation use in Waukesha County, demand is ever increasing for electronic materials. As such, county libraries have had to reallocate their collection budgets to satisfy this growth, while still maintaining strong physical collections.

In 2021, the Committee decreased the Collection Size Minimum for the 2022-2026 plan at the lowest population tier by 7.14% based on the proportion shift from physical to electronic circulation, with the rest of the incremental changes (highlighted in green in Figure 13) remaining the same as the population grew. The incremental changes were defined as this: for a population of 2,500 there is an incremental increase of 4,000 items per 500 population. At a population of 10,000, the incremental increase is reduced to 1,000 items per 500 population. At a population of 25,000 the increase is reduced to 800 items per 500 population. At a population of 50,000 the increase is reduced to 500 items per 500 population. The reduction in the base amount reduced the requirement for all libraries.

The current Committee explored another reduction of the Collection Size Minimum, in order to acknowledge that libraries are investing in electronic materials at the expense of some physical collection growth. The reduction selected was 8.5% (rounded up to the nearest one hundred). This time the percentage reduction was applied across all population tiers. 8.5% was selected, factoring in the 3% physical circulation proportion shift reduction from 2021 to 2025, and the knowledge that over the life of the plan this number is likely to continue to shift more to digital from physical. This reduction represents the redistribution of collection dollars into the electronic materials medium and sunsetting of aging physical mediums such as CD audiobooks and music CDs, while still providing an expectation of an investment into strong collections to ensure quality library services for citizens across the County.

The Collection Size Minimum is designed to only observe physical collection size, due to the fact that local library electronic collections are only just now being utilized in late 2025, are not system wide, and have not had a chance to be assessed over time.

The incremental change points are highlighted in green in Figure 13 below. The complete population table for Collection Size requirements is shown in Appendix C. Individual library requirements are shown in Appendix D.

Figure 13. Sample of Collection Size Minimum Based on Population

Population	Collection Size	Population	Collection Size
1,000	11,900	13,500	73,200
1,500	11,900	14,000	74,200
2,000	11,900	14,500	75,100
2,500	11,900	15,000	76,000
3,000	15,600	15,500	76,900
3,500	19,300	16,000	77,800
4,000	22,900	16,500	78,700
4,500	26,600	17,000	79,700
5,000	30,200	17,500	80,600
5,500	33,900	18,000	81,500
6,000	37,600	18,500	82,400
6,500	41,200	19,000	83,300
7,000	44,900	19,500	84,200
7,500	48,500	20,000	85,100
8,000	52,200	20,500	86,100
8,500	55,900	21,000	87,000
9,000	59,500	21,500	87,900
9,500	63,200	22,000	88,800
10,000	66,800	22,500	89,700
10,500	67,800	23,000	90,600
11,000	68,700	23,500	91,500
11,500	69,600	24,000	92,500
12,000	70,500	24,500	93,400
12,500	71,400	25,000	94,300
13,000	72,300	25,500	95,000

Number of Public Internet Computers

Public libraries continue to provide an essential bridge to critical daily technology needs of county residents. The number of residents bringing their personal devices to public libraries for work and study continues to grow. Yet it remains important for libraries to offer computers and internet to equalize access for all residents. In addition, there are growing trends of citizens no longer carrying printing/scanner/copying devices in home offices, and community members often come in to use library public computers and internet to complete this business.

In the 2022-2026 plan, the Public Computer Minimum was two computers for any size population and an increase of one computer for every 2,000 people from the 4,000 population tier onward. The current Committee decided to maintain the minimum number of two computers for any size population, but after that reduce the minimum by 50% (rounding down where there were halves). All devices available to the public with internet access qualify in a library's count (i.e. computers, laptops, and tablets).

Figure 14 shows examples of the minimum numbers of public internet computers based on population (only showing up to population size 22,500 based on space constraints). The requirements for all population sizes are shown in Appendix C. Individual library requirements are shown in Appendix D.

Figure 14. Sample of Public Internet Computer Requirements Based on Population.

Population	Computers/Internet Devices	Population	Computers/Internet Devices
1,000	2	13,500	3
1,500	2	14,000	4
2,000	2	14,500	4
2,500	2	15,000	4
3,000	2	15,500	4
3,500	2	16,000	4
4,000	2	16,500	4
4,500	2	17,000	4
5,000	2	17,500	4
5,500	2	18,000	5
6,000	2	18,500	5
6,500	2	19,000	5
7,000	2	19,500	5
7,500	2	20,000	5
8,000	2	20,500	5
8,500	2	21,000	5
9,000	2	21,500	5
9,500	2	22,000	6
10,000	3	22,500	6
10,500	3	23,000	6
11,000	3	23,500	6
11,500	3	24,000	6
12,000	3	24,500	6
12,500	3	25,000	6
13,000	3	25,500	6

Wireless Internet Access

Public wireless Internet access is extremely important for all libraries. Many people have their own devices and rely on libraries for their connection to the Internet. The Wireless Internet (Wi-Fi) Minimum requires that county libraries of all size populations offer wireless internet access as shown in Figure 15.

Figure 15. Wireless Access Requirement

Population	Wireless Access
≥1	Yes

Quality Assurance Standards

Part of the Waukesha County library services plan includes *Quality Assurance Standards*. Because these items are relevant to a library serving any size population and do not include numeric benchmarks, they are checklist items. Each library board has to respond “yes” to the requirement in order to meet the quality assurance standard. These *Quality Assurance Standards* are important because they help ensure that the libraries in the county will be well managed and accountable throughout the life of the plan.

The current *Quality Assurance Standards* are:

- ❖ Library board members receive an orientation upon appointment to a library board.
- ❖ The library’s website includes contact information of key staff and board members as well as board agendas and minutes.
- ❖ The library board conducts an annual review of its library director.
- ❖ The library budget includes funding to ensure professional development for the library director and staff.
- ❖ The library has an active strategic plan.
- ❖ The library adopts the core policies included in the Wisconsin Public Library Tier One Standards: 1) Circulation, 2) Collection Management, 3) Computer/Internet Use, 4) Meeting Room Use (as necessary), 5) Public Behavior (Rules of Conduct), and 6) Personnel.

The current Committee reviewed the existing *Quality Assurance Standards* and voted to keep them unchanged for the next plan.

Standards Implementation

All *Minimums to Exempt* and *Quality Assurance Standards* set forth in this plan are recommended to take effect January 1st, 2027 through December 31st, 2031. They will be implemented dependent upon adoption by the Waukesha County Board of Supervisors and the Waukesha County libraries as required in Wisconsin Statutes 43.11(3)(d).

The plan of library services for a county may include minimum standards of operation for public libraries in the county. The county shall hold a public hearing on any standards proposed under this paragraph. The standards shall take effect if they are approved by the county and the public library boards of at least 50 percent of the participating municipalities in the county that contain, according to the most recent estimate prepared under s. 16.96, at least 80 percent of the population of participating municipalities in the county.

Libraries would be allowed a one-time exception during the county library plan cycle for each of the standards items (the numeric *Minimums to Exempt*, as well as the checklist *Quality Assurance Standards*). In other words, in one year a library could not meet the staffing level and the planning requirements and still qualify for the county library tax exemption. However, the library would need to meet both of those requirements for the remaining four years of the plan. The following year, the library could not meet its materials expenditures requirement and still qualify for the exemption because it had not used an exception on this item in a previous year.

If conditions exist, such as the worldwide pandemic in 2020, that result in all or most libraries being unable to meet a particular standard, libraries will still be able to claim the exemption even if the one-time exception had been used previously. Additionally, any library that meets its LSER ratio (as previously described) automatically qualifies for the county library tax exemption relative to the *Minimums to Exempt* component of the requirement. Standards requirements are in addition to the library's municipal requirement to meet or exceed the county library tax.

Below are the steps established to implement the county library tax exemption based on the requirement that a municipality meet the tax levy requirement as well as the adopted *Minimums to Exempt* for its municipal population or LSER qualification for its municipal population and meet the *Quality Assurance Standards* for all libraries.

- **February** - Libraries file state annual report indicating the necessary data for hours, staffing, materials collection size, materials spending, number of computers and wireless access for the previous year. Reports are due to the state by March 1.

- **May** – The regional library system distributes to each library a letter indicating the library’s compliance with the *Minimums to Exempt* and LSER ratio based on the annual report of the previous year and the certification form approved by the library board that it intends to meet the *Minimums to Exempt* and *the Quality Assurance Standards* in the current year or provide a plan for return to compliance.
- **August** – Tax levy exemption information is distributed to libraries and municipalities in August. Exemption and standards compliance documentation is due by September 30 each year.
- **October** – The library system communicates to the county those municipalities that have met the requirements and are eligible to be exempt from the county library tax for the following year’s budget.
- **November** – Waukesha County Board of Supervisors sets the levy for the following budget year. The levy includes exemptions to the county library tax levy for communities with libraries that meet all criteria for exemption.

Goals and Objectives for Strategic Issue #3 – Standards

Goal: Revise the Waukesha County library standards to reflect the changing role of libraries, to create new minimum acceptable levels of resource inputs for library services within the county, and to provide quality assurance checks that will result in improved library services countywide.

Objective: The regional library system will seek the approval for the new *Minimums to Exempt* and *Quality Assurance Standards* at every library in Waukesha County.

Objective: The regional library system will seek the approval of the *Minimums to Exempt* and *Quality Assurance Standards* by the Waukesha County Board of Supervisors.

Goal: Monitor compliance with the *Minimums to Exempt*, *Quality Assurance Standards*, and municipal requirement to meet or exceed county library tax rate.

Objective: The regional library system will annually certify whether each library and library municipality has met its requirement to quality for the municipal exemption in the county library tax.

Strategic Issue #4. Library Establishment

There are sixteen established public libraries in Waukesha County. Since 1986, our state law has required county approval for a township to establish a library or form a joint library with an existing library. However, cities and villages are not required to gain such approval. Municipalities with libraries can choose to abolish those libraries at any time.

State library law allows a county board to disallow a proposed library or a joint library that includes one or more towns because of the potential impact that change could have on the county library tax base. No such prohibition exists for cities and villages. They can form libraries or join with existing libraries when they see fit.

It is critical that any proposed new library demonstrate that it can and will meet the county library *Minimums to Exempt* and *Quality Assurance Standards* before it is eligible for exemption from the county library tax.

Goals and Objectives for Strategic Issue #4 – Library Establishment

Goal: Monitor the county library landscape for new library establishments or partnerships so that all parties have the information needed for proper decision-making.

Objective: The regional library system will communicate information to all stakeholders about potential new libraries so that there is adequate time for all parties to respond to potential changes in funding.

Strategic Issue #5. Relationships with Others

While Act 150 and Act 420 provided much needed county funding for libraries in Wisconsin, Wis. Stats. 43.12 does not completely address the issue of non-resident use of municipal libraries. There are several exceptions that cause problems, especially in Waukesha County along the northern and eastern borders.

While Wisconsin law requires county funding for adjacent county library usage, Milwaukee County is excluded from the requirement. Communities that border Milwaukee County are free to serve or not serve Milwaukee County residents based on a local library board decision. Some libraries choose to serve residents of Milwaukee County because they believe the impact to be minimal and the commitment to open access worthy of an “open door” policy. Some libraries charge fees to residents of Milwaukee County in an attempt to receive some revenue from the residents for whom they are not being reimbursed with tax dollars. Other libraries choose not to serve Milwaukee County residents because they do not wish to have their residents subsidize people who are not at least partially funding the service.

Act 420 also does not require county funding for library usage across borders in the case of two communities with libraries that lie in close proximity to one another in separate counties and separate library systems. In Waukesha County, this problem is most severe in the case of the Menomonee Falls Public Library. The library is on the northeastern edge of the county, bordering Washington and Milwaukee Counties. The Menomonee Falls Public Library does not receive funding from Milwaukee County as previously described. Additionally, there are residents from the Village of Germantown (a community with a library) who would use the

Menomonee Falls Library if allowed to do so. Act 420 requires counties to pay for use by residents of only those communities without libraries—not communities like the Village of Germantown. The Menomonee Falls Public Library is allowed, by statute, to deny services to residents of any municipality with a library if the circulation is 500 or more. The Menomonee Falls Public Library board of trustees made the decision many years ago to deny library services to the residents of Germantown after a number of efforts to receive reimbursement failed.

Looking at the southern edge of Waukesha County, the Bridges Library System board has a long-standing agreement in place with Prairie Lakes Library System that adequately addresses the cross-county borrowing issues along the southern border. That agreement is between the two regional library systems and is reviewed/approved annually. On the western border, there are no significant issues not being adequately addressed by the provisions in Act 420.

Ultimately, whether a library board chooses to provide library service to citizens who are not providing any funding for that service is a local decision driven by philosophy and local circumstances. Due to the desire to maintain strong local autonomy, the committee does not recommend setting a countywide policy on whether local library service should be denied or allowed in the event of an adjacent county funding situation.

Goals and Objectives for Strategic Issue #5 – Relationships with Others

Goal: Ensure there is dialog in areas where there are denials of library service to citizens.

Objective: The regional library system will hold an annual meeting between Menomonee Falls Library and Germantown Library to share information and understand what is allowed as required by statute.

Objective: The regional library system will track the amount of usage by Milwaukee County residents in Waukesha County and share the information with libraries.

Strategic Issue #6. CAFÉ Shared Automation System

CAFÉ (Catalog Access for Everyone) is a shared integrated library system (ILS) created for the benefit of all the libraries in the county and in the regional library system. There are currently 24 public libraries in the CAFÉ automation consortium from Waukesha and Jefferson County.

CAFÉ is a member-funded consortium. That member ownership is considered important due to its essential role in the operation of a modern library. Not only does CAFÉ offer access to the citizens to all the materials owned by all the 24 member libraries, but it also provides the software for all circulation operations and related data gathering. Because CAFÉ does not rely

on state funding, it is not at high risk in the event of changes to regional library systems funding in Wisconsin. However, it is imperative that CAFÉ be sufficiently funded locally to ensure stability in operations and membership fees.

Goals and Objectives for Strategic Issue #6 – CAFÉ Shared Automation System

Goal: Continue to encourage CAFÉ cooperation and proper planning and funding to ensure it remains a viable option for Waukesha County libraries.

Objective: At least once during the plan, the regional library system will evaluate the effectiveness of CAFÉ from a user's perspective by conducting a user survey or other appropriate data collection methods.

Objective: The regional library system will provide oversight for CAFÉ operations and will annually set a CAFÉ budget that includes membership fees that provide sufficient funds to allow for regular hardware and software replacement.

Strategic Issue #7. Regional Library System Membership and Services

Waukesha County operated as a single county library system for almost 35 years until December 31, 2015. As such, there was not separation of the county library services and the regional library system. In fact, all county library administrative duties have been handled by the regional library system and the regional library system board has acted as a de facto county library board. Duties and roles between the various partners were clarified as a result of adding Jefferson County to the regional library system in 2016. Waukesha County was selected to be the fiscal agent for the newly formed regional library system. The regional library system staff was charged with carrying out the duties related to county library services as requested by the counties. Regional library system board member allocation was agreed upon between Waukesha and Jefferson Counties. Per Wisconsin Statute, the allocation is based on approximate population: Waukesha County has eight seats on the library system board and Jefferson County has three seats on the library system board. The ratio is to be revisited with each census.

The merger of the two counties was successful because it offered efficiencies that translated to reduced costs for local libraries, additional access to resources for citizens, and additional revenue in excess of expenditures that could be used to fund carefully selected strategic priorities.

At any given time there are a multitude of library professional conversations going on statewide, between one or more regional systems, with the state Bureau of Libraries, or state workgroups looking to find opportunities to innovate and collaborate with a goal of improved library services. The regional library system plays a key role in being present for these conversations, communicating relevant information back to member libraries, and helping facilitate member library engagement with these opportunities.

Goals and Objectives for Strategic Issue #7 – Regional Library Systems

Goal: Regional library system staff will be present for statewide library conversations and help communicate opportunities to member libraries.

Objective: The regional library system staff will participate in state library workgroups as available, representing the interests of Waukesha County libraries.

Objective: The regional library system staff will engage with State DPI Bureau of Libraries staff and other state regional public library system staff to remain connected to current library statewide conversations and identify opportunities for innovation and collaboration.

Plan Implementation

This county library plan will be presented for adoption to the Waukesha County Board of Supervisors upon approval by the county library planning committee. It will be filed with the Department of Public Instruction to meet the state’s county library planning requirements. A separate process will be used for the adoption of the revised county library standards. Because local library board action, in addition to county board approval, is required for library standards, that process will take additional time. In the event the county library standards are not approved (in accordance with the requirements in the statute), the current library standards will remain in place. In the event of that scenario, the county board of supervisors has the option to form a new county library planning committee or revive the past committee to review the standards and make new recommendations before the end of the adopted five-year plan.

Review of the Plan

This plan will be reviewed annually by the regional library system board. This is a five-year plan, and the expectation is that a new plan will be approved prior to the expiration of this plan. In the event of a change in library systems in the state of Wisconsin that results in a change to Waukesha County’s ability to rely on its regional library system to help support this plan, a county library planning committee will be convened to study options and create a new county library plan for consideration and approval by the Waukesha County Board of Supervisors.

Appendices

Appendix A

Waukesha County Library Planning History

Six county library plans have been approved in Waukesha County since the adoption of the 1998 Act 150 that changed Wisconsin library law requiring county library planning. The planning history for the previous plan (2022-2026) can be found below, and the entire Waukesha County Planning History can be found in Appendix A.

2001-2003 Plan

County Board Chair James Dwyer appointed the first Act 150 Committee, chaired by Karen McNelly. It met from September 1999 to March 2000. The committee made 15 recommendations. The main recommendations were:

- Retain the current federated status of the library system;
- Adopt a formula for collecting funds by a special county levy on the residents of the 19 communities without their own libraries;
- Adopt a formula for distribution of this funding to 16 county libraries;
- Adopt standards for library services;
- Study a shared automation system for county libraries; and
- Create a capital costs study committee.

The County Executive vetoed the standards provision, but the standards were re-introduced with a modification and passed by the County Board in 2001, for 2002 budget purposes.

2004-2006 Plan

County Board Chair James Dwyer appointed the second Act 150 Committee, chaired by Ken Herro. It met from September 2002 to March 2003. The committee made 15 recommendations. The main recommendations were:

- Retain the current federated status of the library system;

- Freeze the standards implementation schedule while state tax caps are in place. Lacking the freeze, the standards would have risen to the 90% level but were frozen at the 85%;
- Require any proposed new library to demonstrate that it can and will meet the standards established for Waukesha County before it is eligible for exemption from the county library levy;
- Retain the “Best Fit” formula for distributing to libraries the funds that are collected by a special county levy on the residents of the communities without their own libraries;
- Create a shared automation system for county libraries; and
- Create a capital costs study committee.

In August of 2003, the County Board approved a Capital Cost Study Committee. The County Board approved the capital costs proposal, but County Executive Finley vetoed it and the County Board sustained the veto.

2007-2011 Plan

County Board Chair James Dwyer appointed the third Act 150 Committee, chaired by Paul Kanter. It met from September 2005 to March 2006. The committee made 15 recommendations. The main recommendations were:

- Continue the standards implementation freeze;
- Establish a committee to review the formula for distribution of funds to county libraries;
- Encourage the CAFÉ Council to evaluate the effectiveness of the CAFÉ shared automation system and share the results with the WCFLS (Waukesha County Federated Library System) Board;
- Encourage the strengthening and improving of one automation system shared by all libraries in the county; and
- Defer consideration of WCFLS’ organizational form, local autonomy statement and library establishment until after the final result of the Library Governance Options report.

The committee reconvened in the fall of 2006 for consideration of these issues after the conclusion of the Library Governance Options Study. Major recommendations were:

- Remain a federated library system;
- Reaffirm local library autonomy;
- Establish a capital cost reimbursement program as included in the Act 150 report; and

- Adopt a provision for payments to libraries in adjacent counties as required in newly enacted state law 43.12(2), also known as Act 420.

In August of 2007, the County Board approved the resulting Capital Costs proposal, but County Executive Vrakas vetoed it and the County Board sustained the veto.

2008 - County Library Funding Committee

The County Board adopted the *Waukesha County Library Services Plan (2007-2011)* in June of 2006. It called for a re-examination of the then-current “Best-Fit” funding distribution formula in ordinance (11-4) that had been in place since 2000. The plan recommended that the County Board appoint a committee, chaired by County Supervisor Bill Mitchell. The Committee met from January 2008 to April 2008. The committee considered nine options, and its recommendations were:

- Implement a new formula for funding year 2009. The County Board agreed and passed an ordinance to this effect in June of 2008; and
- Appoint a new committee in three years to review the formula again for 2012 funding.

2012-2014 Plan

County Board Chair James Dwyer appointed the fourth Act 150 Committee, chaired by Richard Brandt. It met from March to June of 2011. The main recommendations of the committee were:

- Conduct at least two local library-planning efforts each year of the plan;
- Annually produce reports on member library services based on Wisconsin Library Service Record data that indicate the performance of libraries;
- Publicize successes through the media and continue to apply for awards;
- Remain a federated library system;
- Continue to use the adopted funding formula set forth in the ordinance;
- Continue to use the standards at 85% of the basic level on the voluntary standards published by the State of Wisconsin in the year 2000;
- Continue to offer the Library Service Effort ratio targets unchanged;
- Require that any new library demonstrate that it can and will meet standards before it is eligible for exemption from the county library levy; and
- Reaffirm local autonomy with library system oversight on library system compliance.

2017-2021 Plan

County Board Chair Paul Decker appointed the fifth Act 150 Committee, chaired by Dave DeAngelis. It met from August 2016 to March 2017. The main recommendations of the committee were:

- Update the standards to reflect the current Waukesha County library environment and include requirements based on a graduated population scale;
- Add new quality assurance standards to help ensure libraries' excellence;
- Change standards language to emphasize that the county library standards are "minimums to exempt" rather than aspirational;
- Change in the library distribution formula to more accurately credit libraries for sharing their materials; and
- Remove outdated language in the county code's library distribution formula in order to acknowledge the statutory authority vested in the regional library system board.

2022-2026 Plan

County Board Chair Paul Decker appointed the sixth Act 150 Committee, chaired by Dave DeAngelis. It met from July 2021-February 2022. The main recommendations of the committee were:

- Update the Minimum to Exempt standards to reflect the current Waukesha County Environment.
- Add new quality assurance standards to help ensure libraries' excellence.
- Change the definition of circulation in the county library funding collection and distribution formulas to include verifiable electronic circulation with the purpose of more fairly reimbursing libraries for service to residents living in municipalities without libraries.

Appendix B

Draft of Proposed County Library Tax Levy Distribution Formula (Alternate F)

(a) Purpose. To provide method of levy distribution that incorporates a stability component while working towards a fair distribution of levy dollars based on library's efforts of True Non-Resident (TNR) and net crossover borrowing/lending circulations.

(b) Definitions. For purposes of this section:

1. *Circulation* shall mean materials borrowed from a library in the year prior to the year in which the Library Tax is levied.
2. *True Non-Resident (TNR) Library Circulation* shall mean the total annual amount of circulation (electronic or physical) that a Waukesha County municipal library lends to residents of Waukesha County communities without libraries.
3. *Crossover Lending (COL) Circulation* shall mean the lending of library materials, in person or by inter-library loan by a Waukesha County municipal library to residents of another Waukesha County municipal library community.
4. *Crossover Borrowing (COB) Circulation* shall mean the borrowing of library materials, in person or by inter-library loan, from a Waukesha County municipal library by residents of another Waukesha County municipal library community.
5. *Net Crossover Circulation (COC)* shall mean a Waukesha County library community's total annual Crossover Lending Circulation, less its total annual Crossover Borrowing Circulation.
6. *Net COC/TNR* shall mean the sum of a Waukesha County library community's total annual True Non-Resident Library Circulation and Net Crossover Circulation (in person or by inter-library loan).
7. *Only Positive Net COC/TNR* shall mean, for each Waukesha County library with a positive Net COC/TNR the proportion of the sum of all positive Library County Levy Circulation Effort.
8. *Allowable Costs* shall mean the sum of all current library budgets plus an adjustment for prior year actual expenditures and revenues that shall be made by calculating the sum of the difference of actual year-end figures for allowable expenditures made and revenues received and either reducing or increasing the current year budget adopted by the Waukesha County system member library boards by that overage (increases current

year budget) or lapse (decreases current year budget) for the purposes of calculating allowable costs.

9. *Act 150 Minimum* shall mean the minimum amount of Waukesha County Library Levy that a library must receive according to Wisconsin Statute 43.12(1)(b). This requires that each library receive an amount equal to at least 70% of their unit cost per circulation, incurred during the year prior to the levy being imposed, multiplied by the library's total circulation lent to Waukesha County Non-Residents.

10. *Unadjusted Distribution Goal* shall be calculated as the sum of a library's Act 150 minimum plus any excess revenue multiplied by each library's proportional Positive Net COC/TNR. Excess revenue is defined as remaining County Library Levy revenue after Act 150 minimum provided.

(c) The County Library Levy Distribution Formula determines funding for Waukesha County member libraries through the following steps:

1. An initial allocation is intended to provide stability in funding. If there is an increase in the Waukesha County Library Levy, each library will receive an increase of 50 percent of the percentage increase in allowable expenditures. If that increase is insufficient to fund a library's Act 150 minimum, their allocation will be further increased to that amount. If the overall Waukesha County Library Levy remains flat or decreases, there is no funding allocated at this stage, except to increase a library's funding to meet its Act 150 Minimum, if necessary.
2. The second allocation for each library's annual share of the Waukesha County Library Levy shall be determined from the remaining annual levy after the second allocation. If there is a remaining surplus, only libraries with a "*Positive Net COC/TNR*" that are below their unadjusted distribution goal will receive the remaining funds, allocated based on the proportion each of these libraries is under their unadjusted distribution goal.
3. If the stability adjustment in (1) results in a deficit, whereby the total distribution exceeds available Library Levy, a decrease is applied proportionally based on the preliminary distribution, excluding libraries that received a step up to their Act 150 Minimum, until the total reduction is sufficient to offset the deficit.
4. During years when the Library Tax Levy decreases, the prior year distributions are first stepped up to the Act 150 minimum, if necessary. Decreases are then applied proportionately to libraries who exceed their unadjusted distribution goal based on the remaining amount to get to the unadjusted distribution goal.

Appendix C

Minimum to Exempt for Each Service Factor Based on Municipal Population^{1, 2}

¹MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

²2025 DOA pop. most current available for 2027 budget planning, will be the pop. used for 2027 standards

³ See footnote three at the bottom this chart on page 48

Population	Materials Expenditures ³	Materials Exp. / Capita ³ Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
1,000	\$6,000	\$6.00	35	1.75	11,900	2	Yes
1,500	\$9,000	\$6.00	35	1.75	11,900	2	Yes
2,000	\$12,000	\$6.00	35	1.75	11,900	2	Yes
2,500	\$15,000	\$6.00	36	1.75	11,900	2	Yes
3,000	\$18,000	\$6.00	38	2.50	15,600	2	Yes
3,500	\$21,000	\$6.00	39	2.50	19,300	2	Yes
4,000	\$24,000	\$6.00	40	3.50	22,900	2	Yes
4,500	\$27,000	\$6.00	41	3.50	26,600	2	Yes
5,000	\$30,000	\$6.00	43	4.50	30,200	2	Yes
5,500	\$33,000	\$6.00	44	4.50	33,900	2	Yes
6,000	\$36,000	\$6.00	45	5.50	37,600	2	Yes
6,500	\$39,000	\$6.00	46	5.50	41,200	2	Yes
7,000	\$42,000	\$6.00	48	6.50	44,900	2	Yes
7,500	\$45,000	\$6.00	49	6.50	48,500	2	Yes
8,000	\$48,000	\$6.00	50	7.50	52,200	2	Yes
8,500	\$51,000	\$6.00	51	7.50	55,900	2	Yes
9,000	\$54,000	\$6.00	53	8.50	59,500	2	Yes
9,500	\$57,000	\$6.00	54	8.50	63,200	2	Yes
10,000	\$60,000	\$5.00	55	9.00	66,800	3	Yes
10,500	\$62,500	\$5.00	55	9.09	67,800	3	Yes
11,000	\$65,000	\$5.00	55	9.18	68,700	3	Yes
11,500	\$67,500	\$5.00	55	9.27	69,600	3	Yes
12,000	\$70,000	\$5.00	55	9.37	70,500	3	Yes
12,500	\$72,500	\$5.00	55	9.46	71,400	3	Yes
13,000	\$75,000	\$5.00	55	9.56	72,300	3	Yes
13,500	\$77,500	\$5.00	55	9.65	73,200	3	Yes
14,000	\$80,000	\$5.00	55	9.75	74,200	4	Yes
14,500	\$82,500	\$5.00	55	9.85	75,100	4	Yes
15,000	\$85,000	\$5.00	56	9.95	76,000	4	Yes
15,500	\$87,500	\$5.00	56	10.05	76,900	4	Yes
16,000	\$90,000	\$5.00	56	10.15	77,800	4	Yes
16,500	\$92,500	\$5.00	56	10.25	78,700	4	Yes
17,000	\$95,000	\$5.00	56	10.36	79,700	4	Yes
17,500	\$97,500	\$5.00	56	10.46	80,600	4	Yes
18,000	\$100,000	\$5.00	56	10.57	81,500	5	Yes

Population	Materials Expenditures ³	Materials Exp. / Capita ³ Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
18,500	\$102,500	\$5.00	56	10.67	82,400	5	Yes
19,000	\$105,000	\$5.00	56	10.78	83,300	5	Yes
19,500	\$107,500	\$5.00	56	10.89	84,200	5	Yes
20,000	\$110,000	\$5.00	57	11.00	85,100	5	Yes
20,500	\$112,500	\$5.00	57	11.11	86,100	5	Yes
21,000	\$115,000	\$5.00	57	11.22	87,000	5	Yes
21,500	\$117,500	\$5.00	57	11.34	87,900	5	Yes
22,000	\$120,000	\$5.00	57	11.45	88,800	6	Yes
22,500	\$122,500	\$5.00	57	11.56	89,700	6	Yes
23,000	\$125,000	\$5.00	57	11.68	90,600	6	Yes
23,500	\$127,500	\$5.00	57	11.80	91,500	6	Yes
24,000	\$130,000	\$5.00	57	11.92	92,500	6	Yes
24,500	\$132,500	\$5.00	57	12.04	93,400	6	Yes
25,000	\$135,000	\$5.00	58	12.16	94,300	6	Yes
25,500	\$137,500	\$5.00	58	12.28	95,000	6	Yes
26,000	\$140,000	\$5.00	58	12.39	95,800	7	Yes
26,500	\$142,500	\$5.00	58	12.51	96,500	7	Yes
27,000	\$145,000	\$5.00	58	12.63	97,200	7	Yes
27,500	\$147,500	\$5.00	58	12.75	98,000	7	Yes
28,000	\$150,000	\$5.00	58	12.87	98,700	7	Yes
28,500	\$152,500	\$5.00	58	12.99	99,400	7	Yes
29,000	\$155,000	\$5.00	58	13.11	100,200	7	Yes
29,500	\$157,500	\$5.00	58	13.24	100,900	7	Yes
30,000	\$160,000	\$5.00	59	13.37	101,600	8	Yes
30,500	\$162,500	\$5.00	59	13.49	102,300	8	Yes
31,000	\$165,000	\$5.00	59	13.62	103,100	8	Yes
31,500	\$167,500	\$5.00	59	13.75	103,800	8	Yes
32,000	\$170,000	\$5.00	59	13.88	104,500	8	Yes
32,500	\$172,500	\$5.00	59	14.01	105,300	8	Yes
33,000	\$175,000	\$5.00	59	14.15	106,000	8	Yes
33,500	\$177,500	\$5.00	59	14.28	106,700	8	Yes
34,000	\$180,000	\$5.00	59	14.42	107,500	9	Yes
34,500	\$182,500	\$5.00	59	14.55	108,200	9	Yes
35,000	\$185,000	\$5.00	60	14.69	108,900	9	Yes
35,500	\$187,500	\$5.00	60	14.83	109,700	9	Yes
36,000	\$190,000	\$5.00	60	14.97	110,400	9	Yes
36,500	\$192,500	\$5.00	60	15.11	111,100	9	Yes
37,000	\$195,000	\$5.00	60	15.26	111,900	9	Yes
37,500	\$197,500	\$5.00	60	15.40	112,600	9	Yes
38,000	\$200,000	\$5.00	60	15.55	113,300	10	Yes

Population	Materials Expenditures ³	Materials Exp. / Capita ³ Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
38,500	\$202,500	\$5.00	60	15.70	114,100	10	Yes
39,000	\$205,000	\$5.00	60	15.85	114,800	10	Yes
39,500	\$207,500	\$5.00	60	16.00	115,500	10	Yes
40,000	\$210,000	\$5.00	60	16.15	116,300	10	Yes
40,500	\$212,500	\$5.00	60	16.30	117,000	10	Yes
41,000	\$215,000	\$5.00	60	16.46	117,700	10	Yes
41,500	\$217,500	\$5.00	60	16.61	118,500	10	Yes
42,000	\$220,000	\$5.00	60	16.77	119,200	11	Yes
42,500	\$222,500	\$5.00	60	16.93	119,900	11	Yes
43,000	\$225,000	\$5.00	60	17.09	120,600	11	Yes
43,500	\$227,500	\$5.00	60	17.25	121,400	11	Yes
44,000	\$230,000	\$5.00	60	17.42	122,100	11	Yes
44,500	\$232,500	\$5.00	60	17.58	122,800	11	Yes
45,000	\$235,000	\$5.00	60	17.75	123,600	11	Yes
45,500	\$237,500	\$5.00	60	17.92	124,300	11	Yes
46,000	\$240,000	\$5.00	60	18.09	125,000	12	Yes
46,500	\$242,500	\$5.00	60	18.26	125,800	12	Yes
47,000	\$245,000	\$5.00	60	18.43	126,500	12	Yes
47,500	\$247,500	\$5.00	60	18.61	127,200	12	Yes
48,000	\$250,000	\$5.00	60	18.78	128,000	12	Yes
48,500	\$252,500	\$5.00	60	18.96	128,700	12	Yes
49,000	\$255,000	\$5.00	60	19.14	129,400	12	Yes
49,500	\$257,500	\$5.00	60	19.33	130,200	12	Yes
50,000	\$260,000	\$5.00	60	19.51	130,900	13	Yes
50,500	\$262,500	\$5.00	60	19.69	131,400	13	Yes
51,000	\$265,000	\$5.00	60	19.88	131,800	13	Yes
51,500	\$267,500	\$5.00	60	20.07	132,300	13	Yes
52,000	\$270,000	\$5.00	60	20.26	132,700	13	Yes
52,500	\$272,500	\$5.00	60	20.45	133,200	13	Yes
53,000	\$275,000	\$5.00	60	20.65	133,600	13	Yes
53,500	\$277,500	\$5.00	60	20.84	134,100	13	Yes
54,000	\$280,000	\$5.00	60	21.04	134,600	14	Yes
54,500	\$282,500	\$5.00	60	21.24	135,000	14	Yes
55,000	\$285,000	\$5.00	60	21.44	135,500	14	Yes
55,500	\$287,500	\$5.00	60	21.65	135,900	14	Yes
56,000	\$290,000	\$5.00	60	21.85	136,400	14	Yes
56,500	\$292,500	\$5.00	60	22.06	136,800	14	Yes
57,000	\$295,000	\$5.00	60	22.27	137,300	14	Yes
57,500	\$297,500	\$5.00	60	22.48	137,800	14	Yes
58,000	\$300,000	\$5.00	60	22.70	138,200	15	Yes

Population	Materials Expenditures ³	Materials Exp. / Capita ³ Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
58,500	\$302,500	\$5.00	60	22.91	138,700	15	Yes
59,000	\$305,000	\$5.00	60	23.13	139,100	15	Yes
59,500	\$307,500	\$5.00	60	23.35	139,600	15	Yes
60,000	\$310,000	\$5.00	60	23.57	140,000	15	Yes
60,500	\$312,500	\$5.00	60	23.79	140,500	15	Yes
61,000	\$315,000	\$5.00	60	24.02	141,000	15	Yes
61,500	\$317,500	\$5.00	60	24.25	141,400	15	Yes
62,000	\$320,000	\$5.00	60	24.48	141,900	16	Yes
62,500	\$322,500	\$5.00	60	24.71	142,300	16	Yes
63,000	\$325,000	\$5.00	60	24.95	142,800	16	Yes
63,500	\$327,500	\$5.00	60	25.18	143,200	16	Yes
64,000	\$330,000	\$5.00	60	25.42	143,700	16	Yes
64,500	\$332,500	\$5.00	60	25.66	144,200	16	Yes
65,000	\$335,000	\$5.00	60	25.91	144,600	16	Yes
65,500	\$337,500	\$5.00	60	26.15	145,100	16	Yes
66,000	\$340,000	\$5.00	60	26.40	145,500	17	Yes
66,500	\$342,500	\$5.00	60	26.65	146,000	17	Yes
67,000	\$345,000	\$5.00	60	26.91	146,400	17	Yes
67,500	\$347,500	\$5.00	60	27.16	146,900	17	Yes
68,000	\$350,000	\$5.00	60	27.42	147,400	17	Yes
68,500	\$352,500	\$5.00	60	27.68	147,800	17	Yes
69,000	\$355,000	\$5.00	60	27.94	148,300	17	Yes
69,500	\$357,500	\$5.00	60	28.21	148,700	17	Yes
70,000	\$360,000	\$5.00	60	28.48	149,200	18	Yes
70,500	\$362,500	\$5.00	60	28.75	149,700	18	Yes
71,000	\$365,000	\$5.00	60	29.02	150,100	18	Yes
71,500	\$367,500	\$5.00	60	29.30	150,600	18	Yes
72,000	\$370,000	\$5.00	60	29.57	151,000	18	Yes
72,500	\$372,500	\$5.00	60	29.85	151,500	18	Yes
73,000	\$375,000	\$5.00	60	30.14	151,900	18	Yes
73,500	\$377,500	\$5.00	60	30.42	152,400	18	Yes
74,000	\$380,000	\$5.00	60	30.71	152,900	19	Yes
74,500	\$382,500	\$5.00	60	31.01	153,300	19	Yes
75,000	\$385,000	\$5.00	60	31.30	153,800	19	Yes
75,500	\$387,500	\$5.00	60	31.60	154,200	19	Yes
76,000	\$390,000	\$5.00	60	31.90	154,700	19	Yes
76,500	\$392,500	\$5.00	60	32.20	155,100	19	Yes
77,000	\$395,000	\$5.00	60	32.51	155,600	19	Yes
77,500	\$397,500	\$5.00	60	32.82	156,100	19	Yes
78,000	\$400,000	\$5.00	60	33.13	156,500	20	Yes

Population	Materials Expenditures ³	Materials Exp. / Capita ³ Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
78,500	\$402,500	\$5.00	60	33.44	157,000	20	Yes
79,000	\$405,000	\$5.00	60	33.76	157,400	20	Yes
79,500	\$407,500	\$5.00	60	34.08	157,900	20	Yes
80,000	\$410,000	\$5.00	60	34.40	158,300	20	Yes

Note³: Materials Expenditure in Appendix C showcases the total expenditure Minimum at the exact population tiers shown. Materials Exp./Capita Rate shows that populations at and before 10,000 are at \$6/capita and once the population tier goes over 10,000, future population portions are at \$5/capita. To calculate actual Materials Expenditure/Capita for libraries with a population over 10,000 do the following:

$$((\text{Municipal population} - 10,000) \times \$5) + (10,000 \times \$6) / \text{Municipal Population} = \text{Materials Expenditure/Capita}$$

Appendix D

The purpose of these charts is to showcase the Minimums to Exempt for each Waukesha County Library in the first year of the plan (2027), which will use 2025 DOA population numbers (most recent number available by the time 2027 library budget planning occurs in mid-2026). Materials Expenditure/Capita calculation for populations over 10,000 (first 10,000 = \$6/capita, portion after 10,000 is \$5/capita).

New 2027 Minimums for Individual Libraries

Library	Big Bend	2025 Population: 1,490
Category		2027 Minimum To Exempt
\$ Materials/Capita		\$6.00/capita
Hours Open		35
FTE		1.75
Collection Size		11,900
Public Computers/Internet Access Devices		2
Wireless Internet Access		Yes

Library	Brookfield	2025 Population: 41,453
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$5.24/capita	
Hours Open	60	
FTE	16.46	
Collection Size	117,700	
Public Computers/Internet Access Devices	10	
Wireless Internet Access	Yes	

Library	Butler	2025 Population: 1,758
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$6.00/capita	
Hours Open	35	
FTE	1.75	
Collection Size	11,900	
Public Computers/Internet Access Devices	2	
Wireless Internet Access	Yes	

Library	Delafield	2025 Population: 7,240
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$6.00/capita	
Hours Open	48	
FTE	6.50	
Collection Size	44,900	
Public Computers/Internet Access Devices	2	
Wireless Internet Access	Yes	

Library	Eagle	2025 Population: 5,683
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$6.00/capita	
Hours Open	44	
FTE	4.50	
Collection Size	33,900	
Public Computers/Internet Access Devices	2	
Wireless Internet Access	Yes	

Library	Elm Grove	2025 Population: 6,498
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$6.00/capita	
Hours Open	45	
FTE	5.50	
Collection Size	37,600	
Public Computers/Internet Access Devices	2	
Wireless Internet Access	Yes	

Library	Hartland	2025 Population: 10,161
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$5.98/capita	
Hours Open	55	
FTE	9.0	
Collection Size	66,800	
Public Computers/Internet Access Devices	3	
Wireless Internet Access	Yes	

Library	Menomonee Falls	2025 Population: 40,945
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$5.24/capita	
Hours Open	60	
FTE	16.30	
Collection Size	117,000	
Public Computers/Internet Access Devices	10	
Wireless Internet Access	Yes	

Library	Merton	2025 Population: 8,293
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$6.00/capita	
Hours Open	50	
FTE	7.50	
Collection Size	52,200	
Public Computers/Internet Access Devices	2	
Wireless Internet Access	Yes	

Library	Mukwonago	2025 Population: 8,850
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$6.00/capita	
Hours Open	51	
FTE	7.50	
Collection Size	55,900	
Public Computers/Internet Access Devices	2	
Wireless Internet Access	Yes	

Library	Muskego	2025 Population: 25,688
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$5.39/capita	
Hours Open	58	
FTE	12.28	
Collection Size	95,000	
Public Computers/Internet Access Devices	6	
Wireless Internet Access	Yes	

Library	New Berlin	2025 Population: 40,044
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$5.25/capita	
Hours Open	60	
FTE	16.15	
Collection Size	116,300	
Public Computers/Internet Access Devices	10	
Wireless Internet Access	Yes	

Library	Oconomowoc	2025 Population: 20,179
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$5.50/capita	
Hours Open	57	
FTE	11.00	
Collection Size	85,100	
Public Computers/Internet Access Devices	5	
Wireless Internet Access	Yes	

Library	Pewaukee	2025 Population: 24,507
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$5.41/capita	
Hours Open	57	
FTE	12.04	
Collection Size	93,400	
Public Computers/Internet Access Devices	6	
Wireless Internet Access	Yes	

Library	Sussex	2025 Population: 12,413
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$5.81/capita	
Hours Open	55	
FTE	9.37	
Collection Size	70,500	
Public Computers/Internet Access Devices	3	
Wireless Internet Access	Yes	

Library	Waukesha	2025 Population: 71,390
Category	2027 Minimum To Exempt	
\$ Materials/Capita	\$5.14/capita	
Hours Open	60	
FTE	29.02	
Collection Size	150,100	
Public Computers/Internet Access Devices	18	
Wireless Internet Access	Yes	

Appendix E

Materials and Services Provided by Waukesha County Libraries					
	Books	Audiobooks	DVDs	Magazines	Newspapers
Big Bend	X	X	X	X	X
Brookfield	X	X	X	X	X
Butler	X	X	X	X	X
Delafield	X	X	X	X	X
Eagle	X	X	X	X	X
Elm Grove	X	X	X	X	X
Hartland	X	X	X	X	X
Menomonee Falls	X	X	X	X	X
Merton	X	X	X	X	X
Mukwonago	X	X	X	X	X
Muskego	X	X	X	X	X
New Berlin	X	X	X	X	X
Oconomowoc	X	X	X	X	X
Pewaukee	X	X	X	X	X
Sussex	X	X	X	X	X
Waukesha	X	X	X	X	X

	Music on CD	Large Print Materials	E-Books	E-Audiobooks	Streaming Video
Big Bend	X	X	X	X	
Brookfield	X	X	X	X	
Butler	X	X	X	X	
Delafield	X	X	X	X	
Eagle	X	X	X	X	
Elm Grove	X	X	X	X	X
Hartland	X	X	X	X	
Menomonee Falls	X	X	X	X	
Merton	X	X	X	X	
Mukwonago	X	X	X	X	
Muskego	X	X	X	X	
New Berlin	X	X	X	X	
Oconomowoc	X	X	X	X	X
Pewaukee	X	X	X	X	
Sussex	X	X	X	X	
Waukesha	X	X	X	X	X

Materials and Services Provided by Waukesha County Libraries

	Digital Magazines	Library of Things	Experience Passes	STEM Kits	Book Club Kits
Big Bend	X	X	X	X	
Brookfield	X	X	X	X	X
Butler	X	X	X	X	X
Delafield	X	X	X	X	
Eagle	X	X		X	X
Elm Grove	X	X	X		
Hartland	X	X	X	X	X
Menomonee Falls	X	X	X	X	X
Merton	X	X	X	X	
Mukwonago	X	X	X	X	X
Muskego	X		X	X	X
New Berlin	X	X	X	X	X
Oconomowoc	X	X	X	X	
Pewaukee	X	X	X		
Sussex	X	X	X		
Waukesha	X	X	X	X	X

	Wi-Fi Hotspots	Online Databases	Online Training Courses	Internet Access	Wi-Fi Access
Big Bend		X	X	X	X
Brookfield	X	X	X	X	X
Butler		X	X	X	X
Delafield	X	X	X	X	X
Eagle	X	X	X	X	X
Elm Grove		X	X	X	X
Hartland	X	X	X	X	X
Menomonee Falls	X	X	X	X	X
Merton	X	X	X	X	X
Mukwonago	X	X	X	X	X
Muskego	X	X	X	X	X
New Berlin	X	X	X	X	X
Oconomowoc	X	X	X	X	X
Pewaukee	X	X	X	X	X
Sussex	X	X	X	X	X
Waukesha	X	X	X	X	X

Materials and Services Provided by Waukesha County Libraries

	Outdoor Wi-Fi	Technology Assistance	Devices for Checkout	Public Copier (BW)	Public Copier (Color)
Big Bend	x	x	x	x	x
Brookfield		x		x	
Butler	x	x		x	x
Delafield	x	x	x	x	x
Eagle		x		x	x
Elm Grove		x		x	x
Hartland	x	x		x	x
Menomonee Falls	x	x		x	x
Merton		x		x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin		x	x	x	x
Oconomowoc	x	x		x	x
Pewaukee	x		x	x	x
Sussex	x	x	x	x	x
Waukesha	x		x	x	x

	Wireless Printing	Faxing Service	Public Scanner	Microfilm/Fiche Reader	Meeting Room(s)
Big Bend					
Brookfield	x		x	x	x
Butler			x		x
Delafield			x		
Eagle	x	x	x		
Elm Grove	x	x	x		x
Hartland	x	x	x	x	x
Menomonee Falls	x	x	x	x	x
Merton		x			x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin			x	x	x
Oconomowoc	x		x	x	x
Pewaukee	x		x		x
Sussex	x	x	x		x
Waukesha	x	x	x	x	x

Materials and Services Provided by Waukesha County Libraries

	After-5pm Meeting Space	Tables/ Seating	Early Literacy Play Area	Art Gallery or Wall	Outdoor Space
Big Bend		x			
Brookfield	x	x	x	x	x
Butler	x	x	x		x
Delafield		x	x	x	x
Eagle		x	x		
Elm Grove	x	x	x		
Hartland	x	x	x		x
Menomonee Falls	x	x	x	x	
Merton		x	x	x	x
Mukwonago	x	x	x		x
Muskego	x	x	x		x
New Berlin	x	x	x	x	x
Oconomowoc	x	x	x		
Pewaukee	x	x	x		
Sussex	x	x	x		x
Waukesha	x	x	x		

	Makerspace	3D- Printer	Handicapped Accessible Building	Warming/ Cooling Shelter	Local History Resources	Curbside Services
Big Bend					x	
Brookfield			x	x	x	
Butler			x	x	x	
Delafield			x	x	x	
Eagle		x	x	x	x	x
Elm Grove			x	x	x	
Hartland			x	x	x	
Menomonee Falls	x	x	x		x	x
Merton	x	x	x	x	x	
Mukwonago	x	x	x	x	x	
Muskego			x	x	x	x
New Berlin	x		x	x	x	x
Oconomowoc			x	x	x	x
Pewaukee			x		x	x
Sussex			x	x	x	
Waukesha	x	x	x	x	x	

Materials and Services Provided by Waukesha County Libraries

	Outreach Services	Programs for Adults	Program for Children	Programs for Teens	Summer Library Program
Big Bend		X	X	X	X
Brookfield	X	X	X	X	X
Butler	X	X	X	X	X
Delafield	X	X	X	X	X
Eagle	X	X	X	X	X
Elm Grove		X	X	X	X
Hartland	X	X	X	X	X
Menomonee Falls	X	X	X	X	X
Merton	X	X	X	X	X
Mukwonago	X	X	X	X	X
Muskego	X	X	X	X	X
New Berlin	X	X	X	X	X
Oconomowoc	X	X	X	X	X
Pewaukee	X	X	X	X	X
Sussex	X	X	X	X	X
Waukesha	X	X	X	X	X

	Online Programs	Interlibrary Loan Service	Exam Proctoring	Reference Services	Readers Advisory Services
Big Bend		X		X	X
Brookfield	X	X	X	X	X
Butler		X		X	X
Delafield		X	X	X	X
Eagle	X	X	X	X	X
Elm Grove		X	X	X	X
Hartland		X		X	X
Menomonee Falls	X	X	X	X	X
Merton		X		X	X
Mukwonago		X		X	X
Muskego		X	X	X	X
New Berlin	X	X		X	X
Oconomowoc		X	X	X	X
Pewaukee		X		X	X
Sussex		X	X	X	X
Waukesha		X	X	X	X

Materials and Services Provided by Waukesha County Libraries

	Income Tax Forms	Site Host Tax Preparation	Low Vision Reader	Hearing Loop	Digitized Local History	Charging Stations
Big Bend				x		x
Brookfield	x	x		x	x	x
Butler	x		x	x		x
Delafield			x	x		x
Eagle	x		x			x
Elm Grove	x			x		x
Hartland	x			x		x
Menomonee Falls	x			x	x	x
Merton						x
Mukwonago	x	x		x		x
Muskego	x	x	x	x		x
New Berlin	x	x	x	x		x
Oconomowoc	x		x	x	x	x
Pewaukee	x			x		x
Sussex	x		x	x	x	x
Waukesha	x	x	x	x		x

	Job Search Info and Assistance	Coffee	Home Delivery	Friends Library Group	Trained Staff
Big Bend		x			x
Brookfield	x		x	x	x
Butler	x	x		x	x
Delafield	x		x	x	x
Eagle		x	x	x	x
Elm Grove			x	x	x
Hartland	x	x	x	x	x
Menomonee Falls	x	x	x	x	x
Merton	x			x	x
Mukwonago	x		x	x	x
Muskego	x			x	x
New Berlin	x	x	x	x	x
Oconomowoc	x		x	x	x
Pewaukee				x	x
Sussex	x	x	x	x	x
Waukesha		x	x	x	x

Materials and Services Provided by Waukesha County Libraries

	Group or 1:1 Tech Training	Social Media Presence	Self- Checkout	Library Website	Newsletter
Big Bend		x		x	
Brookfield	x	x	x	x	x
Butler	x	x		x	x
Delafield	x	x	x	x	x
Eagle	x	x		x	x
Elm Grove	x			x	x
Hartland	x	x		x	x
Menomonee Falls	x	x	x	x	x
Merton	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
Oconomowoc	x	x	x	x	x
Pewaukee		x	x	x	x
Sussex	x	x	x	x	x
Waukesha		x	x	x	x

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Appendix F

Glossary of Terms: Library Materials and Services

Art Gallery or Wall

Public exhibition space to display artwork, often created and/or provided by local artists.

Book Club Kits

Curated collections of books that patrons can check out in order to host their own book clubs. Multiple copies of each book are available in each kit, often with discussion questions.

Charging Stations

Freestanding powering devices that can be used to charge phones, laptops, and mobile devices.

Curbside Service

Library patrons may place a hold on library materials to pick up at a library. When the materials are ready, the patron is able to arrange to have them brought out to their vehicle or placed outside for easy pickup.

Devices for Checkout

Technical devices available for checkout. Examples include laptops, GPS devices, tablets, and e-readers.

Experience/Explore Passes

Offer free admission for individuals or groups to local and regional attractions such as museums or the zoo.

Group or 1:1 Tech Training

Formal library staff-led group classes or one-on-one sessions with a library staff member and a patron providing information and hands-on practice to improve patron skill level with technical devices such as tablets and computers; computer software such as Microsoft Word; and Internet use, such as social media and online searching.

Hearing Loop

An Assistive Listening System that transfers sound- from a microphone or TV- directly to a hearing device or cochlear implant, via a tiny telecoil (t-coil) receiver, allowing those with hearing issues to hear and participate in library programs and interactions with staff and presenters. Hearing loops are available in library meeting rooms and/or customer help desks at designated libraries.

Home Delivery

Delivery of library materials to individual homes, as well as senior living facilities and nursing homes.

Makerspace/3D Printer

Creative gathering space with tools and equipment so patrons can engage in creative projects. Makerspaces may include 3D printers, sewing machines, video recording equipment, scrapbooking materials, robotics, and coding software.

Library of Things

A collection of objects available for checkout. Possible items include tools, recreational equipment, toys, games, science kits, or musical instruments.

Online Databases

Online access to collections of information on a variety of topics. Examples include AncestryLibrary, Consumer Reports, and Morningstar Investment Research Center. Accessible to library patrons within and outside the library.

Online Training Courses

Instructor-led, self-paced, online classes through the Gale Udemy database. Courses offer learning opportunities for professional development, technology skills, and personal enrichment. Accessible to library patrons within and outside the library.

Outdoor Space

Accessible outdoor areas, such as gardens, courtyards, and/or outdoor seating, for patron use and library programming.

Outreach Services

Engaging with the community through library programming, collections, and services outside of the library. Examples include attending community events such as farmer's markets and festivals; presenting at meetings of local organizations; and bringing programming to schools and senior living facilities.

STEM Kits

Curated kits that can be checked out that promote Science, Technology, Engineering, and Math (STEM) through access to STEM-based tools and activities.

Warming/cooling shelter

Official, county-designated safe spaces where the public can stay to warm up or cool down during inclement weather. Waukesha County Emergency Management directs and refers people to these sites during weather emergencies.

Wi-Fi Hotspots

Portable wireless access points providing network and/or Internet access to mobile devices. Available for checkout to provide patrons with wireless access if it is otherwise unavailable.

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Appendix G

Waukesha County Library Board Profile and County Funding %

Library	Total Board Members	County Appointments (from Total)	% of 2024 Budget That Was Home County Funding
Big Bend	7	2	32.59%
Brookfield	9	0	8.07%
Butler	7	0	13.84%
Delafield	11	4	43.9%
Eagle	7	0	7.27%
Elm Grove	7	0	7.08%
Hartland	8	3	39.14%
Menomonee Falls	7	0	1.58%
Merton	8	0	14.04%
Mukwonago	11	4	38.62%
Muskego	9	0	6.19%
New Berlin	9	0	1.07%
Oconomowoc	9	2	26.27%
Pewaukee	7	0	8.23%
Sussex	11	4	40.38%
Waukesha	11	2	25.95%

Appendix H

The formula to calculate the unit cost for the distribution formula is found in Wisconsin Statutes 43.12(3)b. This final calculation gets multiplied by the total TNR circulation for the Act 150 minimum distribution required for each library. Numbers below are the most recent available for this example and meant to model the calculation.

2024 Unit Cost Data for 2026 Distribution Formula

Library	Expenditures (minus federal dollars)	÷	Total Circulation (Physical and Electronic)	=	Unit Cost per Circ (X70% Act 150 Adjustment)
Big Bend	\$90,845	÷	20,436	=	\$3.11
Brookfield	\$3,406,653	÷	631,703	=	\$3.77
Butler	\$127,535	÷	32,856	=	\$2.72
Delafield	\$967,337	÷	247,641	=	\$2.73
Eagle	\$320,636	÷	49,054	=	\$4.58
Elm Grove	\$643,133	÷	111,659	=	\$4.03
Hartland	\$756,263	÷	251,443	=	\$2.11
Menomonee Falls	\$2,385,975	÷	450,001	=	\$3.71
Merton	\$688,241	÷	80,567	=	\$5.98
Mukwonago	\$1,314,418	÷	289,308	=	\$3.18
Muskego	\$1,457,548	÷	297,925	=	\$3.42
New Berlin	\$1,822,034	÷	436,986	=	\$2.92
Oconomowoc	\$1,299,527	÷	374,615	=	\$2.43
Pewaukee	\$1,390,751	÷	312,799	=	\$3.11
Sussex	\$1,358,862	÷	398,106	=	\$2.39
Waukesha	\$4,618,716	÷	987,956	=	\$3.27

**BECAUSE
STRONG
LIBRARIES
BUILD
STRONG
COMMUNITIES.**



Waukesha County Library Services Plan Minimums			
Population:	40,451	40,044	
	2022-2025	2026-2031	Proposed Change
<i>Materials/Capita</i>	10K, \$6.25, \$5.25	10K, \$6.00, \$5.00	4%
<i>Library Materials</i>	220,700	210,000	5%
<i>Hours Open</i>	60	60	N/A
<i>FTE</i>	17.94	16.15	10%
<i>Collection Size</i>	127,000	116,300	8%
<i>Public Computing</i>	21 stations	10	50%
<i>Wireless Access</i>	Required	Required	N/A

Current Formula vs Proposed Formula

Lib.	2025 Distribution	2026 Total		Change from 2025		Change from Current Formula
		Current Formula	Proposed Formula	Current Formula	Proposed Formula	
BB	\$33,087	\$37,116	\$39,148	\$4,029	\$6,061	\$2,032
BR	\$293,341	\$300,145	\$296,758	\$6,804	\$3,417	(\$3,387)
BU	\$23,460	\$30,825	\$32,625	\$7,365	\$9,165	\$1,800
DE	\$463,587	\$507,397	\$562,874	\$43,810	\$99,287	\$55,477
EA	\$25,109	\$23,854	\$25,401	(\$1,255)	\$292	\$1,547
EG	\$48,061	\$49,341	\$48,621	\$1,280	\$560	(\$720)
HL	\$327,587	\$361,229	\$338,236	\$33,642	\$10,649	(\$22,993)
MF	\$38,969	\$44,880	\$44,880	\$5,911	\$5,911	\$0
MK	\$553,918	\$599,848	\$629,639	\$45,930	\$75,721	\$29,791
MS	\$105,976	\$122,219	\$111,159	\$16,243	\$5,183	(\$11,060)
NB	\$19,490	\$22,252	\$22,252	\$2,762	\$2,762	\$0
NL	\$111,357	\$118,016	\$117,187	\$6,659	\$5,830	(\$829)
OW	\$369,590	\$401,157	\$408,830	\$31,567	\$39,240	\$7,673
PK	\$110,349	\$129,179	\$134,088	\$18,830	\$23,739	\$4,909
SX	\$628,271	\$685,686	\$655,121	\$57,415	\$26,850	(\$30,565)
WK	\$1,234,140	\$1,282,191	\$1,248,516	\$48,051	\$14,376	(\$33,675)
TOTAL	\$4,386,292	\$4,715,335	\$4,715,335	\$329,043	\$329,043	\$0

Alternative B Distribution Formula for 2026

Lib.	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
	Act 150 State \$ Amt. Minimum (a)	2025 Actual Lib. Tax Levy Distribution (Prior Yr)	Allowable Cost Increase	Prior Year Distribution Plus Increase to Allowable Costs	Preliminary Distribution (Greater of Column A and Column D)	Eligible for Decrease (if necessary)	% of F	Distribution of Deficit (if necessary)	Net COB/ TNR / ILL	Only Positive Net COB/ TNR/ILL (a)(b)	% of Column K	Proportion of Excess Revenue (B27 X Column L)	Act 150 State \$ Amt. Minimum (a)	Unadjusted Distribution Level (L + M)	Remaining Amt to get to Unadjusted Distribution Level	% of L	Distributing Surplus/(Deficit)	Final Distribution	Increase over 2025 (\$)	Increase over 2025 (%)
BB	\$30,660	\$33,087	\$385	\$33,472	\$33,472	\$0	0.00%	\$0	8,929	8,929	0.8%	\$15,393	+	\$30,660 = \$46,053	\$12,581	2.23%	\$5,676	\$39,148	\$6,061	18.32%
BR	\$164,857	\$293,341	\$3,417	\$296,758	\$296,758	\$0	0.00%	\$0	44,378	44,378	4.2%	\$76,504	+	\$164,857 = \$241,361	(\$55,397)	-17.86%	\$0	\$296,758	\$3,417	1.16%
BU	\$3,315	\$23,460	\$273	\$23,733	\$23,733	\$0	0.00%	\$0	23,277	23,277	2.2%	\$40,128	+	\$3,315 = \$43,443	\$19,710	3.49%	\$8,892	\$32,625	\$9,165	39.07%
DE	\$425,560	\$463,587	\$5,400	\$468,987	\$468,987	\$0	0.00%	\$0	145,905	145,905	13.9%	\$251,529	+	\$425,560 = \$677,089	\$208,102	36.82%	\$93,887	\$562,874	\$99,287	21.42%
EA	\$23,724	\$25,109	\$292	\$25,401	\$25,401	\$0	0.00%	\$0	(997)				+	\$23,724 = \$23,724	(\$1,678)	-0.54%	\$0	\$25,401	\$292	1.16%
EG	\$5,124	\$48,061	\$560	\$48,621	\$48,621	\$0	0.00%	\$0	13,847	13,847	1.3%	\$23,871	+	\$5,124 = \$28,995	(\$19,625)	-6.33%	\$0	\$48,621	\$560	1.17%
HL	\$160,915	\$327,587	\$3,816	\$331,403	\$331,403	\$0	0.00%	\$0	107,681	107,681	10.2%	\$185,634	+	\$160,915 = \$346,549	\$15,146	2.68%	\$6,833	\$338,236	\$10,649	3.25%
MF	\$44,880	\$38,969	\$454	\$39,423	\$44,880	\$0	0.00%	\$0	(56,750)				+	\$44,880 = \$44,880	\$0	0.00%	\$0	\$44,880	\$5,911	15.17%
MK	\$448,638	\$553,918	\$6,452	\$560,370	\$560,370	\$0	0.00%	\$0	153,875	153,875	14.6%	\$265,268	+	\$448,638 = \$713,906	\$153,536	27.17%	\$69,269	\$629,639	\$75,721	13.67%
MS	\$43,096	\$105,976	\$1,234	\$107,210	\$107,210	\$0	0.00%	\$0	42,268	42,268	4.0%	\$72,867	+	\$43,096 = \$115,963	\$8,752	1.55%	\$3,949	\$111,159	\$5,183	4.89%
NB	\$22,252	\$19,490	\$227	\$19,717	\$22,252	\$0	0.00%	\$0	(6,570)				+	\$22,252 = \$22,252	\$0	0.00%	\$0	\$22,252	\$2,762	14.17%
NL	\$111,946	\$111,357	\$1,297	\$112,654	\$112,654	\$0	0.00%	\$0	6,238	6,238	0.6%	\$10,754	+	\$111,946 = \$122,700	\$10,046	1.78%	\$4,532	\$117,187	\$5,830	5.24%
OW	\$279,147	\$369,590	\$4,305	\$373,895	\$373,895	\$0	0.00%	\$0	99,878	99,878	9.5%	\$172,182	+	\$279,147 = \$451,329	\$77,434	13.70%	\$34,935	\$408,830	\$39,240	10.62%
PK	\$126,627	\$110,349	\$1,285	\$111,634	\$126,627	\$0	0.00%	\$0	9,592	9,592	0.9%	\$16,536	+	\$126,627 = \$143,163	\$16,536	2.93%	\$7,460	\$134,088	\$23,739	21.51%
SX	\$339,174	\$628,271	\$7,318	\$635,589	\$635,589	\$0	0.00%	\$0	197,055	197,055	18.7%	\$339,707	+	\$339,174 = \$678,881	\$43,291	7.66%	\$19,531	\$655,121	\$26,850	4.27%
WK	\$671,213	\$1,234,140	\$14,376	\$1,248,516	\$1,248,516	\$0	0.00%	\$0	199,450	199,450	19.0%	\$343,836	+	\$671,213 = \$1,015,049	(\$233,467)	-75.27%	\$0	\$1,248,516	\$14,376	1.16%
TOTAL	\$2,901,127	\$4,386,292	\$51,094	\$4,437,386	\$4,460,371	\$0		\$0	988,056	1,052,373	100.0%	\$1,814,209	+	\$2,901,127 = \$4,715,336	\$254,965		\$254,964	\$4,715,335	\$329,043	

Variance: \$0

Increase/(Decrease) in Allowable Costs 1.16%

Sum of Over \$ 565,133
Sum of (Under) \$ 310,168

\$4,715,335 Library Tax Levy \$2,901,127 Act 150 Minimum \$1,814,208 Excess Revenue Available	\$4,715,335 Library Tax Levy \$4,460,371 Preliminary Distribution \$254,964 Surplus/(Deficit) Revenue
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Waukesha County Library Services Plan 2022-2026



Approved by the
Waukesha County Board of Supervisors

April 12, 2022

Revision Note: On August 20, 2025, updates were applied to repair broken links on pages 20 and 24 of this document.

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Waukesha County Library Planning Committee

Committee Members

Jim Batzko (Waukesha County Board)

Dave DeAngelis (Village of Elm Grove, local official) ***Chair of the County Library Planning Committee**

Betsy Felix (Library Trustee, Delafield Public Library)

Joel Gaughan (Waukesha County Board)

Bruce Gay (Library Director, Waukesha Public Library)

Laura Gest (Library Director, Hartland Public Library)

Adele Loria (Library Director, Pauline Haass/Sussex Public Library)

Robyn Ludtke (Library Trustee, Hartland Public Library)

Dale Noll (Library Trustee, Pewaukee Public Library)

Howard Pringle (Trustee, Mukwonago Community Library and Bridges Library System)

Stephanie Ramirez (Library Director, Delafield Public Library)

Edell Schaefer (Library Director, Brookfield Public Library)

Nancy Wilhelm (Trustee, Alice Baker (Eagle) and Bridges Library System)

Advisory Participants

Karol Kennedy, Bridges Library System Director

Alex Klosterman, Waukesha County Senior Financial Analyst

Mellanie Mercier, Bridges Library System Assistant Director/Automation Coordinator

Executive Summary

The Waukesha County Library Planning Committee recommends the following five-year plan that will encourage public libraries in the county to seek the path of excellence in serving their patrons. Libraries are continually adapting to change and reinventing themselves for the benefit of their communities. The success of that constant transformation is evident in the continued high use of libraries in this county.

While the libraries in Waukesha County are all fully autonomous and governed by local library boards, they benefit greatly by their collaborative efforts such as the CAFÉ automation consortium. The citizens receive the benefit of strong, locally supported libraries without the undue burden that exists when one institution has the sole responsibility of providing all services and materials to meet its own community's needs. The vast body of information that exists in today's world is difficult to comprehend but libraries working cooperatively can leverage their resources and offer important access to their citizens. Libraries must work together to efficiently and effectively tackle the challenges they face resulting from limited funding and the changing landscape of technology.

While the public library was conceived in an age of information scarcity, today's networked world is one of information abundance and mobility. The spread of powerful digital information and communication technologies has touched every aspect of daily life, creating new opportunities. The Internet has become the critical gateway for accessing information, job opportunities, education, financial and government services, healthcare resources, and civic participation. But this new world of "information plenty" creates the need for new essential skills. Access to digital networks and digital literacy skills are essential for full participation in modern society. Economic, educational, civic, and social opportunities are tied to a whole new set of knowledge and skills that barely existed a generation ago, and people without these skills or access to this information abundance are quickly left behind. Public libraries can be at the center of these changes: a trusted community resource and an essential platform for learning, creativity, and innovation in the community. Public libraries have the DNA needed to thrive in this new information-rich, knowledge-based society. Providing access and connecting knowledge to the needs of individuals and the community have always been at the center of the mission and purpose of libraries. The emerging value proposition of the public library is built around three key assets - people, place and platform. ¹

The mission of Waukesha County government is to promote the health, safety and quality of life of citizens while fostering an economically vibrant community. The county is committed to delivering effective, high-quality programs and services in a courteous and fiscally prudent manner. Waukesha County recognizes that strong local libraries are essential to the quality of life for its citizens and help build strong, vibrant communities.

This county library planning process considered the past, analyzed the current environment, and then looked forward in order to identify the key strategic library issues of the next five years. This plan recommends the following:

- ❖ An update of the *Minimum to Exempt* standards to reflect the current Waukesha County library environment.
- ❖ The addition of a new quality assurance standard to help ensure libraries' excellence.
- ❖ A change in the definition of circulation in the county library funding collection and distribution formulas to more fairly reimburse libraries for service to residents living in municipalities without libraries.

¹*Rising to the Challenge: Re-Envisioning Public Libraries.* The Aspen Institute, 2014.

Introduction

Chapter 43 of the Wisconsin Statutes establishes the state’s policy regarding public libraries. Because Chapter 43 outlines certain responsibilities for counties in relation to library services, it is important to note that the statute emphasizes:

- ❖ The importance of providing all of Wisconsin residents free access to knowledge, information, and diversity of ideas;
- ❖ The critical role played by public, school, special, and academic libraries in providing that access;
- ❖ The major educational, cultural, and economic asset that is represented in the collective knowledge and information resources at the libraries in Wisconsin; and
- ❖ The most efficient and effective management of Wisconsin’s library resources occurs through resource sharing and collaboration.

Vision

Strong Libraries Build Strong Communities.

Waukesha County citizens are served by a vibrant system of well-managed, accessible, and connected libraries that are essential to building strong communities.

Mission Statement and Core Values

Waukesha County supports and strengthens high quality library services to its citizens through strong local libraries that offer a return on investment for taxpayers. All libraries are committed to operating with these core values:

- ❖ *Excellence*
- ❖ *Customer service*
- ❖ *Fiscal responsibility*
- ❖ *Collaboration*
- ❖ *Integrity*
- ❖ *Innovation*
- ❖ *Community Engagement*
- ❖ *Connectivity*
- ❖ *Inclusion*

Statutory Requirements

Chapter 43.11 specifically addresses the requirements for county library planning. While library service plans can address any appropriate issues, Wisconsin Statutes Section 43.11 requires that counties address at least the following in their county library plan:

- ❖ How public library service will be provided to residents of those municipalities in the county not maintaining a public library (locally referred to as **True Non-Residents** or **TNR**);
- ❖ The method and level of funding that will be provided by the county in order to implement services described in the plan, including the reimbursement of municipal libraries for providing library service to in-county and adjacent county residents; and
- ❖ A method for allocating membership on the regional library system board between the counties in the regional library system.

A county library planning committee was appointed by Paul Decker, Chair of the Waukesha County Board, in the summer of 2021 to develop a new county library plan. A public hearing was held to seek input on this plan and was presented to and approved by the Waukesha County Board of Supervisors on April 12, 2022. This plan supersedes the *Waukesha County Library Service Plan: 2017-2021*.

Planning History

Five county library plans have been approved in Waukesha County since the adoption of the 1998 Act 150 that changed Wisconsin library law requiring county library planning.

2001-2003 Plan

County Board Chair James Dwyer appointed the first Act 150 Committee, chaired by Karen McNelly. It met from September 1999 to March 2000. The committee made 15 recommendations. The main recommendations were:

- Retain the current federated status of the library system;
- Adopt a formula for collecting funds by a special county levy on the residents of the 19 communities without their own libraries;
- Adopt a formula for distribution of this funding to 16 county libraries;
- Adopt standards for library services;
- Study a shared automation system for county libraries; and
- Create a capital costs study committee.

The County Executive vetoed the standards provision, but the standards were re-introduced with a modification and passed by the County Board in 2001, for 2002 budget purposes.

2004-2006 Plan

County Board Chair James Dwyer appointed the second Act 150 Committee, chaired by Ken Herro. It met from September 2002 to March 2003. The committee made 15 recommendations. The main recommendations were:

- Retain the current federated status of the library system;
- Freeze the standards implementation schedule while state tax caps are in place. Lacking the freeze, the standards would have risen to the 90% level but were frozen at the 85%;
- Require any proposed new library to demonstrate that it can and will meet the standards established for Waukesha County before it is eligible for exemption from the county library levy;
- Retain the “Best Fit” formula for distributing to libraries the funds that are collected by a special county levy on the residents of the communities without their own libraries;
- Create a shared automation system for county libraries; and
- Create a capital costs study committee.

In August of 2003, the County Board approved a Capital Cost Study Committee. The County Board approved the capital costs proposal, but County Executive Finley vetoed it and the County Board sustained the veto.

2007-2011 Plan

County Board Chair James Dwyer appointed the third Act 150 Committee, chaired by Paul Kanter. It met from September 2005 to March 2006. The committee made 15 recommendations. The main recommendations were:

- Continue the standards implementation freeze;
- Establish a committee to review the formula for distribution of funds to county libraries;
- Encourage the CAFÉ Council to evaluate the effectiveness of the CAFÉ shared automation system and share the results with the WCFLS (Waukesha County Federated Library System) Board;

- Encourage the strengthening and improving of one automation system shared by all libraries in the county; and
- Defer consideration of WCFLS' organizational form, local autonomy statement and library establishment until after the final result of the Library Governance Options report.

The committee reconvened in the fall of 2006 for consideration of these issues after the conclusion of the Library Governance Options Study. Major recommendations were:

- Remain a federated library system;
- Reaffirm local library autonomy;
- Establish a capital cost reimbursement program as included in the Act 150 report; and
- Adopt a provision for payments to libraries in adjacent counties as required in newly enacted state law 43.12(2), also known as Act 420.

In August of 2007, the County Board approved the resulting Capital Costs proposal, but County Executive Vrakas vetoed it and the County Board sustained the veto.

2008 - County Library Funding Committee

The County Board adopted the *Waukesha County Library Services Plan (2007-2011)* in June of 2006. It called for a re-examination of the then-current "Best-Fit" funding distribution formula in ordinance (11-4) that had been in place since 2000. The plan recommended that the County Board appoint a committee, chaired by County Supervisor Bill Mitchell. The Committee met from January 2008 to April 2008. The committee considered nine options, and its recommendations were:

- Implement a new formula for funding year 2009. The County Board agreed and passed an ordinance to this effect in June of 2008; and
- Appoint a new committee in three years to review the formula again for 2012 funding.

2012-2014 Plan

County Board Chair James Dwyer appointed the fourth Act 150 Committee, chaired by Richard Brandt. It met from March to June of 2011. The main recommendations of the committee were:

- Conduct at least two local library-planning efforts each year of the plan;
- Annually produce reports on member library services based on Wisconsin Library Service Record data that indicate the performance of libraries;
- Publicize successes through the media and continue to apply for awards;
- Remain a federated library system;
- Continue to use the adopted funding formula set forth in the ordinance;
- Continue to use the standards at 85% of the basic level on the voluntary standards published by the State of Wisconsin in the year 2000;
- Continue to offer the Library Service Effort ratio targets unchanged;
- Require that any new library demonstrate that it can and will meet standards before it is eligible for exemption from the county library levy; and
- Reaffirm local autonomy with library system oversight on library system compliance.

2017-2021 Plan

County Board Chair Paul Decker appointed the fifth Act 150 Committee, chaired by Dave DeAngelis. It met from August 2016 to March 2017. The main recommendations of the committee were:

- Update the standards to reflect the current Waukesha County library environment and include requirements based on a graduated population scale;
- Add new quality assurance standards to help ensure libraries' excellence;
- Change standards language to emphasize that the county library standards are "minimums to exempt" rather than aspirational;
- Change in the library distribution formula to more accurately credit libraries for sharing their materials; and
- Remove outdated language in the county code's library distribution formula in order to acknowledge the statutory authority vested in the regional library system board.

County Profile

Understanding the trends in the population of Waukesha County provides the background for planning. The 2020 Census and 2019 estimates showed the following in Waukesha County:

- Approximately 406,978 people reside in Waukesha County, making it the third most populated county in the state.
- Waukesha County population projections indicate an increase by .41% annually
- The median age is 43.2 years old.
- The median age will continue to increase, reflecting the aging of “baby-boomers” coupled with the smaller number of people born in the late 1960s and early 1970s.
- There are an estimated 158,808 households--72% of them are family households with a married couple.
- Approximately 9.6% of the population is disabled.
- Almost 12% of the population in the county are minorities.
- Median household income is the highest of any county in the state.
- The poverty rate is 5% of county residents.

County Library Services Profile

There are sixteen public libraries in the county (Figure 1.) providing library services (shown in Appendix D) to residents of Waukesha County. A resident may visit any of these public libraries to seek information, materials, and services. The sixteen libraries are located throughout Waukesha County.

Figure 1. Waukesha County Libraries



1. Big Bend Village Library	2. Brookfield Public Library	3. Butler Public Library	4. Delafield Public Library
5. Alice Baker Memorial Library (Eagle)	6. Elm Grove Public Library	7. Hartland Public Library	8. Menomonee Falls Public Library
9. Mukwonago Community Library	10. Muskego Public Library	11. New Berlin Public Library	12. Town Hall Public Library (North Lake)
13. Oconomowoc Public Library	14. Pewaukee Public Library	15. Pauline Haass Public Library (Sussex)	16. Waukesha Public Library

All Waukesha County residents who live in municipalities without libraries have access to the same services as residents of municipalities with libraries, as a condition of those libraries' membership in the regional public library system.

The municipal [libraries](#) were created under the authority of Section 43.52 of the Wisconsin Statutes by their respective municipalities and are governed by duly appointed library boards. The Pewaukee Public Library is a joint library between the Village and City of Pewaukee. The Alice Baker Library is a joint library between the Town and Village of Eagle. A single municipality operates each of the other libraries in Waukesha County. All public library boards must include the local school district superintendent, or their designee, as a member. In addition, one member of the municipal governing body may be appointed to the library board, and up to two members may be non-residents of the municipality.

Waukesha County does not own/operate a public library. Instead, through its annual budget process, it reimburses existing libraries for providing services to residents of those municipalities that do not have libraries of their own. The county has authority to appoint members to local municipal library boards in proportion to their level of funding as set forth in Section 43.60 of Wisconsin Statutes. Waukesha County does take advantage of making appointments when allowed by statute to ensure that it has a voice on a local library board it is helping fund. For example, of the 11 trustees of the Pauline Haass Public Library in Sussex, four are Waukesha County appointees.

Regional Public Library Systems

Regional public library systems operate according to Wis. Stats. 43.13 - 43.24 and have been in place in Wisconsin since 1971. The goal of library systems is to provide all Wisconsin residents with access to high-quality library service needed to meet personal, work, educational, and community goals. The actual organization and development of public library systems in Wisconsin was a voluntary and gradual process. No county or public library is required to be a member of a library system, yet all of Wisconsin's 72 counties and 381 public libraries are library system members. The creation of public library systems fostered the establishment of a strong network of resource sharing and mutually beneficial interdependence among community public libraries. Wisconsin's 16 public library systems developed in distinct ways in response to the needs of their member libraries and area residents. They continue to evolve and respond as changes in society, resources, and technology create new demands and opportunities, including in Waukesha County.

The Waukesha County Federated Library System (WCFLS) was formed in 1981 and operated as a single county library system until 2016. On January 1, 2016, Waukesha and Jefferson Counties joined to form the Bridges Library System. Citizens can learn more about the project, which won two prestigious awards from the Public Policy Forum, here: <http://tinyurl.com/bridgesaward>. The award for data-driven management or decision-making highlights the thoughtfulness behind the decision to join the two counties. The project

included analysis of the following: overall cost/benefit, fiscal impact, impact on libraries, staff impact, office space capacity, delivery capacity and needs, governance changes, board member allocation, operational changes, contracts review, geographic considerations, CAFÉ operations and migration project implementation, wide area network changes and implementation, name change, and website change. The award for intergovernmental cooperation underscores the importance of working together to become stronger and the concept that to be truly successful all partners must realize added value and meaningful benefits.

Currently, regional library system services include management of the shared automation system (CAFÉ), database management, materials delivery service, professional development opportunities and resources, consulting services, inclusive services, youth services, technology support services, marketing services, website hosting, cooperative purchasing, provision of digital and online resources, provision of backup reference services, and wide area network management.

A statewide Public Library System Redesign (PLSR) project was launched in fall of 2015. The project was led by a 10-member Steering Committee appointed by the State Superintendent of the Department of Public Instruction (DPI). The committee represented the regional and service level diversity of Wisconsin Libraries, from small rural public library systems to large urban public libraries. The committee was formed to oversee a process created and endorsed by the Council on Library and Network Development (COLAND) and accepted by the Superintendent to consider how to best provide public library system services in Wisconsin.

The statewide PLSR Project was completed in 2018 and the final report of the PLSR Steering Committee was delivered to the State Superintendent's Office on March 8, 2019, summarizing three-and-a-half years of work by the Steering Committee, workgroups, and sub-committees. DPI staff within the Division for Libraries and Technology have been charged with implementing the recommendations of the Steering Committee and COLAND is actively monitoring the progress of the implementation process. The work of DPI staff will be guided by the information, data, and feedback gathered from the library community.

The goal of PLSR is to develop a plan for implementation of new equitable, efficient, and effective models of service to provide the best service possible for all public libraries and library users. An initial implementation strategy was released to the library community in fall of 2019 that was prioritized by support expressed during public listening sessions conducted in the Spring of 2019. In June 2020, in light of the COVID-19 pandemic and the resulting impact on libraries and library systems, DPI staff worked in partnership with the 16 Public Library System Directors to reprioritize implementation activities.

The PLSR Steering Committee Recommendations include:

- Develop Standards, Best Practices, and Accountability Structures for Public Library Systems
- Enhance Collaboration by Creating Incentives and Removing Barriers
- Reduce the Number of Public Library Systems

- Analyze the Current Funding Formula
- Initiate Delivery Service Pilot Projects
- Create an Effective, Well Managed, State-Scale Discovery Layer
- Implement a Learning Management System for Professional Development

Planning Process

County Board Chairman Paul Decker appointed a 13-member committee to undertake this most recent Waukesha County library planning effort. The committee met from July 2021 until February 2022. Seven meetings were held during this planning process. Library input was solicited and received throughout the process.

A public hearing was held on February 17, 2022, to receive public input on the plan prior to approval by the Act 150 County Library Planning Committee.

This plan contains recommended revisions to the county's mandatory library *Minimum to Exempt* standards for exemption to the county library tax. Mandatory standards take effect if they are approved by the County Board of Supervisors and the public library boards of at least 50% of the participating municipalities in the county that contain, according to the most recent estimate prepared under Wisconsin state statute 16.96, at least 80% of the population of participating municipalities in the county.

Key Strategic Issues

1. Excellence
2. Type of Organization
3. County Funding Collection Formula
4. County Funding Distribution Formula
5. Required Standards: Minimums to Exempt from the County Library Tax
6. Library Establishment
7. Relationships with Others
8. CAFÉ Shared Automation System
9. Regional Library System Membership and Services

Strategic Issue #1. Excellence

Waukesha County seeks to lead the way in terms of levels and types of library services as measured by state and national data. Analyzing how Waukesha County compares to other similar counties is important because it provides valuable context that takes into consideration what is happening in library services from a high-level perspective.

Historic metrics are in the process of change. State and national data reporting agencies have begun to collect additional data that can be used to measure service delivery in the changing library landscape. In Wisconsin, digital content is owned collectively statewide with public libraries and library systems financing access through license purchases. While digital collections (and their usage) are being counted, all participating members own the digital collections. This shared ownership complicates a traditional analysis of a library collection because numbers no longer reflect single libraries. For example, the Big Bend Village Library reported on its state annual report that it owns 156,430 e-books through Overdrive, as does the Waukesha Public Library because both libraries have access to the Wisconsin Digital Library. In a state without a shared buying pool, the number of e-books owned by any given library would likely be a much smaller number.

Comparing service measures data of counties within the state with similar service populations helps to identify how the libraries in Waukesha are performing. Historically, the 16 libraries in Waukesha County have outranked many of their state peers on important library performance measures based on state library data. Figure 4 provides Waukesha County information and rankings compared to those of the 13 most populous counties in Wisconsin, using the most recent data available and comparing it to data from 2015, which was used in the last county library plan five years ago.

As seen in Figure 4, on all measures but two, Waukesha County has either stayed at the same rank or improved its state ranking. The two measures where Waukesha County libraries experienced a decrease in ranking were expenditure/circulation and per capita \$ - County. The expenditure per circulation is moving in a positive direction as libraries have become more efficient. Waukesha's per capita \$ - County increased by 0.1% while the other counties average decreased by 0.1% resulting in a ranking shift from 2 to 3. E-content circulation per capita was not included in the previous plan but has been added as a service measure.

It is important to note that while Waukesha County libraries consistently lead the way based on statewide benchmarks, there has been a decrease in five of the nine historical performance benchmarks. However, the percentage of change is small, and some decreases correspond to a shift in the way libraries are used.

Please note the following definitions:

- ❖ **FTE** stands for Full-Time Equivalent Employees indicated in library staffing levels.
- ❖ **Circulation** refers to the number of physical items checked out of libraries as opposed to items downloaded through library-sponsored websites unless listed as e-content circulation.
- ❖ **Visits** to libraries are recorded by attendance at the libraries, often by door counters.

Figure 4: Wisconsin Data for Comparable County Populations – 2019 Data

Service Measure	Waukesha Co. Actual 2019	Avg. Annual Change in 4 years	Other Counties Avg. in 2019	Avg. Annual Change 4 years - in other counties	Waukesha Co. Current Rank of Counties	Waukesha Co. Rank of Counties 4 Years Ago
Per Capita \$ - Local	\$47.36	0.9%	\$39.62	0.7%	3	4
Per Capita \$ - County	\$38.78	0.1%	\$31.16	-0.1%	3	2
Per Capita \$ - Combined	\$45.45	0.8%	\$40.39	0.9%	3	3
Circulation per visit	2.2	0.0%	1.77	-3.8%	4	5
Circulation per capita	11.6	0.0%	8.12	-2.8%	2	4
Reference questions/capita	0.81	-1.8%	0.62	-1.5%	2	2
Materials expenditures/capita	\$5.57	-0.5%	4.13	-1.0%	2	2
Circulation per open hour	95.87	0.3%	71.77	-2.1%	2	3
Visits/capita	5.2	-0.2%	4.57	-0.5%	3	4
FTE per 1000 population	0.58	-0.3%	0.53	0.7%	3	5
Expenditure/circulation	\$4.15	0.8%	5.8	5.8%	11	8
Public Internet Computers per 1,000 pop	0.98	-0.8%	0.97	0.7%	6	6
E-content circulation per capita	1.25	11.1%	1.04	11.2%	3	4

*12 Comparison Counties: Brown, Dane, Kenosha, La Crosse, Marathon, Milwaukee, Outagamie, Racine, Rock, Sheboygan, Washington, and Winnebago

Because a high quality of life for the citizens of Waukesha County cannot be achieved without excellent libraries, it is important that libraries be measured against performance metrics. Excellence is a moving target, and the measurements will need to change in the future because of the vast changes in our information systems and society. Work is being done on a national level to devise additional outcome measures to better reflect libraries' changing role in society.

Goals and Action Steps for Strategic Issue #1 - Excellence

Goal: Produce reports that indicate performance of Waukesha County libraries using traditional and new metrics.

Objective: The library system staff, in cooperation with the county library directors, will establish new performance measures that include digital services and any other metric(s) that quantify current library service programs.

Objective: The library system staff will annually provide a report to each library that compares its library to comparable libraries.

Objective: The library system staff will annually provide to the regional library system board a report on the performance of the Waukesha County libraries in aggregate.

Objective: The library system staff will annually provide a snapshot of key performance indicators in the Waukesha County library budget request.

Strategic Issue #2. Type of Organization

In 2005, the library system hired a consulting firm to take a comprehensive look at the type of organization for the delivery of library services in Waukesha County to ascertain whether a move from a federated to a consolidated structure was advisable. The recommendation of the report was that the existing county library structure continue. The existing structure is that autonomous municipal libraries come together under the umbrella of the library system to work together to achieve efficiencies and strength of collaboration thereby improving effectiveness for all libraries and improving library services for all the citizens of Waukesha County. Even though the study was completed in 2005 and libraries have fundamentally changed in that time, the underlying concepts that were examined have changed little. The most significant changes are as follows:

- ❖ There are now only two joint libraries in the county.
- ❖ The district library legislation under discussion at the time of the study has not been enacted and shows no signs of being re-introduced.
- ❖ The library system has become a two-county regional library system.
- ❖ All county libraries are now a part of the CAFÉ automation consortium.

The current county library planning committee discussed the type of organization and confirmed that remaining in a federated library system arrangement is desirable. The option to change to a consolidated county library was discussed and is not recommended for the reasons cited in the previous study. The committee recommends that the statutorily required county library planning be completed by a county library planning committee as has been done in the past. Creating another layer of government by forming a county library service, such as exists in Dane County, is not recommended as long as the current regional library system conditions remain. The option to utilize the services of the regional library system in county library planning, budgeting, compliance, and development was considered the best way to maximize efficiencies and build on expertise and relationships already in place.

Goals and Objectives for Strategic Issue #2 - Type of Organization

Goal: Continue to utilize the services of the regional library system to assist with county library planning, budgeting, compliance and development throughout the plan.

Objective: The regional library system staff will monitor implementation of the statewide Public Library System Redesign (PLSR) project recommendations and continue to provide feedback to DPI and COLAND expressing the need to provide a high level of county library services to avoid creating a need for an additional organization to handle county library responsibilities in the future.

Objective: If the regional library system's ability to provide effective services for the county and libraries changes, as determined by the library system board or the member libraries, a county library planning committee will be convened to study and plan for county-level services to benefit the county and the libraries.

Strategic Issue #3. County Funding Collection Formula

Like all Wisconsin library budgets, Waukesha County municipal library budgets are built on a patchwork of funding sources. County funding is a significant source of funding to libraries that, as required by state law, serve a large number of residents living in municipalities without libraries. Act 150 introduced a requirement in state statute that sets forth a minimum rate at which counties must tax communities without their own libraries for their residents' library use. Waukesha County ordinance 11-4 sets requirements beyond the minimum required in state law. The ordinance can be found at the following link:
<https://www.waukeshacounty.gov/media/xeciqcw/chapter-11-federated-library-system.pdf#page=3>

The county library tax allows for exemption by library communities, if the community's tax for its library appropriation meets or exceeds the county library tax mill rate from the prior year or, in the case of a joint library, must not be less than the average of the previous three years. The community's library must also meet or exceed the adopted county library standards authorized by state statute and codified as enrolled Waukesha County Ordinance 11-6. All municipalities with libraries have annually exempted themselves from the county library tax.

The county library planning committee reviewed the current county library collection formula as defined in Ordinance 11-4 and recommends this formula continue to be used. The amount to be collected from residents of Waukesha County municipalities without their own libraries through the County Library tax is determined by multiplying the total amount of circulation to non-library community residents (TNR) as a percentage of total countywide circulation (Figure

5.) by the total allowable operating expenditures of all county libraries (Figure 6.) as shown in Figure 7.

Historically, only the circulation of physical materials has been used in this calculation. However, in recent years the circulation of electronic materials has grown significantly. From 2019 to 2020, there was an increase in digital usage in the county of 18.9%. These circulations are accurately measured by place of residence, as are physical circulations. The TNR proportionate use of electronic materials is historically higher than TNR proportionate use for physical materials. In 2020, the TNR proportion for physical materials was 18.629%, while the proportion for electronic materials was 22.124%.

The committee recommends the circulation of both physical and electronic materials be included in the collection formula. By including both forms of circulation, the ratio of library use by residents of non-library and library municipalities can be most accurately measured and will provide a more equitable reimbursement for library services.

Figure 7 shows the impact this change would have had on the 2022 in-county budget request.

Figure 5. True Non-Resident (TNR) Usage of Libraries in Waukesha County (2020 data) Physical Materials Only

Library	Circulation to Waukesha County TNR		Total County Circulation		TNR Ratio
Big Bend	6,138	÷	12,786		48.01%
Brookfield	30,551	÷	501,073		6.10%
Butler	264	÷	25,125		1.05%
Delafield	79,107	÷	133,200		59.39%
Eagle	3,518	÷	27,192		12.94%
Elm Grove	573	÷	70,196		0.82%
Hartland	48,313	÷	163,341		29.58%
Menomonee Falls	5,405	÷	219,760		2.46%
Mukwonago	97,671	÷	185,814		52.56%
Muskego	8,257	÷	162,991		5.07%
New Berlin	5,631	÷	284,785		1.98%
North Lake	8,124	÷	39,183		20.73%
Oconomowoc	64,433	÷	189,607		33.98%
Pewaukee	22,189	÷	209,397		10.60%
Sussex	86,102	÷	243,242		35.40%
Waukesha	92,969	÷	534,379		17.40%

Figure 6. County Library Allowable Operating Costs 2021 for 2022 Budget

Library	Allowable Costs for 2021
Big Bend	\$74,567
Brookfield	\$3,040,182
Butler	\$107,962
Delafield	\$804,903
Eagle	\$256,895
Elm Grove	\$542,018
Hartland	\$679,570
Menomonee Falls	\$1,990,227
Mukwonago	\$984,750
Muskego	\$1,359,077
New Berlin	\$1,566,639
North Lake	\$458,408
Oconomowoc	\$1,228,428
Pewaukee	\$1,201,725
Sussex	\$1,161,099
Waukesha	\$4,293,738
Total Allowable Costs	\$19,750,188

Figure 7. Collection Formula for 2022 Budget

Collection Formula	TNR%	x	Allowable Costs	=	In-County Budget Request
Countywide Totals (Physical Materials Only)	18.629%	x	\$19,750,188	=	\$3,679,191
Countywide Totals (Physical and Electronic Materials)	19.182%	x	\$19,750,188	=	\$3,788,564

As in past years, the county library planning committee’s review of the collection formula included discussion of the capital investments municipalities make in libraries and that there is no provision in the county library collection formula to offset any of the capital expenditures. The history of the county funding formula and previous significant efforts to include a capital component in the formula were discussed. The committee does not recommend change to the current collection formula, other than the inclusion of the circulation of electronic materials but does acknowledge that the municipalities are making additional investments well beyond the operating costs to ensure that quality library facilities are available for use by all county

residents. This is especially true for those municipalities in Figure 5 with high TNR ratios, because their facilities must be sized to accommodate that use.

In addition to using county libraries, some Waukesha County residents use out-of-county libraries. Most citizens choose to use libraries that are convenient to their home, workplace, or school, irrespective of geographic/tax boundaries. Sometimes that library is across a county line. Wisconsin Act 420 was enacted in 2005 and became Wis. Stats. 43.12 that requires reimbursements across county lines. This law allows libraries to invoice an adjacent county when residents of a non-library community in that county borrow items from libraries across county borders. This provision is known as “cross-county payments” or “inter-county funding.” Libraries receive reimbursements based solely on the number of physical items checked out to the non-library community residents. Libraries must be paid at a rate of 70% of their operating costs based on circulation.

The Waukesha County library planning committee strongly supports inter-county payments at this level or higher as a fair and efficient way to extend library services across county lines. It is far less expensive to reimburse an existing library than to build and operate a new library. Several libraries in Waukesha County are situated in close proximity to one or more borders and provide significant services to citizens who live in areas without libraries in adjacent counties. Waukesha County libraries receive funding from those adjacent counties that is, in some cases, vital to their ongoing operations.

In 2021, the Waukesha County budget amount for inter-county funding was \$28,115. That amount was added to the county library budget request in accordance with Wis. Stats. 43.12, and paid to libraries in adjacent counties. By way of comparison, Waukesha County libraries received \$509,650 (in 2021) in funding from adjacent counties. As a result, it is in the interest of Waukesha County to vigorously protect this funding.

Goals and Objectives for Strategic Issue #3 - County Funding Collection Formula

Goal: Continue to collect data and make budget requests based on the formula set forth in Ordinance 11-4, state law, and pre-existing contracts.

Objective: The regional library system staff will annually review and verify all adjacent county library requests and incorporate reimbursements to non-county libraries into the county library budget request.

Objective: The regional library system staff will annually review a contract with Lakeshores Library System that compensates Waukesha County libraries for inter-county usage and incorporate both revenues and expenditures in the county library budget as well as seek the approval of the contract from the regional library system board.

Objective: The regional library system staff will annually review all library allowable costs information and circulation data and prepare county library budget request based on certified data. Beginning with the 2023 budget request, circulation of both physical and electronic materials will be included in the collection formula calculation.

Objective: The regional library system will annually prepare the municipal exemption notices and certification for compliance and report to the county the municipalities that qualify for the exemption from the county library tax.

Goal: Support the continuance of inter-county payments in Wisconsin.

Objective: The regional library system staff will monitor, inform stakeholders, and be proactively engaged in legislative efforts to ensure that inter-county payments to libraries continue at the same level or be increased.

Strategic Issue #4. County Funding Distribution Formula

The county library planning committee discussed in detail the formula prescribed in Waukesha County Ordinance 11-8 as shown in Appendix A. The details of the formula may be found here: <https://www.waukeshacounty.gov/media/xeciqcw/chapter-11-federated-library-system.pdf#page=6>

Wis. Stats. 43.12 requires that the county set the method and level of county library service funding, which must include reimbursement to public libraries for services to county residents of municipalities that do not maintain a public library. In Waukesha County, this is referred to as *True Non-Resident (TNR) borrowing*. According to the statute, each library must receive a reimbursement of at least 70% of the local unit cost for its TNR circulations.

TNR borrowing is distinguished from *Crossover Borrowing*, which refers to residents of a library community going to another community's library. The circulation adjustments in the current formula allow for net crossover lenders to be partially rewarded and for net crossover borrowing libraries to have their circulation amounts partially reduced to compensate the net lenders.

In the formula, a library is given credit for sharing its materials with other libraries. Sharing allows libraries to achieve local savings and reduces unnecessary duplication. To discourage libraries from relying too heavily on other libraries by not purchasing enough to meet local demand and to compensate libraries which build strong collections that are borrowed by residents of other library communities, interlibrary loan traffic is measured and factored into the distribution formula. How much a library sends versus how much the library borrows is netted and included as an element in the formula.

In the 2017-2021 Plan, an administrative change was made to the distribution formula. Instead of measuring the number of items transferred from one library to another (transits), the actual number of circulations of inter-library loan items within Waukesha County is the data element used. Because the automation system offers enough detailed reporting on the number of uses and ownership of materials at each library, this data can be recorded and used to more accurately measure a library's efforts to share with its partner libraries. Detailed information that showed the use of each library's materials for 2016 was analyzed and it was determined that this change offered the most accurate reflection of the data that gives credit to libraries that collect and share their materials.

To provide stability in funding, there is a safety net built into the formula that prevents any library from a decrease greater than 5% or \$5,000 (whichever is less), based on the change from the prior year levy distribution unless there is a funding shortfall as described in section 11-8 (5). The county library planning committee discussed the stability component in the formula and agreed it was important to retain. The libraries find it valuable to have a safety net that provides funding stability.

Just as the committee recommends the circulation of both physical and electronic materials be included in the county collection formula, this is also the recommendation for the distribution formula. By including both forms of circulation, the library use by residents of non-library municipalities can be most accurately measured and funds distributed based on use.

Goals and Objectives for Strategic Issue #4 – County Funding Distribution Formula

Goal: Continue to fund the libraries in accordance with the statute and the county ordinance 11-8.

Objective: The regional library system will compile the data for the previous year's inter-library loan circulation data. Beginning with the 2023 budget request, circulation of both physical and electronic materials will be included in the distribution formula calculation.

Strategic Issue #5. Standards

The first Act 150 Committee recommended in 2000 that the county establish standards for libraries based on the state library standards. The purposes were to ensure that all county residents had access to at least a basic level of library service and, by doing so, to diminish the level of crossover borrowing (use by residents of one community at another community's library). In 2001, the Waukesha County Board adopted changes to Chapter 11 of the County Code of Ordinances based on the recommendations of the Act 150 Committee. The library standards in place since 2001 reflected a rate of 85% of the basic level of the state numbers on

the following four standards: staffing level, hours of service, collection size, and materials expenditures.

In addition to the standards adopted, a Library Service Effort Ratio (LSER) was approved and is described in Section 11-5 of the County Code. The LSER allows libraries an alternative method of meeting requirements. A library community that does not meet its numerical standards can still claim exemption from the county library levy if it meets the LSER. The LSER is calculated by adding the number of item loans by a library to its own residents to the number of item loans to residents of other library communities and then dividing that sum by the total number of items borrowed by the residents of that municipality at all libraries in the county. The LSER allows library communities to retain exemption from the county library levy if their residents do most of their library business at home. According to the county plan, if most of a library's residents, most of the time, do most of their library business locally, the numerical standards will not apply. This is because residents will not be imposing any undue burden on neighboring libraries.

- ❖ A ratio below 100% indicates that the community's residents are borrowing materials from libraries other than their own and is referred to as a net borrowing community.
- ❖ A ratio over 100% indicates that the library is lending to other community's residents in addition to their own residents and is referred to as a net lending community.

Figure 8. LSER Library Data from 2020

	A	B		C		D	E	F
Library	Resident use of All Libraries	Library Lending to Other Library Community Residents		Resident Use of Own Library		Total Lending to Own Residents and Other Community Residents	Library Service Effort Ratio (Column D Divided by A)	Target Rate
Big Bend	9,111	1,122	+	5,526	=	6,648	72.97%	80%
Brookfield	445,766	74,190	+	396,332	=	470,522	105.55%	95%
Butler	12,369	14,300	+	10,561	=	24,861	200.99%	80%
Delafield	51,008	14,892	+	39,201	=	54,093	106.05%	80%
Eagle	31,756	1,925	+	21,749	=	23,674	74.55%	80%
Elm Grove	61,573	22,698	+	46,925	=	69,623	113.07%	80%
Hartland	85,718	40,624	+	74,404	=	115,028	134.19%	80%
Menomonee Falls	268,599	8,083	+	206,272	=	214,355	79.80%	95%
Mukwonago	75,568	16,035	+	72,108	=	88,143	116.64%	80%
Muskego	149,565	13,477	+	141,257	=	154,734	103.46%	90%
New Berlin	284,565	26,895	+	252,259	=	279,154	98.10%	95%
North Lake	55,347	3,546	+	27,513	=	31,059	56.12%	80%
Oconomowoc	128,355	11,173	+	114,001	=	125,174	97.52%	90%
Pewaukee	199,813	35,817	+	151,391	=	187,208	93.69%	90%
Sussex	111,386	53,663	+	103,477	=	157,140	141.08%	90%
Waukesha	472,327	39,896	+	401,514	=	441,410	93.45%	95%

Because larger libraries are assumed to be better able to address the needs of their own residents, population based LSER targets were developed. The population categories and target ratios are indicated in Figure 9.

Figure 9. LSER Target Ratios

Population	Target Ratio
Under 10,000	80%
10,000 to 29,999	90%
30,000 and over	95%

The 2021 county library planning committee recommends that the LSER option for exemption be maintained without change.

In 2016, the county library planning committee focused a great deal of its attention on county library standards. Because the library standards had not been updated in nearly twenty years and because the plan vision was to build strong communities through strong libraries, the committee decided to recommend updating the standards as a part of the plan. A subcommittee was formed to investigate the details and report back to the committee. Libraries had changed profoundly, and the sub-committee was charged with the task of offering relevant standards with a sliding population scale instead of a target for a population range. The sub-committee held two lengthy meetings and brought back information to the Act 150 County Library Planning Committee for consideration.

The sub-committee recommended that the word “*Standards*” be changed to the phrase “*Minimums to Exempt*” whenever possible to reflect the fact that recommended levels are not aspirational in nature; they should be considered minimums. While the statute describes the benchmarks as *standards* in 43.11 (3) (d), in the county library plan and in conversation within Waukesha County they are better described as *Minimums to Exempt* from the county library tax as allowed in Wis. Stats. 43.64 (2m).

The *Minimums to Exempt* are based on population of the library municipality, rather than by service area population, since the library’s municipality is the primary source of funding for libraries under the federated governance structure. Figure 10 lists the current population for each municipality.

Figure 10. Population of Waukesha County Library Municipalities, 2020 Census data.

Library Municipality	Population of Municipality
Big Bend	1,483
Brookfield	41,464
Butler	1,787
Delafield	7,185
Eagle	5,690
Elm Grove	6,513
Hartland	9,501
Menomonee Falls	38,527
Mukwonago	8,262
Muskego	25,032
New Berlin	40,451
North Lake	8,469
Oconomowoc	18,203
Pewaukee	24,152
Sussex	11,487
Waukesha	71,158

After thorough review, the 2016 county library planning committee recommended a complete revision of the county library standards. The proposed *Minimums to Exempt* were no longer tied to the state library standards benchmarks. While the state was in the process of a major revision of the standards, the county library committee did not wish to wait for the state standards to be completed. Therefore, new benchmarks were proposed based on an analysis of actual Waukesha County-specific data based on discussions with county public librarians and citizen input. The committee recommended the adoption of new numerical minimums, the addition of two new measures, and the inclusion of checklist items for the purpose of quality assurance. Finally, the committee recommended that the LSER option for exemption be maintained without change.

The 2021 County Library Planning Committee carefully reviewed the *Minimums to Exempt* established in 2017. The recommendation is to retain each of the numerical standards, but with some adjustments based on inflationary increases in the cost of library materials, changes in community technology needs, and increased demand for electronic material. Additional quality assurance standards are also recommended by the committee. Details of all *Minimums to Exempt* and *Quality Assurance Standards* are included below.

The *Minimums to Exempt* for each factor based on a sliding population scale are shown in full in Appendix B. Each library's actuals vs. the proposed *Minimums to Exempt* are shown in Appendix C.

Materials Expenditures Per Capita

Expenditures on library materials, and the size of libraries' physical collections have continued to change as a result of the growth in the size of digital collections. Yet, despite the trend toward digital, libraries still have a significant demand for physical materials. In fact, physical circulation represents an average of 86% of circulation countywide. Libraries are expected to use their annual materials budget to build a relevant current collection that is reflective of and responsive to their local community. The materials expenditures per capita *Minimum to Exempt* measure is intended to ensure libraries meet the current needs of the community by requiring libraries annually invest a minimum funding level for the purchase of materials, including electronic materials, as determined by materials expenditures based on the size of the municipal population.

The recommended minimum benchmarks for materials expenditures per capita were thoroughly reviewed in the context of local budgets and funding constraints and inflationary increases since the previous plan was developed. In the previous plan, the first 10,000 of the population was calculated at the \$6.00 per capita amount and the decreased rate of \$5.00 per capita was calculated on the portion of the population over 10,000.

After, much discussion, the committee recommends that a change of \$0.25 per capita be phased in gradually in 2023 and 2024:

- 2022 – No change in per capita expenditure requirement.
- 2023 – Increase per capita expenditure for first 10,000 population to \$6.15 and portion of population above 10,000 to \$5.15.
- 2024 - Increase per capita expenditure for first 10,000 population to \$6.25 and portion of population above 10,000 to \$5.25.

The materials per capita Minimums to Exempt based on municipal population are shown in Figure 11. Individual library requirements are shown in Appendix C.

Figure 11. Materials Per Capita Minimums to Exempt

Population	Expenditures /Capita 2022	Materials Expenditures 2022	Expenditures /Capita 2023	Materials Expenditures 2023	Expenditures /Capita 2024	Materials Expenditures 2024
1,000	\$6.00	\$6,000	\$6.15	\$6,150	\$6.25	\$6,250
1,500	\$6.00	\$9,000	\$6.15	\$9,225	\$6.25	\$9,375
2,000	\$6.00	\$12,000	\$6.15	\$12,300	\$6.25	\$12,500
2,500	\$6.00	\$15,000	\$6.15	\$15,375	\$6.25	\$15,625
3,000	\$6.00	\$18,000	\$6.15	\$18,450	\$6.25	\$18,750
3,500	\$6.00	\$21,000	\$6.15	\$21,525	\$6.25	\$21,875
4,000	\$6.00	\$24,000	\$6.15	\$24,600	\$6.25	\$25,000
4,500	\$6.00	\$27,000	\$6.15	\$27,675	\$6.25	\$28,125
5,000	\$6.00	\$30,000	\$6.15	\$30,750	\$6.25	\$31,250
5,500	\$6.00	\$33,000	\$6.15	\$33,825	\$6.25	\$34,375
6,000	\$6.00	\$36,000	\$6.15	\$36,900	\$6.25	\$37,500
6,500	\$6.00	\$39,000	\$6.15	\$39,975	\$6.25	\$40,625
7,000	\$6.00	\$42,000	\$6.15	\$43,050	\$6.25	\$43,750
7,500	\$6.00	\$45,000	\$6.15	\$46,125	\$6.25	\$46,875
8,000	\$6.00	\$48,000	\$6.15	\$49,200	\$6.25	\$50,000
8,500	\$6.00	\$51,000	\$6.15	\$52,275	\$6.25	\$53,125
9,000	\$6.00	\$54,000	\$6.15	\$55,350	\$6.25	\$56,250
9,500	\$6.00	\$57,000	\$6.15	\$58,425	\$6.25	\$59,375
10,000+	\$5.00	\$60,000	\$5.15	\$61,500	\$5.25	\$62,500

Hours Open

The number of hours a library is open per week is an important factor in the level of service it is able to provide to citizens. Some libraries have reduced hours over the summer months in response to changes in community needs. Therefore, the requirement for the minimum number of hours open is represented in average hours per week during the school year. The minimums for the number of open library hours per week based on population are shown in Figure 12. Individual library requirements are shown in Appendix C.

Figure 12: Winter Hours Open/Week Minimums

Population	Hours Open/Week
1,000	35
1,500	35
2,000	35
2,500	36
3,000	38
3,500	39
4,000	40
4,500	41
5,000	43
5,500	44
6,000	45
6,500	46
7,000	48
7,500	49
8,000	50
8,500	51
9,000	53
9,500	54
10,000+	55

Full Time Staff Equivalent (FTE)

Libraries are service-based institutions, which means having adequate staffing levels is a key input measure. For a library to effectively serve its community, the number of full-time equivalent (FTE) staff should be related to the size of the population. It should be noted that the *Minimums to Exempt* benchmark is based on the number of staff budgeted, not actual employees. This allows for unforeseen circumstances such as staff vacancies.

The FTE requirements are shown in Figure 13. The minimum number recommended is 2.0 FTE staff members regardless of the size of the library’s community population. Having enough staff to handle daily operations is considered key to a library’s success. The rate of the incremental increase is reduced at several population points as shown in Figure 13. An increase of 1.0 FTE is recommended for each 1,000 of population above 2,000. Economies of scale are achieved once a library reaches a certain size. Therefore, the incremental rate of increase is reduced after a population hits the 10,000 mark. At that point, the changes in staff required grow at a rate of approximately .10 per 500 population. Once a population hits the 25,000 mark, the rate of increase is further reduced. At that population point, the increases in staff required are reduced to a rate of .0095 per 500 population. The three change points are highlighted in yellow in Figure 13.

The complete population table is shown in Appendix B. Individual library requirements are shown in Appendix C.

Figure 13. FTE Staffing Levels Based on Population

Population	FTE Staffing Minimum Budget	Population	FTE Staffing Minimum Budget
1,000	2.00	12,500	10.51
2,000	2.00	13,000	10.62
3,000	3.00	13,500	10.73
4,000	4.00	14,000	10.84
5,000	5.00	14,500	10.94
6,000	6.00	15,000	11.05
7,000	7.00	15,500	11.17
8,000	8.00	16,000	11.28
9,000	9.00	16,500	11.39
10,000	10.00	17,000	11.51
10,500	10.10	17,500	11.62
11,000	10.20	18,000	11.74
11,500	10.31	18,500	11.86
12,000	10.41	19,000	11.98

Population	FTE Staffing Minimum Budget
19,500	12.10
20,000	12.22
20,500	12.34
21,000	12.47
21,500	12.59
22,000	12.75
22,500	12.85
23,000	12.98
23,500	13.11
24,000	13.24
24,500	13.38
25,000	13.51

Population	FTE Staffing Minimum Budget
25,500	13.64
26,000	13.77
26,500	13.90
27,000	14.03
27,500	14.16
28,000	14.30
28,500	14.44
29,000	14.57
29,500	14.71
30,000	14.85
30,500	14.99
31,000	15.13

Collection Size

This *Minimum to Exempt* only reflects the size of the library’s physical collection. While a library’s physical collection size continues to matter to citizens as a majority of patrons are still seeking physical materials, libraries continue to see an increase in the use of digital content. When the current plan was developed about 93% of circulation was physical materials. Based on year-to-date 2021 circulation statistics, it is estimated that 86% of total circulation will be physical materials, a change of 7%.

In the previous plan, the minimum collection size for a population of 2,500 or fewer was 14,000 items. The committee recommendation is to decrease this amount by 7.14% to 13,000, with the rest of the incremental changes remaining the same. At a population of 2,500 there is an incremental increase of 4,000 items per 500 population. At a population of 10,000, the incremental increase is reduced to 1,000 items per 500 population. At a population of 25,000 the increase is reduced to 800 items per 500 population. At a population of 50,000 the increase is reduced to 500 items per 500 population. The reduction in the base amount reduces the requirement for all libraries.

The change points are highlighted in Figure 14 below. Individual library requirements are shown in Appendix C.

Figure 14. Collection Size Based on Population

Population	Collection Size
1,000	13,000
1,500	13,000
2,000	13,000
2,500	13,000
3,000	17,000
3,500	21,000
4,000	25,000
4,500	29,000
5,000	33,000
5,500	37,000
6,000	41,000
6,500	45,000
7,000	49,000
7,500	53,000
8,000	57,000
8,500	61,000
9,000	65,000
9,500	69,000
10,000	73,000
10,500	74,000
11,000	75,000
11,500	76,000
12,000	77,000
12,500	78,000
13,000	79,000
13,500	80,000
14,000	81,000
14,500	82,000
15,000	83,000
15,500	84,000
16,000	85,000
16,500	86,000
17,000	87,000
17,500	88,000
18,000	89,000

Population	Collection Size
18,500	90,000
19,000	91,000
19,500	92,000
20,000	93,000
20,500	94,000
21,000	95,000
21,500	96,000
22,000	97,000
22,500	98,000
23,000	99,000
23,500	100,000
24,000	101,000
24,500	102,000
25,000	103,000
25,500	103,800
26,000	104,600
26,500	105,400
27,000	106,200
27,500	107,000
28,000	107,800
28,500	108,600
29,000	109,400
29,500	110,200
30,000	111,000
30,500	111,800
31,000	112,600
31,500	113,400
32,000	114,200
32,500	115,000
33,000	115,800
33,500	116,600
34,000	117,400
34,500	118,200
35,000	119,000
35,500	119,800

Population	Collection Size
36,000	120,600
36,500	121,400
37,000	122,200
37,500	123,000
38,000	123,800
38,500	124,600
39,000	125,400
39,500	126,200
40,000	127,000
40,500	127,800
41,000	128,600
41,500	129,400
42,000	130,200
42,500	131,000
43,000	131,800
43,500	132,600
44,000	133,400
44,500	134,200
45,000	135,000
45,500	135,800
46,000	136,600
46,500	137,400
47,000	138,200
47,500	139,000
48,000	139,800
48,500	140,600
49,000	141,400
49,500	142,200
50,000	143,000
50,500	143,500
51,000	144,000
51,500	144,500
52,000	145,000
52,500	145,500
53,000	146,000
53,500	146,500

Population	Collection Size
54,000	147,000
54,500	147,500
55,000	148,000
55,500	148,500
56,000	149,000
56,500	149,500
57,000	150,000
57,500	150,500
58,000	151,000
58,500	151,500
59,000	152,000
59,500	152,500
60,000	153,000
60,500	153,500
61,000	154,000
61,500	154,500
62,000	155,000
62,500	155,500
63,000	156,000
63,500	156,500
64,000	157,000
64,500	157,500
65,000	158,000
65,500	158,500
66,000	159,000
66,500	159,500
67,000	160,000
67,500	160,500
68,000	161,000
68,500	161,500
69,000	162,000
69,500	162,500
70,000	163,000
70,500	163,500
71,000	164,000

Number of Public Internet Computers

In today’s technologically driven world, the library is an important source of public internet connectivity in the county. Libraries bridge the digital divide in their communities. While more and more Waukesha County residents bring their own devices to libraries, it is important to recognize that not all residents have equal ability to afford to do so, and to remember the library’s role in equalizing access.

A minimum number of public access internet computers based on population is recommended, but libraries have seen some decrease in demand for these computers in recent years. All devices available to the public with internet access, such as computers, laptops, and tablets qualify in a library’s count. The minimum number of computers for any size population is 2. In the previous plan, an increase of one computer for every 1,000 people was required until a library community population reaches 10,000. At that population size, the requirement was reduced to one computer for every 2,000 people. The committee recommends the minimum number of 2 computers be retained, but an increase of one computer for every 2,000 people be required beyond the minimum. Figure 15 shows the minimum numbers of public internet computers based on population

The requirements for all population sizes are shown in Appendix B. Individual library requirements are shown in Appendix C.

Figure 15. Public Internet Computer Requirements.

Population	Computers/Internet Devices	Population	Computers/Internet Devices
1,000	2	7,000	4
1,500	2	7,500	4
2,000	2	8,000	5
2,500	2	8,500	5
3,000	2	9,000	5
3,500	2	9,500	5
4,000	3	10,000	6
4,500	3	10,500	6
5,000	3	11,000	6
5,500	3	11,500	6
6,000	4	12,000	7
6,500	4	12,500	7

Population	Computers/Internet Devices
13,000	7
13,500	7
14,000	8
14,500	8
15,000	8
15,500	8
16,000	9
16,500	9
17,000	9
17,500	9

Population	Computers/Internet Devices
18,000	10
18,500	10
19,000	10
19,500	10
20,000	11
20,500	11
21,000	11
21,500	11
22,000	12
22,500	12

Wireless Internet Access

Public wireless Internet access is extremely important for all libraries. Many people have their own devices and rely on libraries for their connection to the Internet. This *Minimum to Exempt* standard requires that county libraries of all size populations offer wireless Internet access as shown in Figure 16.

Figure 16. Wireless Access Requirement

Population	Wireless Access
≥1	Yes

Quality Assurance Standards

In addition to the numeric *Minimums to Exempt*, a series of *Quality Assurance Standards* are recommended. Because these items are relevant to a library serving any size population and do not include numeric benchmarks, they are proposed as checklist items. Each library board would have to respond “yes” to the requirement in order to meet the quality assurance standard. These *Quality Assurance Standards* are important because they help ensure that the libraries in the county will be well managed and accountable throughout the life of the plan.

The *Quality Assurance Standard* requiring the adoption or review of core library policies is new to the plan and recommended by the committee.

The recommended *Quality Assurance Standards* are:

- ❖ Library board members receive an orientation upon appointment to a library board.
- ❖ The library’s website includes contact information of key staff and board members as well as board agendas and minutes.
- ❖ The library board conducts an annual review of its library director.
- ❖ The library budget includes funding to ensure professional development for the library director and staff.
- ❖ The library has an active strategic plan.
- ❖ The library adopts the core policies included in the Wisconsin Public Library Tier One Standards: 1) Circulation, 2) Collection Management, 3) Computer/Internet Use, 4) Meeting Room Use (as necessary), and 5) Public Behavior (Rules of Conduct) 6) Personnel.

The recommended phase-in for implementation of the new core library policies *Quality Assurance Standard* is shown in Figure 17. Libraries that already have these policies in place would be expected to review each of these policies during the county library plan cycle.

Figure 17. Implementation Dates for Quality Assurance Items

Quality Assurance Item	Effective Date
Circulation Policy	September 30, 2022 for 2023 exemption
Collection Management Policy	September 30, 2022 for 2023 exemption
Computer/Internet Use Policy	September 30, 2023 for 2024 exemption
Meeting Room Use Policy (as necessary)	September 30, 2023 for 2024 exemption
Public Behavior (Rules of Conduct) Policy	September 30, 2023 for 2024 exemption
Personnel Policy	September 30, 2024 for 2025 exemption

Standards Implementation

The new policy *Quality Assurance Standards* would become effective according to the schedule in Figure 17. The materials expenditure per capita *Minimum to Exempt* would become effective as described in that section of the plan. All other *Minimums to Exempt* and *Quality Assurance*

Standards are being recommended to take effect immediately upon adoption by the county board of supervisors and the libraries as required in Wis. Stats. 43.11(3)(d).

The plan of library services for a county may include minimum standards of operation for public libraries in the county. The county shall hold a public hearing on any standards proposed under this paragraph. The standards shall take effect if they are approved by the county and the public library boards of at least 50 percent of the participating municipalities in the county that contain, according to the most recent estimate prepared under s. 16.96, at least 80 percent of the population of participating municipalities in the county.

Libraries would be allowed a one-time exception during the county library plan cycle for each of the standards items, the numeric *Minimums to Exempt*, as well as the checklist *Quality Assurance Standards*. In other words, in one year, a library could not meet the staffing level and the planning requirements and still qualify for the county library tax exemption. However, the library would need to meet both of those requirements for the remaining four years of the plan. The following year, the library could not meet its materials expenditures requirement and still qualify for the exemption because it had not used an exception on this item in a previous year.

If conditions exist, such as the worldwide pandemic in 2020, that result in all or most libraries being unable to meet a particular standard, libraries will still be able to claim the exemption even if the one-time exception had been used previously. Additionally, any library that meets its LSER ratio (as previously described) automatically qualifies for the county library tax exemption relative to the *Minimums to Exempt* component of the requirement. Standards requirements are in addition to the library's municipal requirement to meet or exceed the county library tax.

Below are the steps established to implement the county library tax exemption based on the requirement that a municipality meet the tax levy requirement as well as the adopted *Minimums to Exempt* for its municipal population or LSER qualification for its municipal population and meet the *Quality Assurance Standards* for all libraries.

- **February** - Libraries file state annual report indicating the necessary data for hours, staffing, materials collection size, materials spending, number of computers and wireless access for the previous year. Reports are due to the state by March 1.
- **May** – The regional library system distributes to each library a letter indicating the library's compliance with the *Minimums to Exempt* and LSER ratio based on the annual report of the previous year and the certification form approved by the library board that it intends to meet the *Minimums to Exempt* and the *Quality Assurance Standards* in the current year or provide a plan for return to compliance.
- **August** – Tax levy exemption information is distributed to libraries and municipalities in August. Exemption and standards compliance documentation is due by September 30 each year.

- **October** – The library system communicates to the county those municipalities that have met the requirements and are eligible to be exempt from the county library tax for the following year’s budget.
- **November** – Waukesha County Board of Supervisors sets the levy for the following budget year. The levy includes exemptions to the county library tax levy for communities with libraries that meet all criteria for exemption.

Goals and Objectives for Strategic Issue #5 – Standards

Goal: Revise the Waukesha County library standards to reflect the changing role of libraries, to create new minimum acceptable levels of resource inputs for library services within the county, and to provide quality assurance checks that will result in improved library services countywide.

Objective: The regional library system will seek the approval for the new *Minimums to Exempt* and *Quality Assurance Standards* at every library in Waukesha County.

Objective: The regional library system will seek the approval of the *Minimums to Exempt* and *Quality Assurance Standards* by the Waukesha County Board of Supervisors.

Goal: Monitor compliance with the Minimums to Exempt, Quality Assurance Standards, and municipal requirement to meet or exceed county library tax rate.

Objective: The regional library system will annually certify whether each library and library municipality has met its requirement to quality for the municipal exemption in the county library tax.

Strategic Issue #6. Library Establishment

There are 16 established public libraries in Waukesha County. Since 1986, our state law has required county approval for a township to establish a library or form a joint library with an existing library. However, cities and villages are not required to gain such approval. Municipalities with libraries can choose to abolish those libraries at any time.

State library law allows a county board to disallow a proposed library or a joint library that includes one or more towns because of the potential impact that change could have on the county library tax base. No such prohibition exists for cities and villages. They can form libraries or join with existing libraries when they see fit.

It is critical that any proposed new library demonstrate that it can and will meet the county library *Minimums to Exempt* and *Quality Assurance Standards* before it is eligible for exemption from the county library tax.

Goals and Objectives for Strategic Issue #6 – Library Establishment

Goal: Monitor the county library landscape for new library establishments or partnerships so that all parties have the information needed for proper decision-making.

Objective: The regional library system will communicate information to all stakeholders about potential new libraries so that there is adequate time for all parties to respond to potential changes in funding.

Strategic Issue #7. Relationships with Others

While Act 150 and Act 420 provided much needed county funding for libraries in Wisconsin, Wis. Stats. 43.12 does not completely address the issue of non-resident use of municipal libraries. There are several exceptions that cause problems, especially in Waukesha County along the northern and eastern borders.

While Wisconsin law requires county funding for adjacent county library usage, Milwaukee County is excluded from the requirement. Communities that border Milwaukee County are free to serve or not serve Milwaukee County residents based on a local library board decision. Some libraries choose to serve residents of Milwaukee County because they believe the impact to be minimal and the commitment to open access worthy of an “open door” policy. Some libraries charge fees to residents of Milwaukee County in an attempt to receive some revenue from the residents for whom they are not being reimbursed with tax dollars. Other libraries choose not to serve Milwaukee County residents because they do not wish to have their residents subsidize people who are not at least partially funding the service.

Act 420 also does not require county funding for library usage across borders in the case of two communities with libraries that lie in close proximity to one another in separate counties and separate library systems. In Waukesha County, this problem is most severe in the case of the Menomonee Falls Public Library. The library is on the northeastern edge of the county, bordering Washington and Milwaukee Counties. The Menomonee Falls Public Library does not receive funding from Milwaukee County as previously described. Additionally, there are residents from the Village of Germantown (a community with a library) who would use the Menomonee Falls Library if allowed to do so. Act 420 requires counties to pay for use by residents of only those communities without libraries—not communities like the Village of Germantown. The Menomonee Falls Public Library is allowed, by statute, to deny services to residents of any municipality with a library if the circulation is 500 or more. The Menomonee Falls Public Library board of trustees made the decision many years ago to deny library services to the residents of Germantown after a number of efforts to receive reimbursement failed.

Looking at the southern edge of Waukesha County, the regional library system board has a long-standing agreement in place with Lakeshores Library System that adequately addresses

the cross-county borrowing issues along the southern border. That agreement is between the two regional library systems and is reviewed/approved annually. On the western border, there are not significant issues that are not being adequately addressed by the provisions in Act 420.

Ultimately, whether a library board chooses to provide library service to citizens who are not providing any funding for that service is a local decision driven by philosophy and local circumstances. Due to the desire to maintain strong local autonomy, the committee does not recommend setting a countywide policy on whether local library service should be denied or allowed in the event of an adjacent county funding situation.

Goals and Objectives for Strategic Issue #7 – Relationships with Others

Goal: Ensure that there is dialog in areas where there are denials of library service to citizens.

Objective: The regional library system will hold an annual meeting between Menomonee Falls Library and Germantown Library to share information and discuss possible solutions as required by statute.

Objective: The regional library system will track the amount of usage by Milwaukee County residents in Waukesha County and share the information with libraries.

Strategic Issue #8. CAFÉ Shared Automation System

CAFÉ (Catalog Access for Everyone) is a shared integrated library system (ILS) created for the benefit of all the libraries in the county and in the regional library system. Until 2011, CAFÉ was owned and operated by the Waukesha Public Library for 14 of the 16 county libraries. In April of 2011, the ownership and operation of CAFÉ was transferred to the regional library system. Since that time, New Berlin and Menomonee Falls have joined CAFÉ. Additionally, all of the libraries in Jefferson County joined CAFÉ when the new regional library system was formed on January 1, 2016. There are currently 24 public libraries in the CAFÉ automation consortium.

CAFÉ is a member-funded consortium. That member ownership is considered important due to its essential role in the operation of a modern library. Not only does CAFÉ offer access to the citizens to all the materials owned by all the 24 member libraries, but it also provides the software for all circulation operations and related data gathering. Because CAFÉ does not rely on state funding, it is not at high risk in the event of changes to regional library systems in Wisconsin. However, it is imperative that CAFÉ be sufficiently funded locally to ensure stability in operations and membership fees.

Goals and Objectives for Strategic Issue #8 – CAFÉ Shared Automation System

Goal: Continue to encourage CAFÉ cooperation and proper planning and funding to ensure it remains a viable option for Waukesha County libraries.

Objective: At least once during the plan, the regional library system will evaluate the effectiveness of CAFÉ from a user’s perspective by conducting a user survey or other appropriate data collection methods.

Objective: The regional library system will provide oversight for CAFÉ operations and will annually set a CAFÉ budget that includes membership fees that provide sufficient funds to allow for regular hardware and software replacement.

Strategic Issue #9. Regional Library System Membership and Services

Waukesha County operated as a single county library system for almost 35 years until December 31, 2015. As such, there was not separation of the county library services and the regional library system. In fact, all county library administrative duties have been handled by the regional library system and the regional library system board has acted as a de facto county library board. Duties and roles between the various partners were clarified as a result of adding Jefferson County to the regional library system in 2016. Waukesha County was selected to be the fiscal agent for the newly formed regional library system. The regional library system staff was charged with carrying out the duties related to county library services as requested by the counties. Regional library system board member allocation was agreed upon between Waukesha and Jefferson Counties. Per Wisconsin Statute, the allocation is based on approximate population: Waukesha County has eight seats on the library system board and Jefferson County has three seats on the library system board. The ratio is to be revisited with each census.

The merger of the two counties was successful in that it offered efficiencies that translated to reduced costs for local libraries, additional access to resources for citizens, and additional revenue in excess of expenditures that could be used to fund carefully selected strategic priorities. The success of the project was not accidental; the project took more than a year to complete and involved an analysis of impacts prior to approval as well as the actual work to bring about comprehensive organizational change. The Waukesha County libraries made clear that they needed their library system to continue to be as effective and responsive to their needs as in the past and that the additional libraries should not detract from the needed level of service. Because the regional library system has acted in the role of providing county library

services, the reliance on and expectation for services is likely greater than elsewhere in Wisconsin.

A statewide Public Library System Redesign (PLSR) Project to study ways library systems in Wisconsin can increase effectiveness and efficiencies was completed in 2018. Based on the study results and recommendations, it is safe to say that resource sharing and collaboration will continue to be key elements of regional library systems now and in the future. It is important for libraries and library systems to be engaged in the PLSR implementation process to keep our regional library systems strong and able to provide services to and for Waukesha County libraries.

Goals and Objectives for Strategic Issue #9 – Regional Library Systems

Goal: Encourage the DPI Division for Libraries and Technology PLSR implementation team to focus its efforts on making improvements in library system effectiveness so that Waukesha County libraries benefit from increased services and a higher level of support.

Objective: The regional library system staff will engage in the PLSR implementation process to ensure that ideas for improvements are offered throughout the planning and implementation of each project recommendation.

Objective: The regional library system staff will engage in the PLSR implementation process to ensure that ideas that surface that could be detrimental to Waukesha County libraries are communicated to stakeholders in a timeframe that offers the possibility for the county, the municipalities, and the libraries to take action to influence the outcome for the benefit of Waukesha County citizens.

Plan Implementation

This county library plan will be presented for adoption to the Waukesha County Board of Supervisors upon approval by the county library planning committee. It will be filed with the Department of Public Instruction to meet the state's county library planning requirements. A separate process will be used for the adoption of the revised county library standards. Because local library board action, in addition to county board approval, is required for library standards, that process will take additional time. In the event the county library standards are not approved (in accordance with the requirements in the statute), the current library standards will remain in place. In the event of that scenario, the county board of supervisors has the option to form a new county library planning committee or revive the past committee to review the standards and make new recommendations before the end of the adopted five-year plan.

Review of the Plan

This plan will be reviewed annually by the regional library system board. This is a five-year plan, and the expectation is that a new plan will be approved prior to the expiration of this plan. In the event of a change in library systems in the state of Wisconsin that results in a change to Waukesha County's ability to rely on its regional library system for quality services, a county library planning committee will be convened to study options and create a new county library plan for consideration and approval by the Waukesha County Board of Supervisors.

Appendices

Appendix A

Current Waukesha County Code - Sec. 11-8 Library Tax Levy Distribution Formula

Sec. 11-8 Library Tax Levy Distribution Formula.

(a) Purpose. To provide a fair, stable and clearly state County library tax levy distribution formula for the Waukesha County Library Planning Committee to utilize based on Non-Resident and net crossover borrowing/lending circulations.

(b) Definitions. For purposes of this section:

1. *Non-Resident Library Circulation* shall mean the total annual amount of circulation that a Waukesha County Federated System library lends to residents of Waukesha County communities without libraries.
2. *Crossover Lending Circulation* shall mean the lending of library materials, in person or by inter-library loan, by a Waukesha County Federated System library to residents of another Waukesha County Federated System library community.
3. *Crossover Borrowing Circulation* shall mean the borrowing of library materials, in person or by inter-library loan, from a Waukesha County Federated System library by residents of another Waukesha County Federated System library community.
4. *Net Crossover Circulation* shall mean a Waukesha County library community's total annual Crossover Lending Circulation, less its total annual Crossover Borrowing Circulation.
5. *Library County Levy Circulation (LCC) Effort* shall mean the sum of a Waukesha County Federated System library community's total annual Non-Resident Library Circulation and Net Crossover Circulation.
6. *Positive Library County Levy Circulation (LCC) Effort Rate* shall mean, for each Waukesha County Federated System library with a positive Library County Levy Circulation Effort, the proportion of the sum of all positive Library County Levy Circulation Effort.

7. *Circulation* shall mean materials borrowed from a library in the year prior to the year in which the Library Tax is levied.
 8. *Operating Expenditure per Circulation* shall mean the amount computed by dividing a library's total operating expenditures by its total circulation, using data from the year prior to the year in which the Library Tax is levied.
- (c) County Library Levy Distribution Formula. The levy distribution formula shall be determined using two separate allocations.
1. The first allocation for each library's annual share of the Waukesha County Library Levy will be based on s.43.12 (1), Wisconsin Statutes, which requires that each library receive an amount equal to at least 70% of their total operating expenditures, incurred during the year prior to the levy being imposed, multiplied by the proportion of the library's total circulation lent to Waukesha County Non-Residents.
 2. The second allocation for each library's annual share of the Waukesha County Library Levy shall be determined from the remaining annual levy after the first allocation. Only libraries with a positive LCC Effort are eligible for the second Library Levy allocation. The second allocation is determined by multiplying each library's County LCC Effort Rate by the remaining levy. This second allocation will be added to each library's first levy allocation in (1).
 3. To provide stability in funding, no library shall receive a decrease greater than 5% or \$5,000 of the levy distribution, based on the change from the prior year levy distribution, whichever is less, unless further adjustments to the limits are needed as identified in (5). A library will be limited to no greater than a 5% or \$5,000 increase from the prior year, unless it would result in an amount less than the first allocation in (1) or additional funds are available (for allocation in (4)) after complying with the requirements in this paragraph.
 4. County Library Levy remaining after adjustments in (3) will be allocated on the same basis as the second allocation in (2). If the stability adjustment in (3) results in a deficit, whereby the total distribution exceeds available Library Levy, libraries receiving increases in the second allocation after the File Number: 163-O-030 stability adjustment will have their preliminary increases reduced proportionately, until the total reduction is sufficient to offset the deficit. For any library receiving proportional reductions, the adjustment may not cause the following:
 - a. The library's distribution to be lower than its allocation in (1).

- b. The library's distribution to be a net decrease from the prior year.
5. During years when the decrease in total available Library Tax Levy produces a deficit in (4) large enough that [4(b)] cannot be satisfied, limits will be adjusted on allowable decreases in distributions to individual libraries by 5 percentage points and \$5,000, incrementally, until the deficit can be offset with proportional reductions in preliminary allocations to comply with [4(b)], with the exception that no individual library's reduction may exceed 25% of its prior year distribution.

Appendix B

Minimum to Exempt for Each Service Factor Based on Municipal Population

Population	Material Expenditures (2024)	Expenditures/ Capita (2024)	Hours Open	FTE	Collection Size	Computers /Internet Devices
1,000	\$6,250	\$6.25	35	2.00	13,000	2
1,500	\$9,375	\$6.25	35	2.00	13,000	2
2,000	\$12,500	\$6.25	35	2.00	13,000	2
2,500	\$15,625	\$6.25	36	2.00	13,000	2
3,000	\$18,750	\$6.25	38	3.00	17,000	3
3,500	\$21,875	\$6.25	39	3.00	21,000	3
4,000	\$25,000	\$6.25	40	4.00	25,000	3
4,500	\$28,125	\$6.25	41	4.00	29,000	3
5,000	\$31,250	\$6.25	43	5.00	33,000	4
5,500	\$34,375	\$6.25	44	5.00	37,000	4
6,000	\$37,500	\$6.25	45	6.00	41,000	4
6,500	\$40,625	\$6.25	46	6.00	45,000	4
7,000	\$43,750	\$6.25	48	7.00	49,000	5
7,500	\$46,875	\$6.25	49	7.00	53,000	5
8,000	\$50,000	\$6.25	50	8.00	57,000	5
8,500	\$53,125	\$6.25	51	8.00	61,000	5
9,000	\$56,250	\$6.25	53	9.00	65,000	6
9,500	\$59,375	\$6.25	54	9.00	69,000	6
10,000	\$62,500	\$5.25	55	10.00	73,000	6
10,500	\$65,125	\$5.25	55	10.10	74,000	6
11,000	\$67,750	\$5.25	55	10.20	75,000	7
11,500	\$70,375	\$5.25	55	10.31	76,000	7
12,000	\$73,000	\$5.25	55	10.41	77,000	7
12,500	\$75,625	\$5.25	55	10.51	78,000	7
13,000	\$78,250	\$5.25	55	10.62	79,000	8
13,500	\$80,875	\$5.25	55	10.73	80,000	8
14,000	\$83,500	\$5.25	55	10.84	81,000	8
14,500	\$86,125	\$5.25	55	10.94	82,000	8
15,000	\$88,750	\$5.25	56	11.05	83,000	9
15,500	\$91,375	\$5.25	56	11.17	84,000	9
16,000	\$94,000	\$5.25	56	11.28	85,000	9
16,500	\$96,625	\$5.25	56	11.39	86,000	9
17,000	\$99,250	\$5.25	56	11.51	87,000	10
17,500	\$101,875	\$5.25	56	11.62	88,000	10
18,000	\$104,500	\$5.25	56	11.74	89,000	10

¹MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

Population	Material Expenditures (2024)	Expenditures/ Capita (2024)	Hours Open/Week	FTE Budgeted	Collection Size	Computers/ Internet Devices
18,500	\$107,125	\$5.25	56	11.86	90,000	10
19,000	\$109,750	\$5.25	56	11.98	91,000	11
19,500	\$112,375	\$5.25	56	12.10	92,000	11
20,000	\$115,000	\$5.25	57	12.22	93,000	11
20,500	\$117,625	\$5.25	57	12.34	94,000	11
21,000	\$120,250	\$5.25	57	12.47	95,000	12
21,500	\$122,875	\$5.25	57	12.59	96,000	12
22,000	\$125,500	\$5.25	57	12.72	97,000	12
22,500	\$128,125	\$5.25	57	12.85	98,000	12
23,000	\$130,750	\$5.25	57	12.98	99,000	13
23,500	\$133,375	\$5.25	57	13.11	100,000	13
24,000	\$136,000	\$5.25	57	13.24	101,000	13
24,500	\$138,625	\$5.25	57	13.38	102,000	13
25,000	\$141,250	\$5.25	58	13.51	103,000	14
25,500	\$143,875	\$5.25	58	13.64	103,800	14
26,000	\$146,500	\$5.25	58	13.77	104,600	14
26,500	\$149,125	\$5.25	58	13.90	105,400	14
27,000	\$151,750	\$5.25	58	14.03	106,200	15
27,500	\$154,375	\$5.25	58	14.16	107,000	15
28,000	\$157,000	\$5.25	58	14.30	107,800	15
28,500	\$159,625	\$5.25	58	14.44	108,600	15
29,000	\$162,250	\$5.25	58	14.57	109,400	16
29,500	\$164,875	\$5.25	58	14.71	110,200	16
30,000	\$167,500	\$5.25	59	14.85	111,000	16
30,500	\$170,125	\$5.25	59	14.99	111,800	16
31,000	\$172,750	\$5.25	59	15.13	112,600	17
31,500	\$175,375	\$5.25	59	15.28	113,400	17
32,000	\$178,000	\$5.25	59	15.42	114,200	17
32,500	\$180,625	\$5.25	59	15.57	115,000	17
33,000	\$183,250	\$5.25	59	15.72	115,800	18
33,500	\$185,875	\$5.25	59	15.87	116,600	18
34,000	\$188,500	\$5.25	59	16.02	117,400	18
34,500	\$191,125	\$5.25	59	16.17	118,200	18
35,000	\$193,750	\$5.25	60	16.32	119,000	19
35,500	\$196,375	\$5.25	60	16.48	119,800	19
36,000	\$199,000	\$5.25	60	16.63	120,600	19
36,500	\$201,625	\$5.25	60	16.79	121,400	19

¹MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

Population	Material Expenditures (2024)	Expenditures/ Capita (2024)	Hours Open/Week	FTE Budgeted	Collection Size	Computers/ Internet Devices
37,000	\$204,250	\$5.25	60	16.95	122,200	20
37,500	\$206,875	\$5.25	60	17.11	123,000	20
38,000	\$209,500	\$5.25	60	17.28	123,800	20
38,500	\$212,125	\$5.25	60	17.44	124,600	20
39,000	\$214,750	\$5.25	60	17.61	125,400	21
39,500	\$217,375	\$5.25	60	17.77	126,200	21
40,000	\$220,000	\$5.25	60	17.94	127,000	21
40,500	\$222,625	\$5.25	60	18.11	127,800	21
41,000	\$225,250	\$5.25	60	18.28	128,600	22
41,500	\$227,875	\$5.25	60	18.46	129,400	22
42,000	\$230,500	\$5.25	60	18.63	130,200	22
42,500	\$233,125	\$5.25	60	18.81	131,000	22
43,000	\$235,750	\$5.25	60	18.99	131,800	23
43,500	\$238,375	\$5.25	60	19.17	132,600	23
44,000	\$241,000	\$5.25	60	19.35	133,400	23
44,500	\$243,625	\$5.25	60	19.54	134,200	23
45,000	\$246,250	\$5.25	60	19.72	135,000	24
45,500	\$248,875	\$5.25	60	19.91	135,800	24
46,000	\$251,500	\$5.25	60	20.10	136,600	24
46,500	\$254,125	\$5.25	60	20.29	137,400	24
47,000	\$256,750	\$5.25	60	20.48	138,200	25
47,500	\$259,375	\$5.25	60	20.68	139,000	25
48,000	\$262,000	\$5.25	60	20.87	139,800	25
48,500	\$264,625	\$5.25	60	21.07	140,600	25
49,000	\$267,250	\$5.25	60	21.27	141,400	26
49,500	\$269,875	\$5.25	60	21.47	142,200	26
50,000	\$272,500	\$5.25	60	21.68	143,000	26
50,500	\$275,125	\$5.25	60	21.88	143,500	26
51,000	\$277,750	\$5.25	60	22.09	144,000	27
51,500	\$280,375	\$5.25	60	22.30	144,500	27
52,000	\$283,000	\$5.25	60	22.51	145,000	27
52,500	\$285,625	\$5.25	60	22.73	145,500	27
53,000	\$288,250	\$5.25	60	22.94	146,000	28
53,500	\$290,875	\$5.25	60	23.16	146,500	28

¹MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

Population	Material Expenditures (2024)	Expenditures/ Capita (2024)	Hours Open/Week	FTE Budgeted	Collection Size	Computers/ Internet Devices
54,000	\$293,500	\$5.25	60	23.38	147,000	28
54,500	\$296,125	\$5.25	60	23.60	147,500	28
55,000	\$298,750	\$5.25	60	23.83	148,000	29
55,500	\$301,375	\$5.25	60	24.05	148,500	29
56,000	\$304,000	\$5.25	60	24.28	149,000	29
56,500	\$306,625	\$5.25	60	24.51	149,500	29
57,000	\$309,250	\$5.25	60	24.74	150,000	30
57,500	\$311,875	\$5.25	60	24.98	150,500	30
58,000	\$314,500	\$5.25	60	25.22	151,000	30
58,500	\$317,125	\$5.25	60	25.46	151,500	30
59,000	\$319,750	\$5.25	60	25.70	152,000	31
59,500	\$322,375	\$5.25	60	25.94	152,500	31
60,000	\$325,000	\$5.25	60	26.19	153,000	31
60,500	\$327,625	\$5.25	60	26.44	153,500	31
61,000	\$330,250	\$5.25	60	26.69	154,000	32
61,500	\$332,875	\$5.25	60	26.94	154,500	32
62,000	\$335,500	\$5.25	60	27.20	155,000	32
62,500	\$338,125	\$5.25	60	27.46	155,500	32
63,000	\$340,750	\$5.25	60	27.72	156,000	33
63,500	\$343,375	\$5.25	60	27.98	156,500	33
64,000	\$346,000	\$5.25	60	28.25	157,000	33
64,500	\$348,625	\$5.25	60	28.51	157,500	33
65,000	\$351,250	\$5.25	60	28.79	158,000	34
65,500	\$353,875	\$5.25	60	29.06	158,500	34
66,000	\$356,500	\$5.25	60	29.34	159,000	34
66,500	\$359,125	\$5.25	60	29.61	159,500	34
67,000	\$361,750	\$5.25	60	29.90	160,000	35
67,500	\$364,375	\$5.25	60	30.18	160,500	35
68,000	\$367,000	\$5.25	60	30.47	161,000	35
68,500	\$369,625	\$5.25	60	30.76	161,500	35
69,000	\$372,250	\$5.25	60	31.05	162,000	36
69,500	\$374,875	\$5.25	60	31.34	162,500	36
70,000	\$377,500	\$5.25	60	31.64	163,000	36
70,500	\$380,125	\$5.25	60	31.94	163,500	36
71,000	\$382,750	\$5.25	60	32.24	164,000	37
71,500	\$385,375	\$5.25	60	32.55	164,500	37
72,000	\$388,000	\$5.25	60	32.86	165,000	37

¹MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

Population	Material Expenditures (2024)	Expenditures/ Capita (2024)	Hours Open/Week	FTE Budgeted	Collection Size	Computers/ Internet Devices
72,500	\$390,625	\$5.25	60	33.17	165,500	37
73,000	\$393,250	\$5.25	60	33.49	166,000	38
73,500	\$395,875	\$5.25	60	33.81	166,500	38
74,000	\$398,500	\$5.25	60	34.13	167,000	38
74,500	\$401,125	\$5.25	60	34.45	167,500	38
75,000	\$403,750	\$5.25	60	34.78	168,000	39
75,500	\$406,375	\$5.25	60	35.11	168,500	39
76,000	\$409,000	\$5.25	60	35.44	169,000	39
76,500	\$411,625	\$5.25	60	35.78	169,500	39
77,000	\$414,250	\$5.25	60	36.12	170,000	40
77,500	\$416,875	\$5.25	60	36.46	170,500	40
78,000	\$419,500	\$5.25	60	36.81	171,000	40
78,500	\$422,125	\$5.25	60	37.16	171,500	40
79,000	\$424,750	\$5.25	60	37.51	172,000	41
79,500	\$427,375	\$5.25	60	37.87	172,500	41
80,000	\$430,000	\$5.25	60	38.23	173,000	41
80,500	\$432,625	\$5.25	60	38.59	173,500	41
81,000	\$435,250	\$5.25	60	38.96	174,000	42
81,500	\$437,875	\$5.25	60	39.33	174,500	42
82,000	\$440,500	\$5.25	60	39.70	175,000	42
82,500	\$443,125	\$5.25	60	40.08	175,500	42
83,000	\$445,750	\$5.25	60	40.46	176,000	43
83,500	\$448,375	\$5.25	60	40.84	176,500	43
84,000	\$451,000	\$5.25	60	41.23	177,000	43
84,500	\$453,625	\$5.25	60	41.62	177,500	43
85,000	\$456,250	\$5.25	60	42.02	178,000	44
85,500	\$458,875	\$5.25	60	42.42	178,500	44
86,000	\$461,500	\$5.25	60	42.82	179,000	44
86,500	\$464,125	\$5.25	60	43.23	179,500	44
87,000	\$466,750	\$5.25	60	43.64	180,000	45
87,500	\$469,375	\$5.25	60	44.05	180,500	45
88,000	\$472,000	\$5.25	60	44.47	181,000	45
88,500	\$474,625	\$5.25	60	44.89	181,500	45
89,000	\$477,250	\$5.25	60	45.32	182,000	46
89,500	\$479,875	\$5.25	60	45.75	182,500	46
90,000	\$482,500	\$5.25	60	46.18	183,000	46

¹MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

Appendix C

New Minimums vs. Actuals for Waukesha County Libraries based on 2020 Data (data will be updated annually). Materials Spending per Capita will increase \$0.15 in 2023 and an additional \$0.10 to \$0.25 in 2024.

Library	Big Bend	Population	1,483	
		Actual Material Expenditures	\$11,022	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$6.00	\$7.43	YES
Hours Open		35	40	YES
FTE		2.00	2.00	YES
Collection Size		13,000	14,514	YES
Public Computers/Internet Access Devices		2	3	YES
Wireless Internet Access		Yes	Yes	YES

Library	Brookfield	Population	41,464	
		Actual Material Expenditures	\$437,961	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$5.24	\$10.56	YES
Hours Open		60	51	NO
FTE		18.28	30.38	YES
Collection Size		128,600	188,930	YES
Public Computers/Internet Access Devices		22	72	YES
Wireless Internet Access		Yes	Yes	YES

Library	Butler	Population	1,787	
		Actual Material Expenditures	\$11,080	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$6.00	\$6.20	YES
Hours Open		35	32	NO
FTE		2.00	2.20	YES
Collection Size		13,000	26,854	YES
Public Computers/Internet Access Devices		2	8	YES
Wireless Internet Access		Yes	Yes	YES

Library	Delafield	Population	7,185	
		Actual Material Expenditures	\$79,224	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$6.00	\$11.03	YES
Hours Open		48	43	NO
FTE		7.00	10.33	YES
Collection Size		49,000	79,947	YES
Public Computers/Internet Access Devices		5	15	YES
Wireless Internet Access		Yes	Yes	YES

Library	Eagle	Population	5,690	
		Actual Material Expenditures	\$38,915	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$6.00	\$6.84	YES
Hours Open		44	41	NO
FTE		5.00	5.53	YES
Collection Size		37,000	39,727	YES
Public Computers/Internet Access Devices		4	7	YES
Wireless Internet Access		Yes	Yes	YES

Library	Elm Grove	Population	6,513	
		Actual Material Expenditures	\$79,754	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$6.00	\$12.25	YES
Hours Open		46	37	NO
FTE		6.00	5.91	NO
Collection Size		45,000	64,278	YES
Public Computers/Internet Access Devices		4	6	YES
Wireless Internet Access		Yes	Yes	YES

Library	Hartland	Population	9,501	
		Actual Material Expenditures	\$87,100	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$6.00	\$9.17	YES
Hours Open		54	49	NO
FTE		9.00	9.81	YES
Collection Size		69,000	77,109	YES
Public Computers/Internet Access Devices		6	10	YES
Wireless Internet Access		Yes	Yes	YES

Library	Menomonee Falls	Population	38,527	
		Actual Material Expenditures	\$207,558	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$5.26	\$5.39	YES
Hours Open		60	54	NO
FTE		17.44	20.61	YES
Collection Size		124,600	124,430	NO
Public Computers/Internet Access Devices		20	52	YES
Wireless Internet Access		Yes	Yes	YES

Library	Mukwonago	Population	8,262	
		Actual Material Expenditures	\$77,883	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$6.00	\$9.43	YES
Hours Open		50	50	YES
FTE		8.00	13.66	YES
Collection Size		57,000	98,876	YES
Public Computers/Internet Access Devices		5	36	YES
Wireless Internet Access		Yes	Yes	YES

Library	Muskego	Population	25,032	
		Actual Material Expenditures	\$159,559	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$5.40	\$6.37	YES
Hours Open		58	56	NO
FTE		13.51	14.30	YES
Collection Size		103,000	125,928	YES
Public Computers/Internet Access Devices		14	18	YES
Wireless Internet Access		Yes	Yes	YES

Library	New Berlin	Population	40,451	
		Actual Material Expenditures	\$239,599	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$5.25	\$5.92	YES
Hours Open		60	62	YES
FTE		17.94	19.35	YES
Collection Size		127,000	147,965	YES
Public Computers/Internet Access Devices		21	40	YES
Wireless Internet Access		Yes	Yes	YES

Library	North Lake	Population	8,469	
		Actual Material Expenditures	\$58,548	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$6.00	\$6.91	YES
Hours Open		50	47	NO
FTE		8.00	9.92	YES
Collection Size		57,000	69,145	YES
Public Computers/Internet Access Devices		5	9	YES
Wireless Internet Access		Yes	Yes	YES

Library	Oconomowoc	Population	18,203	
		Actual Material Expenditures	\$134,353	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$5.55	\$7.38	YES
Hours Open		56	50	NO
FTE		11.74	13.83	YES
Collection Size		89,000	103,875	YES
Public Computers/Internet Access Devices		10	20	YES
Wireless Internet Access		Yes	Yes	YES

Library	Pewaukee	Population	24,152	
		Actual Material Expenditures	\$117,282	
		Minimum Materials Expenditures (If does not pass.)	\$130,759	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$5.41	\$4.86	NO
Hours Open		57	53	NO
FTE		13.24	13.63	YES
Collection Size		101,000	101,817	YES
Public Computers/Internet Access Devices		13	19	YES
Wireless Internet Access		Yes	Yes	YES

Library	Sussex	Population	11,487	
		Actual Material Expenditures	\$118,443	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$5.87	\$10.31	YES
Hours Open		55	51	NO
FTE		10.20	14.52	YES
Collection Size		75,000	95,150	YES
Public Computers/Internet Access Devices		7	7	YES
Wireless Internet Access		Yes	Yes	YES

Library	Waukesha	Population	71,158	
		Actual Material Expenditures	\$449,581	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
\$ Materials/Capita		\$5.14	\$6.32	YES
Hours Open		60	62	YES
FTE		32.24	45.98	YES
Collection Size		164,000	285,626	YES
Public Computers/Internet Access Devices		37	86	YES
Wireless Internet Access		Yes	Yes	YES

Appendix D

Materials and Services Provided by Waukesha County Libraries					
	Books	Audiobooks	DVDs	Magazines	Newspapers
Big Bend	X	X	X	X	X
Brookfield	X	X	X	X	X
Butler	X	X	X	X	X
Delafield	X	X	X	X	X
Eagle	X	X	X	X	X
Elm Grove	X	X	X	X	X
Hartland	X	X	X	X	X
Menomonee Falls	X	X	X	X	X
Mukwonago	X	X	X	X	X
Muskego	X	X	X	X	X
New Berlin	X	X	X	X	X
North Lake	X	X	X	X	X
Oconomowoc	X	X	X	X	X
Pewaukee	X	X	X	X	X
Sussex	X	X	X	X	X
Waukesha	X	X	X	X	X

	Music on CD	Internet Access	Wi-Fi Access	Outdoor Wi-Fi	e-books
Big Bend	X	X	X		X
Brookfield	X	X	X		X
Butler	X	X	X		X
Delafield	X	X	X	X	X
Eagle	X	X	X		X
Elm Grove	X	X	X	X	X
Hartland	X	X	X		X
Menomonee Falls	X	X	X	X	X
Mukwonago	X	X	X	X	X
Muskego	X	X	X	X	X
New Berlin	X	X	X		X
North Lake	X	X	X		X
Oconomowoc	X	X	X	X	X
Pewaukee	X	X	X	X	X
Sussex	X	X	X	X	X
Waukesha	X	X	X	X	X

Materials and Services Provided by Waukesha County Libraries

	e-audiobooks	Streaming Video	Digital Magazines	Library of Things	Experience passes
Big Bend	x		x		
Brookfield	x		x		
Butler	x		x		
Delafield	x		x	x	x
Eagle	x		x	X	
Elm Grove	x		x	x	
Hartland	x		x	x	
Menomonee Falls	x	x	x	x	x
Mukwonago	x		x		
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake	x		x		
Oconomowoc	x	x	x	x	x
Pewaukee	x		x		x
Sussex	x	x	x		
Waukesha	x	x	x		x

	Online Databases	Gale Courses	Technology Assistance	Devices for Check out	Public Copier (B&W)
Big Bend	x	x	x		x
Brookfield	x	x	x		x
Butler	x	x	x		x
Delafield	x	x	x	x	x
Eagle	x	x	x	x	x
Elm Grove	x	x	x		x
Hartland	x	x	x	x	x
Menomonee Falls	x	x	x		x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake	x	x	x	x	x
Oconomowoc	x	x	x	x	x
Pewaukee	x	x	x		x
Sussex	x	x	x		x
Waukesha	x	x	x	x	x

Materials and Services Provided by Waukesha County Libraries

	Public Copier (Color)	Public Computer Printing (B&W)	Public Computer Printing (Color)	Wireless Printing	Faxing Service
Big Bend	x	x	x		x
Brookfield		x		x	
Butler	x	x	x		
Delafield	x	x	x		
Eagle	x	x	x	x	x
Elm Grove	x	x	x		x
Hartland	x	x	x	x	x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x		
North Lake	x	x	x		x
Oconomowoc	x	x	x	x	
Pewaukee		x		x	
Sussex	x	x	x	x	x
Waukesha	x	x	x	x	x

	Public Scanner	Microfilm Reader	Local History Resources	Curbside Service	Outreach Services
Big Bend			x	x	x
Brookfield	x	x	x		x
Butler	x		x		x
Delafield	x		x	x	x
Eagle	x		x	x	x
Elm Grove	x	x	x		x
Hartland	x	x	x		x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake			x		x
Oconomowoc	x	x	x	x	x
Pewaukee			x	x	x
Sussex	x		x	x	x
Waukesha	x	x	x	x	x

Materials and Services Provided by Waukesha County Libraries

	Programs for adults	Programs for children	Summer Library Program	Programs for teens	Online programs
Big Bend	x	x	x	x	
Brookfield	x	x	x	x	
Butler	x	x	x	x	
Delafield	x	x	x	x	x
Eagle	x	x	x	x	x
Elm Grove	x	x	x	x	
Hartland		x	x	x	
Menomonee Falls	x	x	x	x	x
Mukwonago		x	x	x	
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake	x	x	x	x	
Oconomowoc	x	x	x	x	x
Pewaukee	x	x	x	x	
Sussex	x	x	x	x	x
Waukesha	x	x	x	x	x

	Interlibrary Loan Service	Meeting Room(s)	Art Gallery or Wall	Tables & Seating	Teen Area	Exam proctoring
Big Bend	X	x		x		x
Brookfield	x	x	x	x	x	x
Butler	x	x		x	x	x
Delafield	x	x	x	x	x	x
Eagle	x	x		x	x	x
Elm Grove	x	x		x	x	x
Hartland	x	x		x	x	x
Menomonee Falls	x	x	x	x	x	x
Mukwonago	x	x		x	x	x
Muskego	x	x		x	x	x
New Berlin	x	x	x	x	x	
North Lake	x	x		x	x	x
Oconomowoc	x	x	x	x	x	x
Pewaukee	x	x		x	x	x
Sussex	x	x		x	x	x
Waukesha	x	x	x	x	x	x

Materials and Services Provided by Waukesha County Libraries

	Reference Services	Readers Advisory	Income Tax Forms	Tax Preparation Assistance	Low Vision Reader
Big Bend	x	x	x		x
Brookfield	x	x	x	x	x
Butler	x	x	x		x
Delafield	x	x	x (end 2022)		x
Eagle	x	x	x		x
Elm Grove	x	x	x		x
Hartland	x	x	x		x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x		x
North Lake	x	x	x		x
Oconomowoc	x	x	x		x
Pewaukee	x	x	x		
Sussex	x	x	x		x
Waukesha	x	x	x	x	x

	Library Website	After-Hours Meeting Space	Job Search Info & Assistance	Friends of the Library Group	Trained Staff
Big Bend	x	x	x		x
Brookfield	x	x	x	x	x
Butler	x	x	x	x	x
Delafield	x	x	x	x	x
Eagle	x	x	x	x	x
Elm Grove	x	x	x	x	x
Hartland	x	x	x	x	x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake	x	x	x	x	x
Oconomowoc	x	x	x	x	x
Pewaukee	x	x	x	x	x
Sussex	x	x	x	x	x
Waukesha	x	x	x	x	x

Materials and Services Provided by Waukesha County Libraries

	Makerspace Lab	3D Printer	Self-Checkout	Coffee	Home Delivery	Wi-Fi Hotspots for Checkout
Big Bend						
Brookfield			x		x	x
Butler						
Delafield			x		x	x
Eagle				x	x	x
Elm Grove					x	
Hartland			x	x	x	x
Menomonee Falls	x	x	x		x	x
Mukwonago	x	x	x	x	x	x
Muskego		x	x			x
New Berlin	x	x	x		x	x
North Lake	x		x			x
Oconomowoc			Coming '22		x	x
Pewaukee			x			
Sussex			x	x	x	x
Waukesha	x	x	x		x	x

	Outdoor Space	Newsletter	Social Media Presence	Notary Services	Group Technology Training
Big Bend			x		
Brookfield	x	x	x		x
Butler			x		
Delafield	x	x	x		x
Eagle		x	x		
Elm Grove		x	x		
Hartland	x	x	x		
Menomonee Falls	x	x	x		x
Mukwonago	x	x	x	x	
Muskego	x	x	x		
New Berlin	x	x	x		x
North Lake		x	x		x
Oconomowoc		x	x		x
Pewaukee	x	x	x		
Sussex		x	x		
Waukesha		x	x		

Materials and Services Provided by Waukesha County Libraries

	Handicapped Accessible Building	Designated Warming/Cooling Shelter	Digitized local history	STEM Lab	Early Literacy Play Areas
Big Bend	x				
Brookfield	x		x		x
Butler	x				x
Delafield	x	x			x
Eagle	x	x			
Elm Grove	x				x
Hartland	x		x		x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x			x
Muskego	x	x			x
New Berlin	x	x		x	x
North Lake	x		x		x
Oconomowoc	x	x			x
Pewaukee	x	x			x
Sussex	x	x	x	x	x
Waukesha	x	x	x	x	x

	Large Print Materials	Hearing Loop	Charging Stations	Book Club Kits	Study Room(s)
Big Bend	x		x		
Brookfield	x	x	x	x	x
Butler	x	x	x	x	x
Delafield	x	x	x		x
Eagle	x		x		
Elm Grove	x	x	x		x
Hartland	x		x		
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake	x		x		x
Oconomowoc	x	x	x		x
Pewaukee	x	x	x		x
Sussex	x		x		x
Waukesha	x	x	x	x	x

Appendix E

Glossary of Terms: Library Materials and Services

Art Gallery

Public exhibition space to display artwork, often created and/or provided by local artists.

Book Club Kits

Curated collections of books that patrons can check out in order to host their own book clubs. Multiple copies of each book are available in each kit, often with discussion questions.

Charging Stations

Freestanding powering devices that can be used to charge phones, laptops, and mobile devices.

Curbside Service

Library patrons may place a hold on library materials to pick up at a library. When the materials are ready, the patron is able to arrange to have them brought out to their vehicle or placed outside for easy pickup.

Devices for Checkout

Technical devices available for checkout. Examples include laptops, GPS devices, tablets, and e-readers.

Experience/Explore Passes

Offer free admission for individuals or groups to local and regional attractions such as museums, the zoo, and the Mitchel Park Domes.

Group Tech Training

Formal librarian-led classes providing information and hands-on practice to improve patron skill level with technical devices such as tablets and computers; computer software such as Microsoft Word; and Internet use, such as social media and online searching.

Hearing Loop

An Assistive Listening System that transfers sound- from a microphone or TV- directly to a hearing device or cochlear implant, via a tiny telecoil (t-coil) receiver, allowing those with hearing issues to hear and participate in library programs and interactions with staff and presenters. Hearing loops are available in library meeting rooms and/or customer help desks at designated libraries.

Home Delivery

Delivery of library materials to individual homes, as well as senior living facilities and nursing homes.

Makerspace/3D Printer

Creative gathering space with tools and equipment so patrons can engage in creative projects. Makerspaces may include 3D printers, sewing machines, video recording equipment, scrapbooking materials, robotics, and coding software.

Library of Things

A collection of objects available for checkout. Possible items include tools, recreational equipment, toys, games, science kits, or musical instruments.

Online Databases

Online access to collections of information on a variety of topics. Examples include AncestryLibrary, Consumer Reports, JobNow, Morningstar Investment Research Center, and Rosetta Stone. Accessible to library patrons within and outside the library.

Online Training Courses

Over 300 instructor-led, online classes through the Gale Courses product. Courses offer learning opportunities for professional development, technology skills, and personal enrichment. Accessible to library patrons within and outside the library.

Outdoor Space

Accessible outdoor areas, such as gardens, courtyards, and/or outdoor seating, for patron use and library programming.

Outreach Services

Engaging with the community through library programming, collections, and services outside of the library. Examples include attending community events such as farmer's markets and festivals; presenting at meetings of local organizations; and bringing programming to schools and senior living facilities.

STEM lab

A designated space for children's activities designed to promote Science, Technology, Engineering, and Math (STEM) through access to STEM-based tools and activities.

Warming/cooling shelter

Official, county-designated safe spaces where the public can stay to warm up or cool down during inclement weather. Waukesha County Emergency Management directs and refers people to these sites during weather emergencies.

Wi-Fi Hotspots

Portable wireless access points providing network and/or Internet access to mobile devices. Available for checkout to provide patrons with wireless access if it is otherwise unavailable.



Verified!

I. GENERAL INFORMATION

The General Information section requests basic information about the library's public service outlets. Some fields are pre-filled with last year's information. In other cases, last year's response is displayed to the right of the data entry field. Please revise as needed.

FSCS ID	WI0218
1. Name of Library ✓	New Berlin Public Library
2. Public Library System ✓	Bridges Library System
3a. Salutation	Ms.
3b. Head Librarian First Name	Natalie
3c. Head Librarian Last Name	Beacom
4a. Certification Grade	Grade 1
4b. Certification Grade Type	Regular
5. Certification Expiration Date	06/01/2026

Address(es)

Enter the complete street address of the main library. This should be the location where the principal collections are kept. The current address is displayed. Do not make any changes or edits unless the location of the library has changed during the report year, in which case you must also provide an explanation in the notes () for the address field. Use standard postal abbreviations, such as "St." instead of "Street" and "W." instead of "West."

Street address is required. If mailing and street address are the same, then leave mailing address, city, and ZIP blank.

	a. Street Address	b. Mailing Address
6. Address or PO Box #	✓ 15105 Library Ln.	✓ 15105 Library Ln.
7. City/Village/Town	✓ New Berlin	✓ New Berlin
8. ZIP Code	✓ 53151	53151
8 (part 2). ZIP+4 Code	5280	5280

9. County ✓	Waukesha
10. Library Phone No. ✓	(262) 785-4980
11. Fax No.	(262) 785-4984
12. Director's Library E-mail Address	nbeacom@newberlinlibrary.org
13. Library Website URL	http://www.newberlinlibrary.org

Service Outlets

14. Number of Branches (only if applicable) ✓	0
15. No. of Bookmobiles Owned ✓	0
16. No. of Other Public Service Outlets	0
Total # of Service Outlets	1
17. Does your library operate a Books-by-mail program?	Yes No

18. Is your library formally established as a Joint Library under s.43.53 ✓	Yes No
--	--------

Hours of Operation

All libraries complete items 19a through 19d. If your library has a bookmobile or branches, complete 19a through 19d for the main / central library only. Service hours for bookmobiles and branches are entered in Section Ib. Outlet Information.

Report the number of hours opened per week and the number of weeks operating in a modified Hours of Operation table. The table includes three different service levels to report hours opened with no restrictions on building access, limited public access, and staff only access to the building. These service levels are defined in the Annual Report Instructions PDF. The standard breakout of "winter hours" and "summer hours" still applies. Libraries with branch locations will complete this breakout for the central library in Section I Item 19 and each branch location in Section Ib.

Values entered for 19a-d are used to calculate the number of weeks operating at each service level and the number of hours operating during the calendar year. Those values are calculated as 19e Total Weeks and 19f Total Hours.

	Standard Service with No Restrictions on Building Access		Limited Service		Staff Only (no interior service for the public)	
19a. Winter hours open per week	✓ 67	67	0	0	0	0
19b. Number of Winter Weeks	✓ 40	40	0	0	0	0
19c. Summer hours open per week	✓ 64	64	0	0	0	0
19d. Number of Summer Weeks	12	12	0	0	0	0
19e. Total Weeks per Year	✓ 52	52	✓ 0	0	✓ 0	0
19f. Total Hours per year for this location	3,448	3,448	0	0	0	0

20. Square Footage of Public Library (this location only) ✓	55,117
21a. Did your library or a branch move to a new facility during the report year?	Yes No
21b. Did your library or a branch renovate or expand an existing facility during the report year?	Yes No
22. UEI Number	NUNZCR5CMVR5

II. LIBRARY COLLECTION

This section of the report collects data about selected types of materials. It does not cover all types of material. Report only items that have been purchased, leased, or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where the item is available for their use.

For electronic content, do not consider resources available for free in the public domain. Do not include resources provided by BadgerLink. Note: The number of electronic units are no longer reported and are replaced by a set of Yes / No questions regarding patron access to electronic content by purchasing authority.

Physical Collection

Physical units are volumes, items, or pieces. Items that are packaged together as a unit and are generally checked out as a unit should be reported as one physical unit; e.g., two music CDs, several audio CDs for one recorded book, or two DVDs.

A Mixed media print and audio set, including children's book/CD kits and Wonderbooks, should be reported as a Book in Print and count as a single item regardless of the number of books and CDs. If a set contains a printed book accompanied by a game CD, then report the set as a Book in Print. A stand-alone game should be reported as in Other Materials Owned.

1a. Books in Print (end of year total) ✓	119,299	122,111
1b. Books in Print Added During Year	6,203	6,101
2. Physical Subscriptions ✓	115	118
3a. Physical Audio Materials (end-of-year total) ✓	9,787	10,895
3b. Physical Audio Added During Year	173	224
4a. Physical Video Materials ✓	10,720	10,943
4b. Physical Video Added During Year	381	504
5a. Other Physical Materials Owned ✓	1,683	1,569
5b. Other Physical Material Description	Kits, Equipment, Library of Things, Video Games, Library of "Things" Collection, STEM Kits, Hot Spots, Experience Passes	
6. Total Physical Items in Collection ✓	141,489	145,518

Electronic Collection

7a. Did the library provide access to e-books purchased solely by the library?	Yes No
7b. Did the library provide access to e-books purchased via a system, consortium, or cooperative agreement?	Yes No
8a. Did the library provide access to e-serials purchased solely by the library?	Yes No
8b. Did the library provide access to e-serials purchased via a system, consortium, or cooperative agreement?	Yes No
9a. Did the library provide access to e-audio purchased solely by the library?	Yes No
9b. Did the library provide access to e-audio purchased via a system, consortium, or cooperative agreement?	Yes No
10a. Did the library provide access to e-video purchased solely by the library?	Yes No
10b. Did the library provide access to e-video purchased via a system, consortium, or cooperative agreement?	Yes No
11a. Did the library provide access to research databases purchased solely by the library?	Yes No
11b. Did the library provide access to research databases purchased via a system, consortium, or cooperative agreement?	Yes No
12a. Did the library provide access to online learning platforms purchased solely by the library?	Yes No
12b. Did the library provide access to online learning platforms purchased via a system, consortium, or cooperative agreement?	Yes No

Research Databases and Online Learning Platforms

13. For Research Database and Online Platform resources purchased by the library, enter the resource type, the vendor name, and resource name. Do not include e-book, e-serial, e-audio, or e-video materials.

3	3	3	
Resource Type	Vendor	Resource	
Research Database	Value Line, Inc	Value Line	
Online Learning Platform	Perpetual Learning	Library Speakers Consortium (LSC)	
Research Database	NewsBank, Inc.	NewsBank	

III. LIBRARY SERVICES

Physical Circulation Transactions

A physical circulation transaction is the act of loaning materials at a library or bookmobile in all formats for use outside the library. This activity includes checking out physical materials to users, either manually or through a self-checkout system, and renewing materials, each of which is reported as a circulation transaction. Include items circulated from all library units (e.g., main library, branches, bookmobiles, and book-by-mail programs) administered by the library board.

Interlibrary loan (ILL) items provided to the library and checked out by the library to a library user should be reported here as a circulation. Do not include ILL items sent to another library.

1a. Total Physical Circulation ✓	386,156	366,422
1b. Circulation of Children's Physical Materials (subset of 1a.) ✓	199,249	187,321
1c. Circulation of Other Physical Items (subset of 1a.) ✓	19,440	16,059

Interlibrary Loan (ILL) Transactions

Please choose *either* "Categorized ILL Transactions" *or* "Total ILL Transactions" and fill in the details requested. Do not report values for both. To change the Method for Counting ILL, all responses in the section must be removed first to avoid duplication of counts.

Method for Counting Interlibrary Loan (ILL) Transactions	Categorized ILL Transactions	
Total Items Loaned (provided to) ✓	43,882	45,028
Total Items Received (borrowed from) ✓	51,306	48,993

Categorized Interlibrary Loan (ILL) Transactions

	Items Loaned To Other Libraries		Items Borrowed From Other Libraries	
Integrated Library System (ILS)	42,550	43,673	51,083	48,676
WISCAT	1,332	1,355	223	317
Other (Includes OCLC, manual tracking, or other methods)	0	0	0	0

Electronic Content Circulation Transactions

Review [Defining Electronic Content Circulation](#) to determine whether an item should be included in circulation statistics. The content category definitions are found in the collection section above.

3a. E-book Circulation ✓	34,515	31,318
3b. E-serial Circulation ✓	11,078	7,753
3c. E-audio Circulation ✓	43,864	38,528
3d. E-video Circulation ✓	515	665
3e. Circulation of Children's Electronic Materials	4,974	4,885
3f. Total Circulation of Electronic Materials ✓	89,972	78,264

Users / Use

4a. Registered Users Resident	16,000	14,822
4b. Registered Users Nonresident	980	755
4c. Registered Users ✓	16,980	15,577
5a. Overdue Fine Policy ✓	Yes Yes	
5b. Automatic Renewal Policy	No No	
6a. Method Used to Count Reference Transactions ✓	Survey Week(s) Survey Week(s)	
6b. Reference Transactions ✓	49,972	
7a. Method Used to Count Library Visits ✓	Actual Count	Actual Count
7b. Library Visits ✓	220,642	195,421
8a. Number of Public Use Computers	22	22
8b. Number of Public Use Computers with Internet Access ✓	22	22
8c. Method for Counting Uses of Public Internet Computers	Actual Count	Actual Count
8d. Number of Uses (sessions) of Public Internet Computers ✓	8,391	8,077
9a. Method for Counting Wireless Internet Uses	-1Did Not Collect	
9b. Wireless Internet Uses ✓		

Library Programs and Attendance

Libraries are expected to report the number of programs for five age groups in four categories: [1] in-person on-site programs, [2] in-person off-site programs, [3] live, virtual programs, and [4] pre-recorded programs. Attendance is expected for [1] in-person on-site programs, [2] in-person off-site programs, and [3] live, virtual programs. Recorded views within 30 days of posting is expected for [4] pre-recorded programs.

Exclude library activities delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, resume writing assistance, homework assistance, and mentoring activities. Exclude self-directed activities.

Resource. [Training materials](#) are available for defining programs and self-directed activities, counting attendees and views of recorded presentation, and categorizing programs as in-person or live, virtual.

If your library does not offer a program category or an age group, a zero must be entered for the program, attendance, and recorded view counts. The 'Not available' checkbox is used only when program category and age group pair was offered but the count is not available.

Number of Programs

	10. In-Person On-Site Programs		11. In-Person Off-Site Programs		12. Live, Virtual Programs		13. Pre-recorded Programs	
a. Young Children (0-5)	278	218	1	3	0	0	0	0
b. Children (6-11)	74	65	13	11	0	0	0	0
c. Young Adult (12-18)	13	18	0	2	0	0	0	0
d. Adult (19+)	181	109	14	0	10	1	10	0
e. General Interest	37	29	3	4	1	0	1	0

Attendance and Views

	14. In-Person On-Site Attendance		15. In-Person Off-Site Attendance		16. Live, Virtual Attendance		17. Pre-recorded Program Views	
a. Young Children (0-5)	5,665	4,307	19	57	0	0	0	0
b. Children (6-11)	1,382	1,433	1,566	1,449	0	0	0	0
c. Young Adult (12-18)	209	243	0	26	0	0	0	0
d. Adult (19+)	3,023	2,251	171	0	66	24	235	0
e. General Interest	3,529	2,575	2,500	2,535	2	0	18	0

Total In-Person and Live, Virtual Statistics by Age

Total Synchronous Program Statistics by Age

	Young Child (0-5)		Child (6-11)		Young Adult (12-18)		Adult (19+)		General Interest	
Number of Programs	✓ 279	221	✓ 87	76	✓ 13	20	✓ 205	110	✓ 41	33
Total Program Attendance	✓ 5,684	4,364	✓ 2,948	2,882	✓ 209	269	✓ 3,260	2,275	✓ 6,031	5,110

Total Program Statistics by Program Category

Total Synchronous and Asynchronous Program Statistics by Program Category

	In-Person On-Site		In-Person Off-Site		Live, Virtual		Total Synchronous		Pre-recorded	
Number of Programs	583	439	31	20	✓ 11	1	✓ 625	460	✓ 11	0
Total Program Attendance	13,808	10,809	4,256	4,067	✓ 68	24	✓ 18,132	14,900	NA	
Total Program Views	NA		NA		NA		NA		✓ 253	0

Program Descriptions and Platforms

20a. Describe the library's in-person programs:	Storytimes, book clubs, trivia, Read to Rover, sensory programs, craft and art programs, movies, tech talks, art history, adult health and wellness programs, author/speaker programs, Memory Cafes, AP study halls, summer programming, ping pong, themed community events and celebrations, cultural and local history programs, concerts and beer gardens.
20b. Which platforms does the library use to host the library's live, virtual programs:	Library Speakers Consortium Virtual delivered via email
20c. Describe the library's live, virtual programs:	Author talks Virtual trivia
20d. Which platforms does the library use to host the library's pre-recorded programs:	Library Speakers Consortium Facebook, Google
20e. Describe the library's pre-recorded programs:	Author talks Storytimes, book clubs and educational programming.

IV. LIBRARY GOVERNANCE

Provide a complete list of all voting board members and officers as of the date of this report. Enter "Vacant" in the first and last name fields of any positions that are unfilled at the time of this report. Be sure to report the current Library Board President in the first line. If you cannot provide an email address for the President, please provide email addresses for other members when possible for official library system communications.

Library Board President

List the Library Board President as of the date of this report. Please provide an email address as well. If this trustee does not have an email address, please provide an email address for at least one other board member who can be contacted if necessary by the library system or DPI.

	Salutation	First Name	Last Name	Street Address	City	Zip Code	Email Address
President	1.Mr.	John	Marek	15295 Library Lane - #302	New Berlin	53151	2library25@gmail.com

Library Board Members

List other voting members of the library board as of the date of this report. Please be sure to indicate vacancies last.

	Salutation	First Name	Last Name	Street Address	City	Zip Code	Email Address
2.	Ms.	Dolores	Greenawalt	13185 W. Wilbur Dr.	New Berlin	53151	dogreenie@hotmail.com
3.	Ms.	Barb	Uhen	4333 S. Sunnyslope Dr.	New Berlin	53151	barb.uhen@nbexcellence.org
4.	Mr.	Patti	Orzel	15295 Library Lane - #318	New Berlin	53151	orzelpatti@gmail.com
5.	Ms.	Jill	Kawala	13625 W Graham Street	New Berlin	53151	braverhome@gmail.com
6.	Mr.	Nathan	Jung	4555 Heart Ridge Drive	New Berlin	53151	najung@uwalumni.com
7.	Ms.	Ruth	Bock	14852 W Arrowhead Lane	New Berlin	53151	jrb52@wi.rr.com
8.	Ms.	Charolotte	Kroupa	4440 S Hi View Ct.	New Berlin	53146	CharlotteKroupa22@gmail.com
9.	Mr.	Chuck	Garrigues	13750 W. National Ave.	New Berlin	53151	chuck@garrig.com
10.							
11.							
12.							
13.							
14.							

15.						
16.						
17.						

Number of Library Board Members

Report the total number of voting library board members, including vacancies that are authorized but not filled.

Number of Library Board Members ✓	9	9
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V. LIBRARY OPERATING REVENUE

Report revenue used for operating expenditures as defined at the beginning of Section VI. Report revenue by original source of income (federal, state, county, or other). This may require the library ...[more](#)

1. Local Municipal Appropriations for Library Service

Report appropriations from the library's local municipality as applicable. Do not include county appropriations, contract income, or donations here.

Legally established joint public libraries may use subsequent lines of the report as appropriate to report revenue from participating municipalities.

Using the Municipality Type dropdown list, indicate whether the municipality that established the library is a city, village, town, or tribe. In the Name column, enter the name of the city, village, town, or tribe that established the library. Do not include phrases such as City of, Town of, etc. In the Amount column, report the actual appropriation for the report year received from the city, village, town, or tribe that established the library. Legally established joint public libraries may use subsequent lines of the report as appropriate to report revenue from participating municipalities. Do not include funds from municipalities which are not the sole governing municipality or a member of the legally established joint public library.

Municipality Type	Name	Amount
City	New Berlin	\$ \$1,754,876 \$1,757,642
		\$
		\$
		\$
		\$
		\$
		\$
		\$

Subtotal

Local Government Revenue	\$ \$1,754,876	\$1,757,642
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2a. Home County Appropriation for Library Service

Each public library is affiliated with a home county for library system purposes under s.43.15(3). Report reimbursements from the home county here. This includes home county funds transferred to the library through the system or a county library service. Consolidated county libraries report county revenues for library operations.

Home County Subtotal	\$ \$19,490	\$20,516
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2b. Other County Payments for Library Service

Report other county payments for library services from other counties under s. 43.12. in this section. This includes other county funds transferred to the library, including those transferred through the system. Use the dropdown list to select the name of the county. These are county payments other than the home county appropriation reported in 2a.

County Name	Amount
Jefferson	\$ \$381
Dodge	\$ \$57
Washington	\$ \$135
Racine	\$ \$3,177
Walworth	\$ \$184
Ozaukee	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$

Subtotal

Other County Payments	\$ \$3,934	\$4,074
-----------------------	------------	---------

3. State Funds

Report state funds received from your public library system or from another Wisconsin state program and deposited in your library fund. Funds from TEACH grants are reported here as it is funded by the state Universal Service Fund (USF) which is comprised (almost entirely) of state funds.

a. Public Library System State Funds

Your system should verify the amount of state aid to public library systems funds paid to your library (if any). If your library received more than four individual grants, you may combine grants from the same source on one line, then list the individual projects in the notes. Revenue reported here should not be reported as contract income or as funds not expended in the previous year.

Payments or reimbursements for system LSTA Grants should only be reported in Section V. 4. Federal Funds.

If state funds were expended or budgeted for capital outlays such as major equipment purchases, the funds should only be reported in Section VII. Library Capital Income, Expenditures, Debt Retirement, and Rent.

Description	Amount
-------------	--------

Google Tours	\$ 2,090
Innovation Grant	\$ 3,500
Adult Program Grant	\$ 438
eContent Grant	\$ 4,729

b. State Funds Carried Forward from Previous Year

Report any State Funds received in a prior year and carried forward and expended in the reporting year.

State Funds Carried Forward	\$ 0	\$ 0
-----------------------------	------	------

c. Other State Funded Program

Enter a brief description of other state-funded programs and enter the total amount. Note: programs like Youth Aid Funds are reported here although the state funds are blended with federal funds. State statutes and federal regulations authorize state agencies to blend state aid with federal funds to focus on outcomes and simplify accounting. When the funds get blended, the funds are combined under a single set of reporting requirements and lose their original award-specific identity.

Description	Amount
	\$ 0

Subtotal

State Government Revenue ✓	\$ 10,757	\$ 11,766
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4. Federal Funds - Name of program and, if LSTA, enter DPI Grant Number number

Federal funds are any federal government funds distributed to the library for expenditure by the public library, including federal funds distributed by the state. Enter the name of the federal program(s) and the amount(s) received.

Report Library Services and Technology Act (LSTA) grant awards to your library here. For each award, enter the "DPI Grant Number" including Grant Year as the Project Number and "DPI Grant Name" as the Program Name. LSTA grant awards to systems that are used to reimburse your library for expenses or are otherwise passed through to your library should also be reported here. Report Community Development Block Grants here.

If federal funds were expended or budgeted for capital outlays, such as major equipment purchases, the funds should only be reported in Section VII. Library Capital Income, Expenditures, Debt Retirement, and Rent.

Program Name	Project Number	Amount
East Asia in the Upper Midwest Program		\$ 300
Flight Path Science @ My Library Program		\$ 500
SEWI LSTA Grant - Prairie Lakes		\$ 1,000
		\$

Subtotal

Federal Government Revenue ✓	\$ 1,800	\$ 747
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5. Contract Income from Other Governmental Units, Libraries, Library Agencies, Library Systems, etc.

Contract income is income received from government units, libraries, and library systems other than your system for services provided by the library. State and federal funds received from your system should be reported as state or federal income above. Report funds received from adjacent towns or municipalities which are not part of a formal joint library operating agreement.

If the contract funds are not paid directly to the library board, but are instead paid to the library's municipality, and are not available as revenue to the library in addition to the municipal appropriation for library service, do not report those revenues here. Do not report reimbursement payments from counties here. Do not report federal Library Service and Technology Act (LSTA) grants received from the state or system, or state funds from your public library system as contract income here.

Name	Amount
	\$ 0
	\$
	\$
	\$

Subtotal

Contract Income	\$ 0	\$ 0
-----------------	------	------

6. Funds Carried Forward from Prior Year

Include funds carried forward from the previous year and made available for library operating expenditures, except for state aid funds reported in 3b. above. Other funds carried forward and expended are reported in 6a. Other funds carried forward and earmarked for expenditure in a future calendar year are reported in 6b are excluded from Total Operating Income (Total Revenue). Do not duplicate funds in 6a and 6b.

Do not report fund balances designated to capital projects here. Donation and endowment fund balances should not be reported here but instead should be reported as part of VIII. Other Funds Held by the Library Board and IX. Funds Paid or Transferred to the Library Board Financial Secretary.

6a. Other Funds Carried Forward and Expended	\$ 0	
6b. Other Funds Carried Forward for Future Expenditure	\$ 0	\$ 0

7. All Other Operating Income

All other operating income is any operating income other than that reported in items 1 through 6 above. Report monetary gifts, donations, interest, fines, and fees received during the reporting year here if the funds were available for library use. Do not include the value of any contributed services

or the value of in-kind gifts and donations. Do not include endowment and trust funds that were not available to the library for expenditure during the report year. Those funds should be reported as part of VIII. Other Funds Held by the Library Board and IX. Funds Paid or Transferred to the Library Board Financial Secretary.

Other Revenue ✓	\$ \$62,744	\$85,780
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8. Total Operating Income

Total Operating Income is the sum of items 1 through 7 and is automatically calculated and displayed.

Total Revenue ✓	\$ \$1,853,601	\$1,880,525
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9. Current Year Appropriation

Enter the current year appropriation provided by your governing body/bodies for public library service. This is the amount you anticipate reporting next year on line 1 above if yours is a municipal library, or on line 2 if yours is a county library. Joint libraries should enter their total and use the annotation field to report a listing of appropriations from each participating municipality.

Current Year Appropriation ✓	\$ \$1,793,370	\$1,754,876
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10. Exempt from County Library Tax? [Wis. Stat. s.43.64 (2)]

Indicate whether your library's municipality was exempt from the county library tax for the reporting year. Wisconsin Statutes 43.64(2). If the county has no library tax, then select Not Applicable. Exemption from County Library Tax must be determined annually by your governing municipality or county. Contact your governing municipal or county clerk, if you have not received this information for the reporting year.

Exempt from County Library Tax ✓	Yes
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VI. LIBRARY OPERATING EXPENDITURES

Operating expenditures are current and recurrent costs necessary to the provision of library service. Library operating costs paid directly by the municipality may be included as income and expenditures; however, the library must be able to document the expenditure of these funds for library purposes. (For example, employee fringe benefits or library heating and electrical expenses in a shared facility may be paid directly by the municipality. If documented, these expenditures may be included.) Do not include the value of any contributed or in-kind services or the value of any non-monetary gifts and donation, or rent paid by the library to library's municipality for public library space. Do not include capital expenditures under this category (see instructions for the immediately following section).

1. Salaries and Wages ✓	\$ \$967,418	\$949,520
2. Employee Benefits ✓	\$ \$250,026	\$217,599
Total Staff Expenditures ✓	\$1,217,444	\$1,167,119

3. Library Collection Expenditures

Enter all operating expenditures from the library budget for all materials in print, microform, electronic, and other formats considered part of the collection, whether purchased, leased, or licensed. Exclude charges or fees for interlibrary loans and expenditures for document delivery.

a. Print Materials ✓	\$ \$157,334	\$175,389
b. Electronic Content ✓	\$ \$19,643	\$9,035
c. Audiovisual Materials	\$ \$18,864	\$21,871
d. All Other Library Materials	\$ \$18,466	\$30,526
Subtotal 3: Total Collection Expenditures ✓	\$ \$214,307	\$236,821

4. Fees and Contracts for Services from Other Libraries, Municipalities, and Systems

Report here any expenditure for contract arrangements with other libraries, municipalities, or public library systems or fees imposed by a municipality. Funds reported here are the funds paid out by your library. Indicate the service provider receiving the funds, description of service, amount, and type as contract or fee. A contract is a negotiated agreement while a fee is a monetary amount imposed upon the library. Select either Fee or Contract Type for each entry.

Provider	Description	Amount	Type
Bridges Library System	CAFE Annual Costs	\$ \$36,463	Fee Contract
Bridges Library System	Electronic Content	\$ \$10,203	Fee Contract
Bridges Library System	Cooperative Purchases	\$ \$4,384	Fee Contract
Bridges Library System	Digital Content Buying Pool	\$ \$6,574	Fee Contract
		\$	Fee Contract
		\$	Fee Contract
		\$	Fee Contract
		\$	Fee Contract
		\$	Fee Contract
		\$	Fee Contract
		\$	Fee Contract
		\$	Fee Contract

Subtotal 4: Total Contracted	\$ \$57,624	\$54,858
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5. Other Operating Expenditures

Report all operating expenditures not included in 1 through 4 above. Other operating expenditures include operation and maintenance of the physical facility, heating, lighting, postage, telephone, telecommunication charges, binding, supplies, repair or replacement of existing furnishings, fees paid to a consultant, auditor, architect, or attorney, and equipment and cost of computer hardware and software used to support library operation or to link to external networks, including the Internet.

5. Other Operating Expenditures	\$ \$274,532	\$363,983
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6. Total Operating Expenditures

Total Operating Expenditures ✓	\$ \$1,763,907	\$1,822,781
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7. Operating Expenditures from Federal Sources

Report the amount expended from federal program sources. If the library is reimbursed for operating expenditures by a federal program such as E-rate. LSTA Grants to States, expenditures from federal sources must not be zero. The criteria for reporting the LSTA grant amount is the year in which the funds were expended and not the year in which reimbursement was received. The number is a subset of the total reported in 6.

7. Of the expenditures reported on line 6, report the amount expended from federal program sources.	\$ \$1,800	\$747
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VII. LIBRARY CAPITAL REVENUE, EXPENDITURES, DEBT RETIREMENT, AND RENT

1. Capital Income & Expenditures

Enter capital revenues and capital expenditures by source of revenue for the year just ended. Report all revenue to be used for major capital expenditures and all capital expenditures. Include funds received for (a) Site acquisition, (b) New buildings, (c) Additions to or renovation of library buildings, (d) Furnishings, equipment, and initial collection (print, non-print, and electronic) for new buildings, building additions, or building renovations, (e) Computer hardware and software used to support library operations, to link to networks, or to run information products, (f) New vehicles, and (g) Other one-time major projects.

Exclude funds received for (a) Replacement and repair of existing furnishings and equipment, (b) Regular purchase of library materials, (c) Investments for capital appreciation, (d) Capital projects in the previous year but unspent in the report year.

Select whether the expenditures are identified as Capital based on the IMLS Public Libraries Survey definition or a local definition such as municipal or county. If the origin of the definition is unknown, select 'Unsure.'

	Brief Description of Expenditure(s)	Revenue(s)	Expenditure(s)
a. Federal		✓ \$ \$0	\$ \$0
b. State		✓ \$ \$0	\$ \$0
c. Municipal		\$ \$0	\$ \$0
d. County		\$ \$0	\$ \$0
e. Other		✓ \$ \$0	\$ \$0
f. Definition	IMLS Public Libraries Survey Local, municipality or county Unsure		

Totals

Total Income and Total Expenditure are the sum of the revenue column and expenditure column, respectively. The two amounts are automatically calculated and displayed.

Total Income ✓	\$ \$0	\$0
Total Expenditure ✓	\$ \$0	\$0

2. Debt Retirement

Enter debt retirement payments, if any, paid by the library board. Include annual payments and interest. Also Include additional debt retirement fees, if any, incurred in the year of final payoff of the debt. If available, please add a note with a breakdown of amounts and corresponding sources.

Debt Retirement	\$20,542	\$0
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3. Rent paid to Municipality/County

Enter rent paid to the library's municipality by the library, or to the county if a county library, for public library space provided by the municipality or county.

Rent Paid to Municipality/County	\$0	\$0
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VIII. OTHER FUNDS HELD BY THE LIBRARY BOARD

All funds under the library board's control must be reported as required by Wis. Stat. s.43.58 (6) (a). Report in this section any funds held by the library board that have not been reported in a [...more](#)

Beginning Balance of Other Funds Under Library Board Control	\$25,141	\$22,649
Additions	\$0	\$0
Subtractions	\$0	\$0
Total Amount of Other Funds at End of Year	\$25,141	

IX. FUNDS PAID OR TRANSFERRED TO THE LIBRARY BOARD FINANCIAL SECRETARY

Report the total amount of funds held at end of year in the space provided. Funds balances submitted in this section indicate that a library trustee has been appointed as financial secretary and [...more](#)

Beginning Balance of Section IX Funds	-1	\$0 No Section IX Funds
Additions		\$0
Subtractions		\$0
Total Amount of Section IX Funds	\$0	\$0

X. STAFF (FTE)

Report as of the last day of the year just ended. Indicate all positions funded in the library's budget whether those positions were filled or not. Do not list volunteers or staff paid from funds ...[more](#)

1. Personnel Listing

a. Directors, department heads, branch heads, and full-time or permanent staff, as space allows.

Librarians are persons who do paid work that usually requires professional training and skills in the theoretical or scientific aspects of library work, or both, as distinct from its mechanical or ...[more](#)

Position	Type of Staff	Job Title	Years Experience	Annual Salary	Hrs Worked/Yr	FTE	Benefits?	Paid Leave?	Exempt?
Library Director	Librn. MLS (ALA)	Library Director / Chief Officer	21+ years	\$ \$117,375	2,080.00	1.00	Yes	Yes	Yes
Public Services Manager	Other no-MLS	Department Head / Coordinator / Senior Manager	11 to 20 years	\$ \$77,158	2,080.00	1.00	Yes	Yes	Yes
Library Services Manager	Librn. MLS (ALA)	Department Head / Coordinator / Senior Manager	21+ years	\$ \$88,637	2,080.00	1.00	Yes	Yes	Yes
Adult Services Librarian-Lead	Librn. MLS (ALA)	Department Head / Coordinator / Senior Manager	6 to 10 years	\$ \$68,640	2,080.00	1.00	Yes	Yes	Yes
Youth Services Librarian-Lead	Librn. MLS (ALA)	Department Head / Coordinator / Senior Manager	6 to 10 years	\$ \$68,640	2,080.00	1.00	Yes	Yes	Yes
Adult Services Librarian	Librn. MLS (ALA)	Librarian (MLS)	3 to 5 years	\$ \$60,528	2,080.00	1.00	Yes	Yes	Yes
Youth Services Librarian	Librn. MLS (ALA)	Librarian (MLS)	3 to 5 years	\$ \$64,584	2,080.00	1.00	Yes	Yes	Yes
Youth Services Librarian	Librn. MLS (ALA)	Librarian (MLS)	3 to 5 years	\$ \$44,639	1,534.00	0.74	Yes	Yes	No
Adult Services Librarian	Librn. MLS (ALA)	Librarian (MLS)	3 to 5 years	\$ \$44,639	1,534.00	0.74	Yes	Yes	No
Youth Services Librarian	Librn. MLS (ALA)	Librarian (MLS)	3 to 5 years	\$ \$30,264	1,066.00	0.51	No	Yes	No
Adult Services Librarian	Librn. MLS (ALA)	Librarian (MLS)	3 to 5 years	\$ \$30,264	1,066.00	0.51	No	Yes	No
Substitute Librarian	Librn. MLS (ALA)	Librarian (MLS)	6 to 10 years	\$ \$9,490	520.00	0.25	No	No	No
Substitute Librarian	Librn. MLS (ALA)	Librarian (MLS)	6 to 10 years	\$ \$9,490	520.00	0.25	No	No	No
Library Reference Intern-Youth	Other no-MLS	Associate Librarian (non-MLS)	Less than 3 years	\$ \$16,213	1,040.00	0.50	No	No	No
Library Reference Intern-Adult	Other no-MLS	Associate Librarian (non-MLS)	Less than 3 years	\$ \$16,213	1,040.00	0.50	No	No	No
				\$					
				\$					
				\$					
				\$					
				\$					

b. Other Paid Staff

Libraries should complete this section to include staff not reported in 1a. Report the requested information for as many position classifications as space allows, beginning with those classifications with the most hours worked in a week.

For each personnel listing enter the Position (local title), Type of Staff, Job Title, Annual Salary or Wages, Hours Worked per Year, FTE, Benefits Eligible? Paid Leave Eligible? And Exempt?. Select the Job Title from Appendix A descriptions to identify the closest match based on duties and responsibilities. If no match can be identified, supply an explanation in the notes.

Type of Staff: Librn. MLS (ALA); Librn. no-MLS; Other MLS (ALA); Other no-MLS

Years Experience (median): Less than 3 years; 3 to 5 years; 6 to 10 years; 11 to 20 years; 21+ years

Exempt?: either exempt status applies or the employee is salaried and not entitled to overtime pay

The full time equivalent (FTE) for any staff category is determined by summing the total hours worked per year by all employees included in that row and dividing by 2080. To ensure comparable data, 2080 hours per year (40 hours x 52 weeks) is the measure of full-time employment.

DO NOT INCLUDE names in the notes.

Position	Type of Staff	Job Title	Years Experience	Annual Wages	Hrs Worked/Yr	FTE	Benefits?	Paid Leave?	Exempt?
Office Coordinator	Other no-MLS	Office Manager	6 to 10 years	\$ \$42,399	1,534.00	0.74	Yes	Yes	No
Circulation Aide-Lead	Other no-MLS	Clerk - Public Services	6 to 10 years	\$ \$28,104	1,248.00	0.60	Yes	Yes	No
Circulation Aides (11)	Other no-MLS	Clerk - Public Services	6 to 10 years	\$ \$19,812	1,040.00	0.50	No	Yes	No
Library Pages (5)	Other no-MLS	Page/Shelver	3 to 5 years	\$ \$7,488	624.00	0.30	No	No	No
				\$					
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2. Library Staff Full-Time Equivalents (FTEs)

Compiling information for all library staff is particularly important for large libraries that did not report all employees in 1a. and 1b. above. The full time equivalent (FTE) for any staff category is determined by summing the total hours worked per week by all category employees and dividing by 40. To ensure comparable data, 40 hours per week is the measure of full-time employment. For example, if a library has 15 employees working 37.5 hours per week each, then the FTE calculation is 15 x 37.5 / 40 or 14.06 FTEs. Round to two decimal places.

Do not include any employee in more than one category.

a. Persons Holding the Title of Librarian

For all employees with Master's degrees from programs accredited by ALA, divide the total hours worked per week by 40. For all other persons holding the title of Librarian, divide the total hours worked per week by 40.

The FTE subtotal for persons holding the title of librarian is the sum of the two calculations above. The number is automatically calculated and displayed.

Masters Degree from an ALA Accredited Program ✓	8.90	8.90
Other Persons Holding the Title of Librarian	1.00	1.00
Subtotal ✓	9.90	9.90

b. All Other Paid Staff

Determine the total hours worked per week by all other staff paid from the library budget. Include plant operation, security, and maintenance staff. Divide this number by 40 and enter the all other paid staff full time equivalent in the space provided.

All Other Paid Employees ✓	9.54	10.00
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c. Total Library Staff Full-Time Equivalents

The total library staff full time equivalent is the sum of the FTEs reported in 2a and 2b and is automatically calculated and displayed.

Total Paid Employees ✓	19.44	19.90
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XI. LOANS TO NONRESIDENTS

Nonresidents are library users who live outside the library's legal service jurisdiction (the governmental unit(s) establishing the public library). For consolidated county libraries, it means outside the county. For joint libraries, it means outside the municipalities that established the joint library.

Provide the requested information for items 1 through 9. The information provided in 2b. Circulation to Nonresidents Living in Your County – Those Without a Library is needed to calculate county payments for nonresident use of the library. For those libraries in communities with territory in more than one county, report nonresident use for your home county only in 2b. Report other county nonresident use in item 3 or 4 and 9, as appropriate.

For more information, see [Guidelines for Collection of Public Library Nonresident Usage Statistics](#).

1. Total Nonresident Circulation ✓	77,205	63,228
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2. Circulation to Nonresidents Living in Your County

a. Home County Circulation to Those with a Library	37,026	33,270
b. Home County Circulation to Those without a Library	10,630	7,609
c. Home County Total	47,656	40,879

3. Circulation to Nonresidents Living in Another County in Your System

a. Other System Counties Circulation to Those with a Library	179	153
b. Other System Counties Circulation to Those without a Library	86	195
c. Other System Counties Total	265	348

4. Circulation to Nonresidents Living in an Adjacent County Not in Your System

a. Nonsystem Adjacent County Circulation to Those with a Library	28,335	20,744
b. Nonsystem Adjacent County Circulation to Those without a Library	760	1,020
c. Nonsystem Adjacent County Total	29,095	21,764

Other

5. Other Circulation to All Other State Residents	122	181
6. Other Circulation to Users from Out of State	67	56
7. Method for Determining Circulation Allocation	Actual	
8a. Access Denied under s. 43.17 (11) (b)	No	
8b. If Access Denied, Are Cards Sold		

9. Circulation to Nonresidents

Report the circulation to nonresidents from any adjacent counties who do not have a local public library and the name of the county. Information provided on lines 9a. through 9j. is needed to calculate adjacent county payments for nonresident use of the library where applicable.

Use the dropdown lists to indicate the county reported and enter the total number of circulations to qualifying non-residents from that county who used your library throughout the report year. County names may be prefilled with those listed in the annual report.

Name of County	Circulation	
Dodge Dodge	35	47
Washington Washington	55	51
Racine Racine	575	691
Walworth Walworth	95	231
Jefferson Jefferson	86	195
Ozaukee Ozaukee	0	0

XII. TECHNOLOGY

Wireless Internet Access and Broadband

1. What is the speed of your connection to the internet? Choose the closest value.	100MB	100MB
2. At times of peak use, is the bandwidth of the library sufficient for patrons and staff?	Yes	No Yes
3a. How many hotspots does your library have in the collection for patron checkout? Do not include lost devices.	20	19
3b. How many internet-ready devices does your library have in the collection for patron checkout? Do not include lost devices.	3	0
4. Does your library provide external wireless access on the library grounds or from a mobile unit such a bookmobile?	Yes	No No
5. Does your library filter every library-owned computer for obscene content (including staff computers) and have a board-approved internet safety policy?	Yes	No No

Digital Literacy

The American Library Association defines "Digital Literacy" as: The ability to use information and communication technologies to find, evaluate, create, and communicate information, requiring both cognitive and technical skills.

6a. Does your library offer courses, training, or other kinds of assistance to support your patrons' digital literacy?	Yes	No
6b. If your library answered yes for 6a, provide a list of your offerings and add any that are new since last year.	Tech-Talks, Book- A-Librarian, guided walk-through	

XIII. SELF-DIRECTED ACTIVITIES, STAFF SERVING YOUTH, AND STAFF SERVING ADULTS

For a complete description of self-directed activities information in the annual report, see the WI Libraries for Everyone post "Important Updates: Annual Report and Record Keeping Resources." ...[more](#)

1. Self-Directed Activities

Please indicate the name and e-mail address of one paid staff member who is primarily responsible for the services to services and programs to people aged 19 and up. If the director serves in this capacity, only that name is needed.

	Number of Self-directed Activities		Participation in Self-directed Activities	
Young Children (0-5)	18	23	✓ 2,717	3,161
Children (6-11)	15	11	✓ 3,183	2,216
Young Adult (12-18)	12	12	✓ 182	194
Adult (19+)	21	13	✓ 677	601
General Interest	33	23	✓ 19,611	14,095
Total Self-directed	99		26,370	

2. Staff Serving Youth

Please indicate the name and e-mail address of one paid staff member who is primarily responsible for the services to children, youth, and teens. This staff member may be the Director.

1	1	1	
<u>First Name</u>	<u>Last Name</u>	<u>Email Address</u>	
Kate	Krause-Blaha	kkrause-blaha@newberlinlibrary.org	

3. Staff Serving Adults

Please indicate the name and e-mail address of one paid staff member who is primarily responsible for the services to services and programs to people aged 19 and up. If the director serves in this capacity, only that name is needed.

1	1	1	
<u>First Name</u>	<u>Last Name</u>	<u>Email Address</u>	
Jessica	Madey	jmadey@newberlinlibrary.org	1
			1

XIV. ASSURANCE OF COMPLIANCE (select Yes to indicate compliance)

[Note to user: You may click on each question below to view the entire statement of assurance as it will appear on the printed document.]

We assure the Public Library System of which this library is a member and the Division for Libraries and Technology, Department of Public Instruction that this public library is in compliance with the following requirements for public library system membership as listed in Wis. Stats.

Selecting "Yes" from the dropdown list next to each statement of assurance indicates compliance with the requirement.

Is the library established under s. 43.52,3, or 7? ✓	Yes	No
Is the library free for the use of inhabitants? ✓	Yes	No
Does the library's board membership comply with statutory requirements? ✓	Yes	No
Does the library board have exclusive control of funds? ✓	Yes	No
Is the library director present at least 10 hours per week while the library is open? ✓	Yes	No
Does the library board supervise the administration of the library? ✓	Yes	No

Is the library authorized to participate in your library system? ✓	Yes No
Has the library maintained a written agreement to participate in the library system, interlibrary loan (ILL), and provide "same services"? ✓	Yes No
Is the head librarian certified at the appropriate grade level? ✓	Yes No
Is the library open to the public an average of at least 20 hours per week? ✓	Yes No
Does the library spend at least \$2,500 on library materials? ✓	Yes No

STATEMENT CONCERNING SYSTEM EFFECTIVENESS

[NOTE: The system effectiveness statement can be submitted online as part of the Annual Report. The system effectiveness statement does not need to be sent separately to DPI.]

The statutory [...more](#)

Did the library system provide effective leadership and adequately meet the needs of the library? ✓	Yes
Comments or explanation of library board's response	

ATTACHMENTS

Report Attachments - Library	
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