

# Library Board Meeting Agenda



May 18, 2026 - 6:00 PM  
New Berlin Library  
15105 W Library Lane

## 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, April 20, 2026
  - B. **Next meeting date:** June 15, 2026
  - C. Approval of Bills and Invoices
6. **END CONSENT AGENDA**-----
7. **ADMINISTRATIVE REPORTS**
  - A. President's Report
  - B. Library Director's Infographic Report
8. **OLD BUSINESS**
  - A. Waukesha County Library Services Plan-Update
9. **NEW BUSINESS**
  - A. Waukesha County Library Standards Certification
  - B. Material Selection Policy Revisions
  - C. Trustee Essentials: Library Board Trustee Infographic and Roles and Responsibilities
10. **ANNOUNCEMENTS**
11. **ADJOURN**

Additional Information

- The agenda packet, including supplemental information related to agenda items, is available online at [www.NewBerlinWI.gov](http://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  
April 20, 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 6:02 P.M.

**3. ROLL CALL; OF QUORUM: PUBLIC NOTICE**

Present: Trustee Ruth Bock, Trustee Chuck Garrigues, Trustee Dolores Greenawalt, Treasurer Nathan Jung, Vice-President Jill Kawala, Trustee Charlotte Kroupa, President John Marek, Secretary Patti Orzel, and Trustee Barb Uhen

Staff Present: Library Director Natalie Beacom

Guests Present: None

President Marek confirmed that a quorum was present and that the meeting was properly posted in compliance with the Open Meetings Law.

**4. COMMITTEE REPORTS**

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

Director Beacom reported the Book Sale that was held on Friday, April 17 – Sunday, April 19<sup>th</sup> raised \$10,007, making it the most successful spring sale.

**5. CONSENT AGENDA**

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

A. Approval of minutes: Monday, February 19, 2026

B. Next meeting date: Monday, May 18, 2026, 6:00 P.M.

C. Approval of Bills and Invoices, February – March 2026

**6. END CONSENT AGENDA**

---

**MOTION: Motion** to approve the consent agenda.

**VOTE:** Motion by Kawala

Second by Kroupa

Motion approved 9-0

## 7. ADMINISTRATIVE REPORTS

### A. President's Report:

President Marek announced that Trustees Uhen and Bock will be retiring from the Board when their terms expire in June 2026.

### B Director's March and April Reports:

Director Beacom provided the Board with an update highlighting Attendance and Circulation; Finances; Buildings and Grounds; Meetings and Outreach; Patron Feedback, Programming, and Staffing from February and March. It was noted that the Library welcomed 17,823 visitors in February, an increase of 7% from 2025. Circulation totaled 26,523, also representing an increase of 7% from 2025. Libby downloads of online materials totaled, 6,392, a 17% increase from last February, and the MakerStudio welcomed 1,436 visitors, or a 48% increase in users from this time last year.

The Director's full report can be reviewed in the agenda packet which is available on the City of New Berlin's website.

## 8. UNFINISHED BUSINESS

### A. Waukesha County Library Services Plan 2027-2031

The Act 150 Committee reviewed the feedback from Bridges Libraries on the updated standards and decided to restore the FTEs to their previous levels. It was noted that even the boards who had voted in favor of the revised standards had expressed concerns about the proposed reduction in staffing levels.

**MOTION: Motion** to endorse the proposed Waukesha County Library Services Plan 2027 – 2031 as revised by the Act 150 Committee.

**VOTE:** Motion by Kroupa  
Second by Garrigues  
Motion approved 9-0

## 9. NEW BUSINESS

### A. Annual Adjacent County Request for Reimbursements

The request for reimbursement from Jefferson, Washington, and Dodge Counties for materials borrowed by residents of those counties was reviewed by the board.

B. Allowable Costs for Waukesha County Libraries

The statement of the Library's spending for 2025 actuals and 2026 budget was reviewed by the board and signed by the president.

C. Appointment of Nomination Committee for Library Board Officers for 2026-2027

Trustees Bock and Orzel volunteered to serve on the Nominating Committee.

D. Establish Ad Hoc Committee for the annual Director evaluation process

President Marek, Trustees Greenawalt and Jung volunteered to serve on the Ad Hoc Committee for the annual assessment of the Director's performance. Trustees Jung and Greenawalt also volunteered to review and revise the staff survey.

E. Library HVAC Construction- Heat Advisory Guidelines for Operations

The Library's HVAC replacement starts Monday, April 27th and finishes in early June. The book drop will be closed, and there will be no air conditioning. Staff are arranging alternative procedures. If excessive heat requires limited access to the building, inclement weather policies will apply.

F. Brainstorming Discussion: Library Advocacy

The board explored ideas to generate awareness of the benefits provided by the New Berlin Public Library to community members, especially among the under represented 30 – 49-year-old demographic.

**10. ANNOUNCEMENTS**

**11. ADJOURN**

**MOTION:** Motion to adjourn at 6:57 PM.

**VOTE:** Motion by Garrigues  
Second by Kroupa  
Motion approved 9-0.

**Respectfully submitted,**

**Patti Orzel, Secretary**

YEAR-TO-DATE BUDGET REPORT

FOR 2026 04									
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	190,327.97	.00	363,268.03	34.4%
15810000	50020	SALARY-PART TIME	494,766	0	494,766	160,548.93	.00	334,217.07	32.4%
15810000	51010	RETIREMENT	54,238	0	54,238	18,491.38	.00	35,746.62	34.1%
15810000	51020	FICA	78,688	0	78,688	26,549.56	.00	52,138.44	33.7%
15810000	51030	HEALTH INSURANCE	75,327	0	75,327	25,908.96	.00	49,418.04	34.4%
15810000	51060	LONG-TERM DISABI	81	0	81	.00	.00	81.00	.0%
15810000	51065	VISION/DENTAL IN	3,720	0	3,720	1,002.24	.00	2,717.76	26.9%
15810000	51070	LIFE INSURANCE	1,074	0	1,074	721.80	.00	352.20	67.2%
15810000	53010	ELECTRICITY	74,000	0	74,000	10,943.58	.00	63,056.42	14.8%
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	2,662.65	.00	3,337.35	44.4%
15810000	53050	HEATING FUEL	19,000	0	19,000	4,628.87	.00	14,371.13	24.4%
15810000	54010	R&M BLDGS & GROU	40,000	0	40,000	17,894.19	.00	22,105.81	44.7%
15810000	54030	MAINTENANCE CONT	50,000	0	50,000	3,598.18	.00	46,401.82	7.2%
15810000	54060	MARKETING	1,000	0	1,000	780.13	.00	219.87	78.0%
15810000	54080	LEASES EQUIPMENT	48,000	0	48,000	12,489.68	.00	35,510.32	26.0%
15810000	54110	SUPPLIES	27,000	0	27,000	2,853.58	.00	24,146.42	10.6%
15810000	54170	POSTAGE	700	0	700	200.00	.00	500.00	28.6%
15810000	54180	HOUSEKEEPING SUP	0	0	0	94.48	.00	-94.48	100.0%
15810000	54230	LIBRARY MATERIAL	219,480	0	219,480	65,719.38	.00	153,760.62	29.9%
15810000	54330	TRAINING EXPENSE	500	0	500	270.00	.00	230.00	54.0%
15810000	54521	TECHNOLOGY/SOFTW	39,000	0	39,000	.00	.00	39,000.00	.0%
15810000	55090	PROGRAMS-JUVENIL	1,200	0	1,200	344.22	.00	855.78	28.7%
15810000	55095	PROGRAMS-YOUNG A	1,800	0	1,800	70.92	.00	1,729.08	3.9%
15810000	55100	PROGRAMS-ADULT	1,200	0	1,200	697.14	.00	502.86	58.1%
TOTAL LIBRARY			1,793,370	0	1,793,370	546,797.84	.00	1,246,572.16	30.5%
TOTAL EXPENSES			1,793,370	0	1,793,370	546,797.84	.00	1,246,572.16	

YEAR-TO-DATE BUDGET REPORT

FOR 2026 04								
	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED	
GRAND TOTAL	1,793,370	0	1,793,370	546,797.84	.00	1,246,572.16	30.5%	
** END OF REPORT - Generated by Thu Van Hintz **								

<b>YEAR-TO-DATE THROUGH APRIL 30, 2026</b>						
<b>ORG</b>	<b>OBJ</b>	<b>ACCOUNT DESCRIPTION</b>	<b>REVISED BUDGET</b>	<b>YTD EXPENDED</b>	<b>AVAILABLE BUDGET</b>	<b>% USED</b>
15810000	50010	SALARY-FULL TIME	553,596	190,327.97	363,268	34.40
15810000	50020	SALARY-PART TIME	494,766	160,548.93	334,217	32.40
15810000	51010	RETIREMENT	54,238	18,491.38	35,747	34.10
15810000	51020	FICA	78,688	26,549.56	52,138	33.70
15810000	51030	HEALTH INSURANCE	75,327	25,908.96	49,418	34.40
15810000	51060	LONG-TERM DISABILITY	81	0.00	81	0.00
15810000	51065	VISION/DENTAL INSURANCE	3,720	1,002.24	2,718	26.90
15810000	51070	LIFE INSURANCE	1,074	721.80	352	67.20
15810000	53010	ELECTRICITY	74,000	10,943.58	63,056	14.80
15810000	53020	WATER/SEWER	3,000	0.00	3,000	0.00
15810000	53040	TELEPHONE/CELL PHONE	6,000	2,662.65	3,337	44.40
15810000	53050	HEATING FUEL	19,000	4,628.87	14,371	24.40
15810000	54010	R&M BLDGS & GROUNDS	40,000	17,894.19	22,106	44.70
15810000	54030	MAINTENANCE CONTRACT	50,000	3,598.18	46,402	7.20
15810000	54060	MARKETING	1,000	780.13	220	78.00
15810000	54080	LEASES EQUIPMENT	48,000	12,489.68	35,510	26.00
15810000	54110	SUPPLIES	27,000	2,853.58	24,146	10.60
15810000	54170	POSTAGE	700	200.00	500	28.60
15810000	54180	HOUSEKEEPING SUPPLY	0	94.48	-94	100.00
15810000	54230	LIBRARY MATERIALS	219,480	65,719.38	153,761	29.90
15810000	54330	TRAINING EXPENSES	500	270.00	230	54.00
15810000	54521	TECHNOLOGY/SOFTWARE	39,000	0.00	39,000	0.00
15810000	55090	PROGRAMS-JUVENILE	1,200	344.22	856	28.70
15810000	55095	PROGRAMS-YOUNG ADULT	1,800	70.92	1,729	3.90
15810000	55100	PROGRAMS-ADULT	1,200	697.14	503	58.10
		<b>Grand Total</b>	<b>1,793,370</b>	<b>546,797.84</b>	<b>1,246,572</b>	<b>30.50</b>

**YEAR-TO-DATE THROUGH APRIL 30, 2026**

<b>ORG</b>	<b>OBJ</b>	<b>ACCOUNT DESCRIPTION</b>	<b>REVISED BUDGET</b>	<b>YTD EXPENDED</b>	<b>AVAILABLE BUDGET</b>	<b>% USED</b>
15810000	50010	SALARY-FULL TIME	553,596	190,327.97	363,268	34.40
15810000	50020	SALARY-PART TIME	494,766	160,548.93	334,217	32.40
15810000	51010	RETIREMENT	54,238	18,491.38	35,747	34.10
15810000	51020	FICA	78,688	26,549.56	52,138	33.70
15810000	51030	HEALTH INSURANCE	75,327	25,908.96	49,418	34.40
15810000	51060	LONG-TERM DISABILITY	81	0.00	81	0.00
15810000	51065	VISION/DENTAL INSURANCE	3,720	1,002.24	2,718	26.90
15810000	51070	LIFE INSURANCE	1,074	721.80	352	67.20
15810000	53010	ELECTRICITY	74,000	10,943.58	63,056	14.80
15810000	53020	WATER/SEWER	3,000	0.00	3,000	0.00
15810000	53040	TELEPHONE/CELL PHONE	6,000	2,662.65	3,337	44.40
15810000	53050	HEATING FUEL	19,000	4,628.87	14,371	24.40
15810000	54010	R&M BLDGS & GROUNDS	40,000	17,894.19	22,106	44.70
15810000	54030	MAINTENANCE CONTRACT	50,000	3,598.18	46,402	7.20
15810000	54060	MARKETING	1,000	780.13	220	78.00
15810000	54080	LEASES EQUIPMENT	48,000	12,489.68	35,510	26.00
15810000	54110	SUPPLIES	27,000	2,853.58	24,146	10.60
15810000	54170	POSTAGE	700	200.00	500	28.60
15810000	54180	HOUSEKEEPING SUPPLY	0	94.48	-94	100.00
15810000	54230	LIBRARY MATERIALS	219,480	65,719.38	153,761	29.90
15810000	54330	TRAINING EXPENSES	500	270.00	230	54.00
15810000	54521	TECHNOLOGY/SOFTWARE	39,000	0.00	39,000	0.00
15810000	55090	PROGRAMS-JUVENILE	1,200	344.22	856	28.70
15810000	55095	PROGRAMS-YOUNG ADULT	1,800	70.92	1,729	3.90
15810000	55100	PROGRAMS-ADULT	1,200	697.14	503	58.10
		Grand Total	1,793,370	546,797.84	1,246,572	30.50

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/4 TO 2026/4										
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION		
22810000								LIBRARY DONATION		
22810000 54110 FOL								SUPPLIES		
013800 DEMCO INC	7790802	0	2026 4	INV	P	758.46 042926	282894	FOL#2608/3-TIER OVA		
015580 AMAZON CAPITAL SERVI	1W43-VKYP-1C9H	0	2026 4	INV	P	322.79 042926	282873	FOL#2603/PROG SUPPL		
						ACCOUNT TOTAL		1,081.25		
22810000 55100								PROGRAMS-ADULT		
249882 KACZMAROWSKI JOHN	4/11/26LIB PROG	0	2026 4	INV	P	30.00 042926	282933	PROG PRESENTER FEE-		
						ACCOUNT TOTAL		30.00		
						ORG 22810000 TOTAL		1,111.25		
FUND 0200 LIBRARY DONATION FUND						TOTAL:		1,111.25		

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

YEAR-TO-DATE BUDGET REPORT

FOR 2026 04

ACCOUNTS FOR:	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
581 LIBRARY							
22810000 48040 DONATIONS	0	0	0	-34,233.79	.00	34,233.79	100.0%
22810000 54110 SUPPLIES	0	0	0	104.59	.00	-104.59	100.0%
22810000 54110 FOL SUPPLIES	0	0	0	1,207.77	.00	-1,207.77	100.0%
22810000 55090 FOL PROGRAMS-JUVE	0	0	0	37.78	.00	-37.78	100.0%
22810000 55100 PROGRAMS-ADULT	0	0	0	430.00	.00	-430.00	100.0%
22810000 55100 FOL PROGRAMS-ADUL	0	0	0	2,525.00	.00	-2,525.00	100.0%
TOTAL LIBRARY	0	0	0	-29,928.65	.00	29,928.65	100.0%
TOTAL REVENUES	0	0	0	-34,233.79	.00	34,233.79	
TOTAL EXPENSES	0	0	0	4,305.14	.00	-4,305.14	

YEAR-TO-DATE BUDGET REPORT

FOR 2026 04

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
GRAND TOTAL	0	0	0	-29,928.65	.00	29,928.65	100.0%

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

YEAR-TO-DATE BUDGET REPORT

FOR 2026 04								
ACCOUNTS FOR:	ORIGINAL	TRANFRS/	REVISED	YTD ACTUAL	ENCUMBRANCES	AVAILABLE	PCT	
000 UNDESIGNATED	APPROP	ADJSTMTS	BUDGET			BUDGET	USE/COL	
01010400 44110 LIBRARY FINES	-45,000	0	-45,000	-6,982.79	.00	-38,017.21	15.5%	
01010400 44111 LIBRARY-COPIES	-8,500	0	-8,500	-2,262.33	.00	-6,237.67	26.6%	
01010400 44112 LIBRARY-OTHER SY	-28,415	0	-28,415	.00	.00	-28,415.00	.0%	
TOTAL UNDESIGNATED	-81,915	0	-81,915	-9,245.12	.00	-72,669.88	11.3%	
TOTAL REVENUES	-81,915	0	-81,915	-9,245.12	.00	-72,669.88		

YEAR-TO-DATE BUDGET REPORT

FOR 2026 04

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
GRAND TOTAL	-81,915	0	-81,915	-9,245.12	.00	-72,669.88	11.3%

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

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/4 TO 2026/4										
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION		
15810000										LIBRARY
15810000 53040										TELEPHONE/CELL PHONE
302074 AT&T	262785481704	0	2026 4	INV	P	145.65 042926		282876 PHONES-LIB 4/4/26		
302074 AT&T	6771045119	0	2026 4	INV	P	532.57 042926		282877 ROUTERS-LIB 4/7/26		
										678.22
										ACCOUNT TOTAL
										678.22
15810000 54030										MAINTENANCE CONTRACT
003228 BATZNER PEST CONTR	94758824	0	2026 4	INV	P	148.08 042926		282882 PESTCNTRL-LIB 4/6/2		
										ACCOUNT TOTAL
										148.08
15810000 54060										MARKETING
015580 AMAZON CAPITAL SERVI	1W43-VKYP-1C9H	0	2026 4	INV	P	83.31 042926		282873 FOL#2603/PROG SUPPL		
										ACCOUNT TOTAL
										83.31
15810000 54080										LEASES EQUIPMENT
362301 GREAT AMERICA FINANC	41775718	0	2026 4	INV	P	422.47 042926		282918 COPIER LEASE/USAGE-		
										ACCOUNT TOTAL
										422.47
15810000 54110										SUPPLIES
015580 AMAZON CAPITAL SERVI	1W43-VKYP-1C9H	0	2026 4	INV	P	32.18 042926		282873 FOL#2603/PROG SUPPL		
										ACCOUNT TOTAL
										32.18
15810000 54170										POSTAGE
348554 PURCHASE POWER	3256147 4/14/26	0	2026 4	INV	P	100.00 042926		282967 POSTAGE METER/POSTA		
										ACCOUNT TOTAL
										100.00
15810000 54230										LIBRARY MATERIALS
001613 GALE CENGAGE LEARNIN	999102550378	0	2026 4	INV	P	75.00 042926		282914 VARIOUS TITLES-LIB		
001613 GALE CENGAGE LEARNIN	999102614739	0	2026 4	INV	P	26.25 042926		282914 VARIOUS TITLES-LIB		
001613 GALE CENGAGE LEARNIN	999102619572	0	2026 4	INV	P	52.50 042926		282914 VARIOUS TITLES-LIB		
001613 GALE CENGAGE LEARNIN	999102619573	0	2026 4	INV	P	142.50 042926		282914 VARIOUS TITLES-LIB		
001613 GALE CENGAGE LEARNIN	999102621056	0	2026 4	INV	P	30.75 042926		282914 VARIOUS TITLES-LIB		
										327.00
005896 OLLIS BOOK CORPORATI	249663	0	2026 4	INV	P	62.94 042926		282952 VARIOUS TITLES-LIB		
005896 OLLIS BOOK CORPORATI	249664	0	2026 4	INV	P	424.87 042926		282952 VARIOUS TITLES-LIB		
005896 OLLIS BOOK CORPORATI	249665	0	2026 4	INV	P	1,771.04 042926		282952 VARIOUS TITLES-LIB		
										2,258.85
005972 WISCONSIN COUNTIES A	2026SUBSCRIP	0	2026 4	INV	P	20.00 042926		283004 2026 WI COUNTIES MA		
008180 FINDAWAY WORLD	530864	0	2026 4	INV	P	60.99 042926		282908 VARIOUS TITLES-LIB		

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/4 TO 2026/4											
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION			
011583 CAVENDISH SQUARE	CAL3558851	0	2026 4	INV	P	186.03 042926	282886	VARIOUS TITLES-LIB			
015580 AMAZON CAPITAL SERVI	14N4-YGD6-1KMT	0	2026 4	INV	P	3,478.28 042926	282873	VARIOUS TITLES-LIB			
015580 AMAZON CAPITAL SERVI	1LC4-MVG9-NNY1	0	2026 4	INV	P	12.99 042926	282873	VARIOUS TITLES-LIB			
015580 AMAZON CAPITAL SERVI	1TKP-HFVR-6C49	0	2026 4	INV	P	9.59 042926	282873	VARIOUS TITLES-LIB			
015580 AMAZON CAPITAL SERVI	1W43-VKYP-1C9H	0	2026 4	INV	P	1,166.08 042926	282873	FOL#2603/PROG SUPPL			
						4,666.94					
224537 EBSCO	2603954	0	2026 4	INV	P	34.10 042926	282899	VARIOUS TITLES-LIB			
260487 LERNER PUBLISHING GR	1566852	0	2026 4	INV	P	550.76 042926	282938	VARIOUS TITLES-LIB			
260487 LERNER PUBLISHING GR	1566971	0	2026 4	INV	P	95.96 042926	282938	VARIOUS TITLES-LIB			
						646.72					
350982 T-MOBILE	970673785 APR2026	0	2026 4	INV	P	613.22 042926	282987	INTERNET HOTSPOTS-L			
361291 MIDWEST TAPE	508680198	0	2026 4	INV	P	256.15 042926	282948	VARIOUS TITLES-LIB			
361291 MIDWEST TAPE	508715196	0	2026 4	INV	P	119.46 042926	282948	VARIOUS TITLES-LIB			
361291 MIDWEST TAPE	508715198	0	2026 4	INV	P	158.94 042926	282948	VARIOUS TITLES-LIB			
						534.55					
373842 PENWORTHY COMPANY	0616914-IN	0	2026 4	INV	P	4,713.05 042926	282958	VARIOUS TITLES-LIB			
373842 PENWORTHY COMPANY	0616932-IN	0	2026 4	INV	P	3,625.39 042926	282958	VARIOUS TITLES-LIB			
373842 PENWORTHY COMPANY	0617029-IN	0	2026 4	INV	P	614.19 042926	282958	VARIOUS TITLES-LIB			
						8,952.63					
			ACCOUNT TOTAL			18,301.03					
			ORG 15810000 TOTAL			19,765.29					
FUND 0010 GENERAL FUND						TOTAL:		19,765.29			

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



INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/5 TO 2026/5									
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP S	PAYABLES	CHECK	DESCRIPTION		
22810000							LIBRARY DONATION		
22810000 55090 FOL							PROGRAMS-JUVENILE		
011840 US BANK	3/16/26SPOTIFY-LIB	0	2026 5	INV P	19.94	050826E	10158 FOL#2537/SPOTIFY/MU		
					19.94		ACCOUNT TOTAL		
					19.94		ORG 22810000 TOTAL		
FUND 0200 LIBRARY DONATION FUND					TOTAL:		19.94		

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

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/5 TO 2026/5		ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION
15810000			LIBRARY							
15810000	54010				R&M BLDGS & GROUNDS					
001675	ELLIOTT ACE HARDWAR	358231		0	2026	5	INV P	10.79	051326	283065 MAINT-LIB 4/21/26
001675	ELLIOTT ACE HARDWAR	358265		0	2026	5	INV P	10.42	051326	283065 MAINT-LIB 4/22/26
001675	ELLIOTT ACE HARDWAR	358288		0	2026	5	INV P	4.30	051326	283065 MAINT-LIB 4/23/26
								<b>25.51</b>		
005424	NATIONAL ELEVATOR	26007863 RI 00396		0	2026	5	INV P	125.00	051326	283117 ELEVATOR INSPECTION
009602	FERGUSON	1677037		0	2026	5	INV P	59.09	051326	283066 MAINT/RPAIRS-LIB 4/
021061	STEEL FARMER LLC	3256		0	2026	5	INV P	850.00	051326	283157 LIBRARY STAIRWAY RP
021071	OVERLAND ROOFING	3108		0	2026	5	INV P	12,985.00	051326	283125 GUTTERS-LIB 5/1/26
026400	ITU ABSORB TECH	8715007		0	2026	5	INV P	94.48	051326	283087 MATS-LIB 4/20/26
311839	HOME DEPOT CREDIT SE	9622261		0	2026	5	INV P	62.74	051326	283082 MAINT-LIB 4/17/26
					ACCOUNT TOTAL			14,201.82		
15810000	54030				MAINTENANCE CONTRACT					
014113	K-12 TECHNOLOGY GROU	96921		0	2026	5	INV P	14,082.00	051326	283094 SEMI ANNUAL BILL DE
					ACCOUNT TOTAL			14,082.00		
15810000	54060				MARKETING					
015580	AMAZON CAPITAL SERVI	1KQN-PFH4-1MQR		0	2026	5	INV P	382.01	051326	283031 FOL#2609 &#2605/PRO
					ACCOUNT TOTAL			382.01		
15810000	54080				LEASES EQUIPMENT					
295906	PITNEY BOWES	3322473451		0	2026	5	INV P	77.28	051326	283130 POSTAGE METER LEASE
362301	GREAT AMERICA FINANC	41915697		0	2026	5	INV P	590.74	051326	283075 COPIER LEASE/USAGE-
					ACCOUNT TOTAL			668.02		
15810000	54110				SUPPLIES					
015580	AMAZON CAPITAL SERVI	1JK3-G4DT-HHRJ		0	2026	5	CRM P	-34.98	051326	283031 RET PURCH CRDIT-LIB
015580	AMAZON CAPITAL SERVI	1KQN-PFH4-1MQR		0	2026	5	INV P	1,367.77	051326	283031 FOL#2609 &#2605/PRO
015580	AMAZON CAPITAL SERVI	1MFL-NF3G-1PJL		0	2026	5	INV P	119.97	051326	283031 FOL#2607/SUPPLIES/V
								<b>1,452.76</b>		
016155	ONE CAKE AT A TIME L	1813		0	2026	5	INV P	125.00	051326	283122 EVENT CAKE-LIB 4/26
020058	ODP BUSINESS	459704954001		0	2026	5	INV P	354.00	051326	283120 OFFICE SUPPLIES-LIB
					ACCOUNT TOTAL			1,931.76		

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/5 TO 2026/5											
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION			
15810000 54230											
001613 GALE CENGAGE LEARNIN	999102643589	0	2026 5	INV	P	57.75 051326		283069	LIBRARY MATERIALS VARIOUS TITLES-LIB		
001613 GALE CENGAGE LEARNIN	999102654061	0	2026 5	INV	P	99.00 051326		283069	VARIOUS TITLES-LIB		
						<b>156.75</b>					
013800 DEMCO INC	7798799	0	2026 5	INV	P	92.92 051326		283059	LAMINATE-LIB 4/27/2		
015580 AMAZON CAPITAL SERVI	11P9-367D-CDQF	0	2026 5	CRM	P	-5.98 051326		283031	RET PURCH CRDT-LIB		
015580 AMAZON CAPITAL SERVI	1CNX-WDCT-WXQ1	0	2026 5	CRM	P	-12.99 051326		283031	RET PURCH CRDIT-LIB		
015580 AMAZON CAPITAL SERVI	1KQN-PFH4-1MQR	0	2026 5	INV	P	1,587.75 051326		283031	FOL#2609 &#2605/PRO		
015580 AMAZON CAPITAL SERVI	1KYP-RQ4G-36W4	0	2026 5	CRM	P	-16.50 051326		283031	RET PURCH CRDIT-LIB		
015580 AMAZON CAPITAL SERVI	1MFL-NF3G-1PJL	0	2026 5	INV	P	2,044.42 051326		283031	FOL#2607/SUPPLIES/V		
015580 AMAZON CAPITAL SERVI	1P6G-WCFM-GYD6	0	2026 5	CRM	P	-15.95 051326		283031	RET PURCH CRDIT-LIB		
015580 AMAZON CAPITAL SERVI	1PFG-NH6J-CYVQ	0	2026 5	CRM	P	-5.98 051326		283031	RET PURCH CRDT-LIB		
015580 AMAZON CAPITAL SERVI	1QYG-WKWF-WYLP	0	2026 5	INV	P	32.84 051326		283031	COFFEE/TEA/HOT CHOC		
015580 AMAZON CAPITAL SERVI	1R9X-4RTX-6TYJ	0	2026 5	CRM	P	-.11 051326		283031	RET PURCH CRDIT-LIB		
015580 AMAZON CAPITAL SERVI	1RVY-QHH9-YN31	0	2026 5	INV	P	12.19 051326		283031	VARIOUS TITLES-LIB		
015580 AMAZON CAPITAL SERVI	1V99-FJ3L-DQGR	0	2026 5	INV	P	12.99 051326		283031	VARIOUS TITLES-LIB		
015580 AMAZON CAPITAL SERVI	1XLF-KQ1C-XLDN	0	2026 5	CRM	P	-55.99 051326		283031	RET PURCH CRDIT-LIB		
						<b>3,576.69</b>					
085010 WAUKESHA COUNTY TREA	CINV2026-01548	0	2026 5	INV	P	20,236.00 051326		283170	2026 MEMBER DATABAS		
085010 WAUKESHA COUNTY TREA	CINV2026-01574	0	2026 5	INV	P	1,698.48 051326		283170	2026 COOP-LIB 4/13/		
						<b>21,934.48</b>					
224529 BLACKSTONE PUBLISHIN	2232278	0	2026 5	INV	P	158.60 051326		283041	VARIOUS TITLES-LIB		
260487 LERNER PUBLISHING GR	1567107	0	2026 5	INV	P	23.99 051326		283099	VARIOUS TITLES -LIB		
294772 CHILDS WORLD	NA166001	0	2026 5	INV	P	143.70 051326		283053	VARIOUS TITLES-LIB		
353213 CHILDREN'S PLUS INC	278369	0	2026 5	INV	P	170.79 051326		283052	VARIOUS TITLES-LIB		
361291 MIDWEST TAPE	508737718	0	2026 5	INV	P	207.93 051326		283112	VARIOUS TITLES-LIB		
361291 MIDWEST TAPE	508768872	0	2026 5	INV	P	231.17 051326		283112	VARIOUS TITLES-LIB		
						<b>439.10</b>					
373842 PENWORTHY COMPANY	0616999-IN	0	2026 5	INV	P	152.85 051326		283127	VARIOUS TITLES-LIB		
373842 PENWORTHY COMPANY	0617015-IN	0	2026 5	INV	P	647.65 051326		283127	VARIOUS TITLES-LIB		
373842 PENWORTHY COMPANY	0617135-IN	0	2026 5	INV	P	1,297.40 051326		283127	VARIOUS TITLES-LIB		
						<b>2,097.90</b>					
						ACCOUNT TOTAL	28,794.92				
15810000 54521											
085010 WAUKESHA COUNTY TREA	CINV2026-01548	0	2026 5	INV	P	36,300.00 051326		283170	2026 MEMBER DATABAS		
085010 WAUKESHA COUNTY TREA	CINV2026-01549	0	2026 5	INV	P	883.00 051326		283170	2026 MEMBER/MOVIE L		

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/5 TO 2026/5												
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION				
											37,183.00	
											ACCOUNT TOTAL	37,183.00
15810000	55100										PROGRAMS-ADULT	
349119	WONGTAM STEPHANIE	2026 JUN23	PROG	0							2026 5 INV P	500.00
						051326	283175	2026	JUN23RD	MAHJON		
											ACCOUNT TOTAL	500.00
											ORG 15810000 TOTAL	97,743.53
FUND 0010 GENERAL FUND						TOTAL:						97,743.53

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

YEAR-TO-DATE BUDGET REPORT

FOR 2026 05									
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	211,522.48	.00	342,073.52	38.2%
15810000	50020	SALARY-PART TIME	494,766	0	494,766	178,387.83	.00	316,378.17	36.1%
15810000	51010	RETIREMENT	54,238	0	54,238	20,556.00	.00	33,682.00	37.9%
15810000	51020	FICA	78,688	0	78,688	29,499.55	.00	49,188.45	37.5%
15810000	51030	HEALTH INSURANCE	75,327	0	75,327	28,997.58	.00	46,329.42	38.5%
15810000	51060	LONG-TERM DISABI	81	0	81	.00	.00	81.00	.0%
15810000	51065	VISION/DENTAL IN	3,720	0	3,720	1,127.52	.00	2,592.48	30.3%
15810000	51070	LIFE INSURANCE	1,074	0	1,074	812.27	.00	261.73	75.6%
15810000	53010	ELECTRICITY	74,000	0	74,000	10,943.58	.00	63,056.42	14.8%
15810000	53020	WATER/SEWER	3,000	0	3,000	1,033.14	.00	1,966.86	34.4%
15810000	53040	TELEPHONE/CELL P	6,000	0	6,000	2,662.65	.00	3,337.35	44.4%
15810000	53050	HEATING FUEL	19,000	0	19,000	4,628.87	.00	14,371.13	24.4%
15810000	54010	R&M BLDGS & GROU	40,000	0	40,000	32,096.01	.00	7,903.99	80.2%
15810000	54030	MAINTENANCE CONT	50,000	-775	49,225	17,680.18	.00	31,544.82	35.9%
15810000	54060	MARKETING	1,000	0	1,000	1,162.14	.00	-162.14	116.2%
15810000	54080	LEASES EQUIPMENT	48,000	0	48,000	13,157.70	.00	34,842.30	27.4%
15810000	54110	SUPPLIES	27,000	0	27,000	4,785.34	.00	22,214.66	17.7%
15810000	54170	POSTAGE	700	0	700	200.00	.00	500.00	28.6%
15810000	54180	HOUSEKEEPING SUP	0	0	0	94.48	.00	-94.48	100.0%
15810000	54230	LIBRARY MATERIAL	219,480	775	220,255	94,514.30	.00	125,740.70	42.9%
15810000	54330	TRAINING EXPENSE	500	0	500	270.00	.00	230.00	54.0%
15810000	54521	TECHNOLOGY/SOFTW	39,000	0	39,000	37,183.00	.00	1,817.00	95.3%
15810000	55090	PROGRAMS-JUVENIL	1,200	0	1,200	344.22	.00	855.78	28.7%
15810000	55095	PROGRAMS-YOUNG A	1,800	0	1,800	70.92	.00	1,729.08	3.9%
15810000	55100	PROGRAMS-ADULT	1,200	0	1,200	1,197.14	.00	2.86	99.8%
TOTAL LIBRARY			1,793,370	0	1,793,370	692,926.90	.00	1,100,443.10	38.6%
TOTAL EXPENSES			1,793,370	0	1,793,370	692,926.90	.00	1,100,443.10	

**YEAR-TO-DATE BUDGET REPORT**

FOR 2026 05

	ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
GRAND TOTAL	1,793,370	0	1,793,370	692,926.90	.00	1,100,443.10	38.6%

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

YEAR-TO-DATE BUDGET REPORT

FOR 2026 05

ACCOUNTS FOR:	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
581 LIBRARY							
22810000 48040 DONATIONS	0	0	0	-38,520.89	.00	38,520.89	100.0%
22810000 54110 SUPPLIES	0	0	0	1,882.86	.00	-1,882.86	100.0%*
22810000 54110 FOL SUPPLIES	0	0	0	3,085.29	.00	-3,085.29	100.0%*
22810000 55090 FOL PROGRAMS-JUVE	0	0	0	37.78	.00	-37.78	100.0%*
22810000 55095 FOL PROGRAMS-YOUN	0	0	0	2,000.00	.00	-2,000.00	100.0%*
22810000 55100 PROGRAMS-ADULT	0	0	0	430.00	.00	-430.00	100.0%*
22810000 55100 FOL PROGRAMS-ADUL	0	0	0	3,150.00	.00	-3,150.00	100.0%*
TOTAL LIBRARY	0	0	0	-27,934.96	.00	27,934.96	100.0%
TOTAL REVENUES	0	0	0	-38,520.89	.00	38,520.89	
TOTAL EXPENSES	0	0	0	10,585.93	.00	-10,585.93	

YEAR-TO-DATE BUDGET REPORT

FOR 2026 05

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
GRAND TOTAL	0	0	0	-27,934.96	.00	27,934.96	100.0%

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

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2026/5 TO 2026/5											
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION			
22810000								LIBRARY DONATION			
22810000	54110							SUPPLIES			
015580	AMAZON CAPITAL SERVI	1KQN-PFH4-1MQR	0	2026	5	INV	P	1,528.53	051326	283031	FOL#2609 &#2605/PRO
015580	AMAZON CAPITAL SERVI	1MFL-NF3G-1PJL	0	2026	5	INV	P	249.74	051326	283031	FOL#2607/SUPPLIES/V
								1,778.27			
								ACCOUNT TOTAL			1,778.27
22810000	54110	FOL						SUPPLIES			
015580	AMAZON CAPITAL SERVI	1MFL-NF3G-1PJL	0	2026	5	INV	P	911.52	051326	283031	FOL#2607/SUPPLIES/V
085010	WAUKESHA COUNTY TREA	CINV2026-01518	0	2026	5	INV	P	966.00	051326	283170	FOL#2602/2026 BOOKP
								ACCOUNT TOTAL			1,877.52
22810000	55095	FOL						PROGRAMS-YOUNG ADULT			
004622	TELLER MICHAEL & SAR	2026 STUDENT SCHOLAR	0	2026	5	INV	P	500.00	051326	283158	FOL#2538/2026 STUDE
009943	BINDL, STEPHEN W & S	2026 STUDENT SCHOLAR	0	2026	5	INV	P	500.00	051326	283040	FOL#2538/2026 STUDE
199176	DOERING NATALIE	2026 STUDENT SCHOLAR	0	2026	5	INV	P	500.00	051326	283061	FOL#2538/2026 STUDE
341223	MC RAE JULIA S	2026 STUDENT SCHOLAR	0	2026	5	INV	P	500.00	051326	283108	FOL#2538/2026 STUDE
								ACCOUNT TOTAL			2,000.00
22810000	55100	FOL						PROGRAMS-ADULT			
258385	VAN DUNK GREG	2026 JUN10 PROG	0	2026	5	INV	P	625.00	051326	283165	FOL#2606/2026 JUN 1
								ACCOUNT TOTAL			625.00
								ORG 22810000 TOTAL			6,280.79
FUND 0200 LIBRARY DONATION FUND						TOTAL:		6,280.79			

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

"The programs are so amazing and so are the staff! I love the displays and the HUGE collection too. I find the book bags very useful." - Tammy J.



May's Reading Buddy...an itty bitty tater!

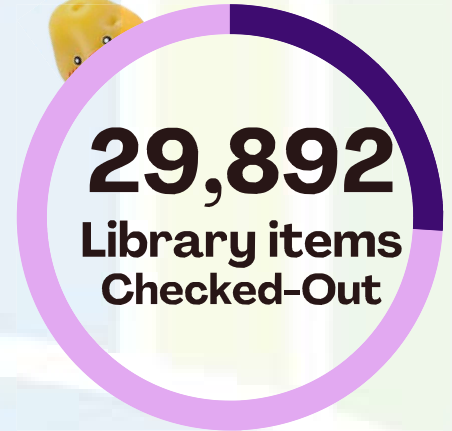
## Library Visits: 20,082

11.5% increase from last month with 4 days closed due to holiday and weather.



Meet, **Ethan Roberts**, New Berlin Eisenhower Middle Schooler and the **2026 Badger State Spelling Bee Champion!** Ethan recently visited the Library to talk about his interest in spelling, and the importance of words and language. Ethan competes at the Scripp's National Spelling Bee in Washington D.C., May 26-28! For the full conversation, visit:

<https://www.newberlinlibrary.org/blog>



## Library Highlights

- Donations for the United State's 250<sup>th</sup> Birthday Cake Kits have begun! Drop cakes mixes, pans, frosting and candles off at the Library for the NB Food Pantry.
- Experienced a Bridges Library System-wide internet outage for 2.5 days, and used hot-spots to maintain basic services!
- The Library's newest collection, "public art", is in the purchasing phase with cataloging to begin soon. Looking forward to exhibiting art for patrons to check out.
- Launched the 2026 Seed Library with a variety of flower and vegetable seeds.
- The MakerKids Club created DIY edible birdhouses!
- Oslo, Mac, Petunia and Molly, enjoyed listening to stories read by young readers during "Puppy Pages"

**MakerStudio Visits**  
**1,432**  
15% increase from March

## Building Updates

- The outdoor construction and HVAC project are **on schedule**. There is a electric issue that was discovered during the excavation, but the DPW is working with electrical contractors to resolve the issue.
- We purchased the equipment and software for Envisionware EasyPay Mobile Printing and are excited to enhance our printing capabilities for visitors using their personal devices.

## Staffing Updates

- The Library is pleased to announce that our new Public Services Manager will be Office Coordinator, Julita Kosiak-Chaltry. She will begin her new position in June, and we are excited to see her continue serving our community in this new role.
- Annual evaluations are underway, it's nice to sit down and talk with all the staff about their annual highlights and goals for the next year!
- Leadership staff attended the CVMIC Library Roundtable to connect with libraries across the State to discuss current library trends.
- Librarians attended, "Responding with Care: Everyday De-Escalation Skills, a training provided by NAMI.

## Spring School Visits!

May is a favorite time of year for the NBPL Youth Librarians because they visit local schools and host school visits and tours to the Library!



**Home Delivery**  
46 Patrons & 223 Items!

Submitted by:  
Natalie Beacom  
Library Director

## Sneak Peak:

Summer Reading is just around the corner... the Youth Librarians have unearthed some dinotastic adventures for everyone!



TO: Waukesha County Board of Supervisors

FROM: Waukesha County Act 150 Library Services Planning Committee

DATE: 4/6/2026

SUBJECT: Considerations for Future Waukesha County Library Services Plans

The Waukesha County Act 150 Library Services Planning Committee met from August 2025-April 2026. Over nine months the committee evaluated past practices, the current landscape of library services, and performed future-casting on how best to provide a plan that would support quality library services across the county for the next five years.

Throughout these thoughtful discussions, there were a number of emerging topics that were not able to be integrated into the proposed 2027-2031 Waukesha County Library Services Plan. It is the intent of this memo to provide some documentation about these developing conversations, to allow for a future roadmap when considering the next library services planning committee.

1. How can a library services plan do its best to anticipate the future? In what ways must it demonstrate innovation and future cast? How can it be specific but also flexible enough to anticipate changes over the life of the plan?
2. A five year plan allows for the hard work of the planning process to unfold, and is a sustainable turnaround time given the work that needs to be put into it by staff and committee members. But in five years a lot can change. Is the length of the plan effective for its purpose?
3. The Library Services Effort Ratio was designed to track whether most of a library's business is done at home. Is it still relevant in today's library services world?
4. With libraries constantly evolving their business models, how does a future plan represent spaces like bookmobiles, or staffed or unstaffed branches? How can it anticipate the ever changing nature of electronic resources?
5. A new distribution formula was introduced after much analysis. After implementation it should be studied to assess outcomes. Is it performing as anticipated? Are there adjustments to make?



---

# Waukesha County Library Services Plan 2027-2031

---



Pending Approval by the  
Waukesha County Board of Supervisors

[INSERT DATE]

---

# Table of Contents

Waukesha County Library Planning Committee .....	3
Introduction.....	4
Role of the Wisconsin Public Library .....	5
Vision.....	5
Mission Statement and Core Values .....	5
Statutory Requirements .....	6
Planning Process.....	6
County Profile.....	7
County Library Services Profile .....	8
Regional Public Library Systems.....	10
Public Library Data Comparative Analysis .....	11
Key Strategic Issues .....	13
Strategic Issue #1. County Funding Collection Formula .....	13
Goals and Objectives for Strategic Issue #1 - County Funding Collection Formula.....	16
Strategic Issue #2. County Funding Distribution Formula.....	17
Goals and Objectives for Strategic Issue #2 – County Funding Distribution Formula.....	19
Strategic Issue #3. Standards .....	19
Goals and Objectives for Strategic Issue #3 – Standards .....	33
Strategic Issue #4. Library Establishment .....	33
Goals and Objectives for Strategic Issue #4 – Library Establishment .....	34
Strategic Issue #5. Relationships with Others.....	34
Goals and Objectives for Strategic Issue #5 – Relationships with Others .....	35
Strategic Issue #6. CAFÉ Shared Automation System .....	35
Goals and Objectives for Strategic Issue #6 – CAFÉ Shared Automation System .....	36
Strategic Issue #7. Regional Library System Membership and Services .....	36
Goals and Objectives for Strategic Issue #7 – Regional Library Systems.....	37
Plan Implementation .....	37
Review of the Plan .....	37
Appendices .....	38

# 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 April 2026. Nine 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 3<sup>rd</sup>, 2026 and later April 6<sup>th</sup>, 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 May 26<sup>th</sup>, 2026.

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, Collection Size, and Public Computer Minimums to acknowledge the need for more flexibility with tight local budgets.
- ❖ A recommendation to retain the FTE, Hours Open and Wi-Fi Minimums as-is.
- ❖ A recommendation to retain the Quality Assurance Standards as-is, to help assure accountability.

## County Profile

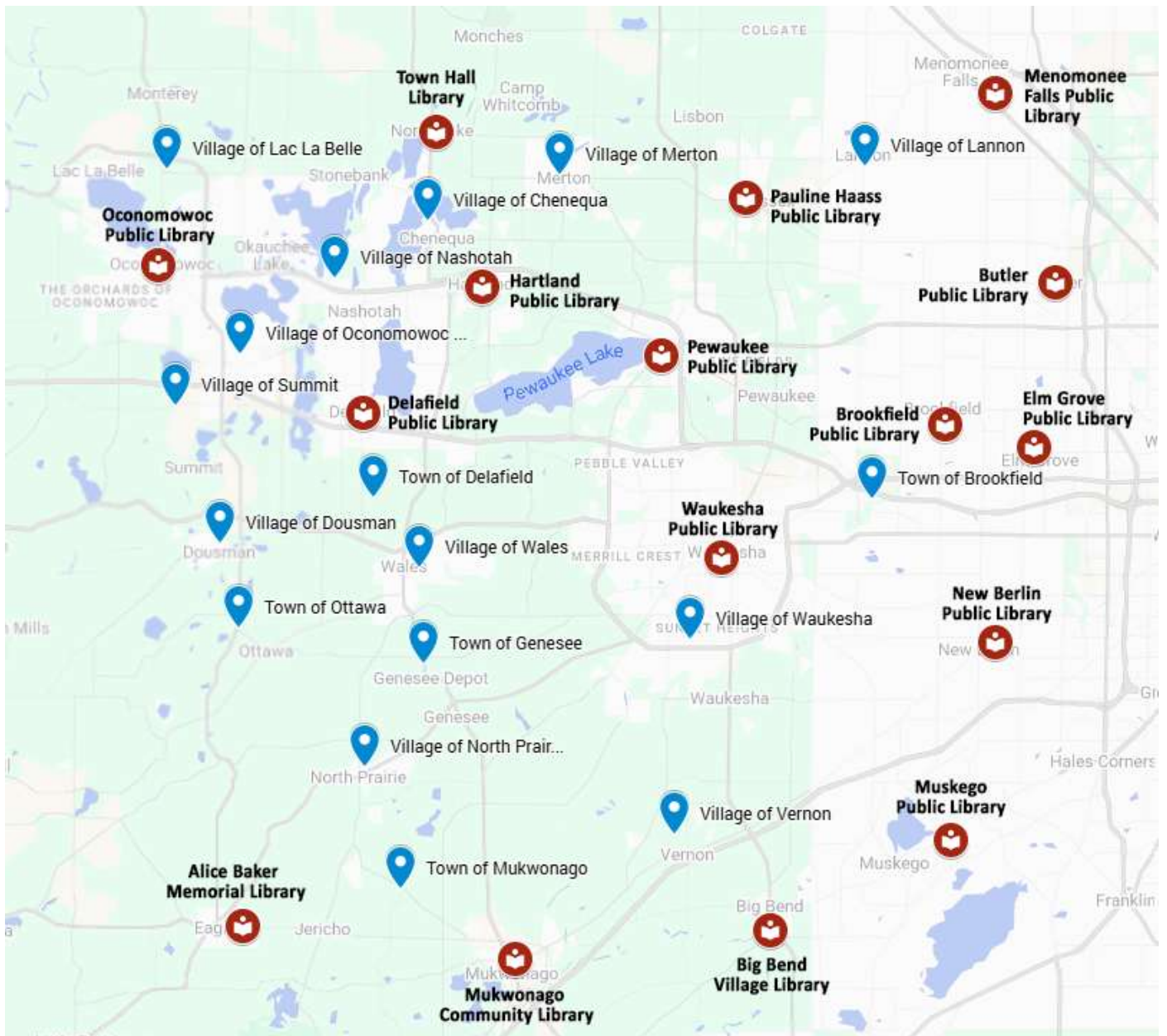
Understanding the trends in the population of Waukesha County provides the background for planning. The 2020 Census and 2023 American Community Survey from the U.S. Census estimates, as well as the State of Wisconsin Department of Administration (DOA) website showed following in Waukesha County:



- 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 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
<b>Total Allowable Costs</b>	<b>\$ 22,520,549</b>

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.**

<b>Library Municipality</b>	<b>Population of Municipality</b>
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. While the Committee analyzed potential options to reduce the FTE requirement, feedback throughout the endorsement process indicated this would be a negative impact for quality library services and the FTE Minimum was kept at the same level as the 2022-2026 plan.

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

Population	FTE Staffing Minimum Budget
17,500	11.62
18,000	11.74
18,500	11.86
19,000	11.98
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
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

---

## 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 1<sup>st</sup>, 2027. 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. Until and unless new standards are adopted in accordance with state statute requirements, the most recently adopted standards will remain in place.

## 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) Library Circulation and Net Crossover Circulation.

(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's total annual True Non-Resident Library Circulation and Net Crossover Circulation (in person or by inter-library loan).
7. *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 Net COC/TNR.
8. *Allowable Costs* shall mean the sum of all Waukesha County library current year budgets, adjusted for prior year actual expenditures and revenues that shall be determined by calculating the sum of the difference of actual year-end figures for allowable expenditures and revenues and either reducing or increasing the current year budget adopted by the Waukesha County library boards accordingly. When the prior-year revenues exceed expenditures, the current year budget is reduced by that amount.

When the prior-year expenditures exceed revenues, the current-year budget is increased by that amount.

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).

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% 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 first 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.

(d) 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.

(e) 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<sup>1, 2</sup>

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

<sup>2</sup>2025 DOA pop. most current available for 2027 budget planning, will be the pop. used for 2027 standards

<sup>3</sup> See footnote three at the bottom this chart on page 48

Population	Materials Expenditures <sup>3</sup>	Materials Exp. / Capita <sup>3</sup> Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
1,000	\$6,000	\$6.00	35	2.00	11,900	2	Yes
1,500	\$9,000	\$6.00	35	2.00	11,900	2	Yes
2,000	\$12,000	\$6.00	35	2.00	11,900	2	Yes
2,500	\$15,000	\$6.00	36	2.00	11,900	2	Yes
3,000	\$18,000	\$6.00	38	3.00	15,600	2	Yes
3,500	\$21,000	\$6.00	39	3.00	19,300	2	Yes
4,000	\$24,000	\$6.00	40	4.00	22,900	2	Yes
4,500	\$27,000	\$6.00	41	4.00	26,600	2	Yes
5,000	\$30,000	\$6.00	43	5.00	30,200	2	Yes
5,500	\$33,000	\$6.00	44	5.00	33,900	2	Yes
6,000	\$36,000	\$6.00	45	6.00	37,600	2	Yes
6,500	\$39,000	\$6.00	46	6.00	41,200	2	Yes
7,000	\$42,000	\$6.00	48	7.00	44,900	2	Yes
7,500	\$45,000	\$6.00	49	7.00	48,500	2	Yes
8,000	\$48,000	\$6.00	50	8.00	52,200	2	Yes
8,500	\$51,000	\$6.00	51	8.00	55,900	2	Yes
9,000	\$54,000	\$6.00	53	9.00	59,500	2	Yes
9,500	\$57,000	\$6.00	54	9.00	63,200	2	Yes
10,000	\$60,000	\$5.00	55	10.00	66,800	3	Yes
10,500	\$62,500	\$5.00	55	10.10	67,800	3	Yes
11,000	\$65,000	\$5.00	55	10.20	68,700	3	Yes
11,500	\$67,500	\$5.00	55	10.31	69,600	3	Yes
12,000	\$70,000	\$5.00	55	10.41	70,500	3	Yes
12,500	\$72,500	\$5.00	55	10.51	71,400	3	Yes
13,000	\$75,000	\$5.00	55	10.62	72,300	3	Yes
13,500	\$77,500	\$5.00	55	10.73	73,200	3	Yes
14,000	\$80,000	\$5.00	55	10.84	74,200	4	Yes
14,500	\$82,500	\$5.00	55	10.94	75,100	4	Yes
15,000	\$85,000	\$5.00	56	11.05	76,000	4	Yes
15,500	\$87,500	\$5.00	56	11.17	76,900	4	Yes
16,000	\$90,000	\$5.00	56	11.28	77,800	4	Yes
16,500	\$92,500	\$5.00	56	11.39	78,700	4	Yes
17,000	\$95,000	\$5.00	56	11.51	79,700	4	Yes
17,500	\$97,500	\$5.00	56	11.62	80,600	4	Yes
18,000	\$100,000	\$5.00	56	11.74	81,500	5	Yes

Population	Materials Expenditures <sup>3</sup>	Materials Exp. / Capita <sup>3</sup> Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
18,500	\$102,500	\$5.00	56	11.86	82,400	5	Yes
19,000	\$105,000	\$5.00	56	11.98	83,300	5	Yes
19,500	\$107,500	\$5.00	56	12.10	84,200	5	Yes
20,000	\$110,000	\$5.00	57	12.22	85,100	5	Yes
20,500	\$112,500	\$5.00	57	12.34	86,100	5	Yes
21,000	\$115,000	\$5.00	57	12.47	87,000	5	Yes
21,500	\$117,500	\$5.00	57	12.59	87,900	5	Yes
22,000	\$120,000	\$5.00	57	12.72	88,800	6	Yes
22,500	\$122,500	\$5.00	57	12.85	89,700	6	Yes
23,000	\$125,000	\$5.00	57	12.98	90,600	6	Yes
23,500	\$127,500	\$5.00	57	13.11	91,500	6	Yes
24,000	\$130,000	\$5.00	57	13.24	92,500	6	Yes
24,500	\$132,500	\$5.00	57	13.38	93,400	6	Yes
25,000	\$135,000	\$5.00	58	13.51	94,300	6	Yes
25,500	\$137,500	\$5.00	58	13.64	95,000	6	Yes
26,000	\$140,000	\$5.00	58	13.77	95,800	7	Yes
26,500	\$142,500	\$5.00	58	13.90	96,500	7	Yes
27,000	\$145,000	\$5.00	58	14.03	97,200	7	Yes
27,500	\$147,500	\$5.00	58	14.16	98,000	7	Yes
28,000	\$150,000	\$5.00	58	14.30	98,700	7	Yes
28,500	\$152,500	\$5.00	58	14.44	99,400	7	Yes
29,000	\$155,000	\$5.00	58	14.57	100,200	7	Yes
29,500	\$157,500	\$5.00	58	14.71	100,900	7	Yes
30,000	\$160,000	\$5.00	59	14.85	101,600	8	Yes
30,500	\$162,500	\$5.00	59	14.99	102,300	8	Yes
31,000	\$165,000	\$5.00	59	15.13	103,100	8	Yes
31,500	\$167,500	\$5.00	59	15.28	103,800	8	Yes
32,000	\$170,000	\$5.00	59	15.42	104,500	8	Yes
32,500	\$172,500	\$5.00	59	15.57	105,300	8	Yes
33,000	\$175,000	\$5.00	59	15.72	106,000	8	Yes
33,500	\$177,500	\$5.00	59	15.87	106,700	8	Yes
34,000	\$180,000	\$5.00	59	16.02	107,500	9	Yes
34,500	\$182,500	\$5.00	59	16.17	108,200	9	Yes
35,000	\$185,000	\$5.00	60	16.32	108,900	9	Yes
35,500	\$187,500	\$5.00	60	16.48	109,700	9	Yes
36,000	\$190,000	\$5.00	60	16.63	110,400	9	Yes
36,500	\$192,500	\$5.00	60	16.79	111,100	9	Yes
37,000	\$195,000	\$5.00	60	16.95	111,900	9	Yes
37,500	\$197,500	\$5.00	60	17.11	112,600	9	Yes
38,000	\$200,000	\$5.00	60	17.28	113,300	10	Yes

Population	Materials Expenditures <sup>3</sup>	Materials Exp. / Capita <sup>3</sup> Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
38,500	\$202,500	\$5.00	60	17.44	114,100	10	Yes
39,000	\$205,000	\$5.00	60	17.61	114,800	10	Yes
39,500	\$207,500	\$5.00	60	17.77	115,500	10	Yes
40,000	\$210,000	\$5.00	60	17.94	116,300	10	Yes
40,500	\$212,500	\$5.00	60	18.11	117,000	10	Yes
41,000	\$215,000	\$5.00	60	18.28	117,700	10	Yes
41,500	\$217,500	\$5.00	60	18.46	118,500	10	Yes
42,000	\$220,000	\$5.00	60	18.63	119,200	11	Yes
42,500	\$222,500	\$5.00	60	18.81	119,900	11	Yes
43,000	\$225,000	\$5.00	60	18.99	120,600	11	Yes
43,500	\$227,500	\$5.00	60	19.17	121,400	11	Yes
44,000	\$230,000	\$5.00	60	19.35	122,100	11	Yes
44,500	\$232,500	\$5.00	60	19.54	122,800	11	Yes
45,000	\$235,000	\$5.00	60	19.72	123,600	11	Yes
45,500	\$237,500	\$5.00	60	19.91	124,300	11	Yes
46,000	\$240,000	\$5.00	60	20.10	125,000	12	Yes
46,500	\$242,500	\$5.00	60	20.29	125,800	12	Yes
47,000	\$245,000	\$5.00	60	20.48	126,500	12	Yes
47,500	\$247,500	\$5.00	60	20.68	127,200	12	Yes
48,000	\$250,000	\$5.00	60	20.87	128,000	12	Yes
48,500	\$252,500	\$5.00	60	21.07	128,700	12	Yes
49,000	\$255,000	\$5.00	60	21.27	129,400	12	Yes
49,500	\$257,500	\$5.00	60	21.47	130,200	12	Yes
50,000	\$260,000	\$5.00	60	21.68	130,900	13	Yes
50,500	\$262,500	\$5.00	60	21.88	131,400	13	Yes
51,000	\$265,000	\$5.00	60	22.09	131,800	13	Yes
51,500	\$267,500	\$5.00	60	22.30	132,300	13	Yes
52,000	\$270,000	\$5.00	60	22.51	132,700	13	Yes
52,500	\$272,500	\$5.00	60	22.73	133,200	13	Yes
53,000	\$275,000	\$5.00	60	22.94	133,600	13	Yes
53,500	\$277,500	\$5.00	60	23.16	134,100	13	Yes
54,000	\$280,000	\$5.00	60	23.38	134,600	14	Yes
54,500	\$282,500	\$5.00	60	23.60	135,000	14	Yes
55,000	\$285,000	\$5.00	60	23.83	135,500	14	Yes
55,500	\$287,500	\$5.00	60	24.05	135,900	14	Yes
56,000	\$290,000	\$5.00	60	24.28	136,400	14	Yes
56,500	\$292,500	\$5.00	60	24.51	136,800	14	Yes
57,000	\$295,000	\$5.00	60	24.74	137,300	14	Yes
57,500	\$297,500	\$5.00	60	24.98	137,800	14	Yes
58,000	\$300,000	\$5.00	60	25.22	138,200	15	Yes

Population	Materials Expenditures <sup>3</sup>	Materials Exp. / Capita <sup>3</sup> Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
58,500	\$302,500	\$5.00	60	25.46	138,700	15	Yes
59,000	\$305,000	\$5.00	60	25.70	139,100	15	Yes
59,500	\$307,500	\$5.00	60	25.94	139,600	15	Yes
60,000	\$310,000	\$5.00	60	26.19	140,000	15	Yes
60,500	\$312,500	\$5.00	60	26.44	140,500	15	Yes
61,000	\$315,000	\$5.00	60	26.69	141,000	15	Yes
61,500	\$317,500	\$5.00	60	26.94	141,400	15	Yes
62,000	\$320,000	\$5.00	60	27.20	141,900	16	Yes
62,500	\$322,500	\$5.00	60	27.46	142,300	16	Yes
63,000	\$325,000	\$5.00	60	27.72	142,800	16	Yes
63,500	\$327,500	\$5.00	60	27.98	143,200	16	Yes
64,000	\$330,000	\$5.00	60	28.25	143,700	16	Yes
64,500	\$332,500	\$5.00	60	28.51	144,200	16	Yes
65,000	\$335,000	\$5.00	60	28.79	144,600	16	Yes
65,500	\$337,500	\$5.00	60	29.06	145,100	16	Yes
66,000	\$340,000	\$5.00	60	29.34	145,500	17	Yes
66,500	\$342,500	\$5.00	60	29.61	146,000	17	Yes
67,000	\$345,000	\$5.00	60	29.90	146,400	17	Yes
67,500	\$347,500	\$5.00	60	30.18	146,900	17	Yes
68,000	\$350,000	\$5.00	60	30.47	147,400	17	Yes
68,500	\$352,500	\$5.00	60	30.76	147,800	17	Yes
69,000	\$355,000	\$5.00	60	31.05	148,300	17	Yes
69,500	\$357,500	\$5.00	60	31.34	148,700	17	Yes
70,000	\$360,000	\$5.00	60	31.64	149,200	18	Yes
70,500	\$362,500	\$5.00	60	31.94	149,700	18	Yes
71,000	\$365,000	\$5.00	60	32.24	150,100	18	Yes
71,500	\$367,500	\$5.00	60	32.55	150,600	18	Yes
72,000	\$370,000	\$5.00	60	32.86	151,000	18	Yes
72,500	\$372,500	\$5.00	60	33.17	151,500	18	Yes
73,000	\$375,000	\$5.00	60	33.49	151,900	18	Yes
73,500	\$377,500	\$5.00	60	33.81	152,400	18	Yes
74,000	\$380,000	\$5.00	60	34.13	152,900	19	Yes
74,500	\$382,500	\$5.00	60	34.45	153,300	19	Yes
75,000	\$385,000	\$5.00	60	34.78	153,800	19	Yes
75,500	\$387,500	\$5.00	60	35.11	154,200	19	Yes
76,000	\$390,000	\$5.00	60	35.44	154,700	19	Yes
76,500	\$392,500	\$5.00	60	35.78	155,100	19	Yes
77,000	\$395,000	\$5.00	60	36.12	155,600	19	Yes
77,500	\$397,500	\$5.00	60	36.46	156,100	19	Yes
78,000	\$400,000	\$5.00	60	36.81	156,500	20	Yes

Population	Materials Expenditures <sup>3</sup>	Materials Exp. / Capita <sup>3</sup> Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
78,500	\$402,500	\$5.00	60	37.16	157,000	20	Yes
79,000	\$405,000	\$5.00	60	37.51	157,400	20	Yes
79,500	\$407,500	\$5.00	60	37.87	157,900	20	Yes
80,000	\$410,000	\$5.00	60	38.23	158,300	20	Yes

Note<sup>3</sup>: 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
<b>Category</b>		<b>2027 Minimum To Exempt</b>
<b>\$ Materials/Capita</b>		\$6.00/capita
<b>Hours Open</b>		35
<b>FTE</b>		2.00
<b>Collection Size</b>		11,900
<b>Public Computers/Internet Access Devices</b>		2
<b>Wireless Internet Access</b>		Yes

<b>Library</b>	<b>Brookfield</b>	<b>2025 Population: 41,453</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$5.24/capita	
<b>Hours Open</b>	60	
<b>FTE</b>	18.28	
<b>Collection Size</b>	117,700	
<b>Public Computers/Internet Access Devices</b>	10	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Butler</b>	<b>2025 Population: 1,758</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$6.00/capita	
<b>Hours Open</b>	35	
<b>FTE</b>	2.00	
<b>Collection Size</b>	11,900	
<b>Public Computers/Internet Access Devices</b>	2	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Delafield</b>	<b>2025 Population: 7,240</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$6.00/capita	
<b>Hours Open</b>	48	
<b>FTE</b>	7.00	
<b>Collection Size</b>	44,900	
<b>Public Computers/Internet Access Devices</b>	2	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Eagle</b>	<b>2025 Population: 5,683</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$6.00/capita	
<b>Hours Open</b>	44	
<b>FTE</b>	5.00	
<b>Collection Size</b>	33,900	
<b>Public Computers/Internet Access Devices</b>	2	
<b>Wireless Internet Access</b>	Yes	

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

<b>Library</b>	<b>Hartland</b>	<b>2025 Population: 10,161</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$5.98/capita	
<b>Hours Open</b>	55	
<b>FTE</b>	10.00	
<b>Collection Size</b>	66,800	
<b>Public Computers/Internet Access Devices</b>	3	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Menomonee Falls</b>	<b>2025 Population: 40,945</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$5.24/capita	
<b>Hours Open</b>	60	
<b>FTE</b>	18.11	
<b>Collection Size</b>	117,000	
<b>Public Computers/Internet Access Devices</b>	10	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Merton</b>	<b>2025 Population: 8,293</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$6.00/capita	
<b>Hours Open</b>	50	
<b>FTE</b>	8.00	
<b>Collection Size</b>	52,200	
<b>Public Computers/Internet Access Devices</b>	2	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Mukwonago</b>	<b>2025 Population: 8,850</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$6.00/capita	
<b>Hours Open</b>	51	
<b>FTE</b>	8.00	
<b>Collection Size</b>	55,900	
<b>Public Computers/Internet Access Devices</b>	2	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Muskego</b>	<b>2025 Population: 25,688</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$5.39/capita	
<b>Hours Open</b>	58	
<b>FTE</b>	13.64	
<b>Collection Size</b>	95,000	
<b>Public Computers/Internet Access Devices</b>	6	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>New Berlin</b>	<b>2025 Population: 40,044</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$5.25/capita	
<b>Hours Open</b>	60	
<b>FTE</b>	17.94	
<b>Collection Size</b>	116,300	
<b>Public Computers/Internet Access Devices</b>	10	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Oconomowoc</b>	<b>2025 Population: 20,179</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$5.50/capita	
<b>Hours Open</b>	57	
<b>FTE</b>	12.22	
<b>Collection Size</b>	85,100	
<b>Public Computers/Internet Access Devices</b>	5	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Pewaukee</b>	<b>2025 Population: 24,507</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$5.41/capita	
<b>Hours Open</b>	57	
<b>FTE</b>	13.38	
<b>Collection Size</b>	93,400	
<b>Public Computers/Internet Access Devices</b>	6	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Sussex</b>	<b>2025 Population: 12,413</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$5.81/capita	
<b>Hours Open</b>	55	
<b>FTE</b>	10.41	
<b>Collection Size</b>	70,500	
<b>Public Computers/Internet Access Devices</b>	3	
<b>Wireless Internet Access</b>	Yes	

<b>Library</b>	<b>Waukesha</b>	<b>2025 Population: 71,390</b>
<b>Category</b>	<b>2027 Minimum To Exempt</b>	
<b>\$ Materials/Capita</b>	\$5.14/capita	
<b>Hours Open</b>	60	
<b>FTE</b>	32.24	
<b>Collection Size</b>	150,100	
<b>Public Computers/Internet Access Devices</b>	18	
<b>Wireless Internet Access</b>	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	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**

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

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

**Materials and Services Provided by Waukesha County Libraries**

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

DRAFT

## 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.

DRAFT

## 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.**





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

P 262.896.8080  
W [bridgeslibrarysystem.org](http://bridgeslibrarysystem.org)

To: New Berlin Public Library Board of Trustees  
From: Brittany Larson, Bridges Library System Director  
Re: Waukesha County Library Standards Certification  
Date: May 8, 2026

Wisconsin Statute 43.64(2) allows Waukesha County municipalities that tax their residents for libraries the opportunity to exempt their residents from the county library levy if two criteria are met:

- 1) The municipal tax rate for library services is equal to or greater than the rate of the county library tax, and
- 2) The library meets or exceeds the Waukesha County adopted library standards.

Exemption from the county library tax, therefore, includes two distinct actions. The municipality action required is a certification of its library tax rate. That process begins when I send out a communication to the municipality after the state releases its official Equalized Assessed Values in mid-August.

The library action requires the library board to review the information in this letter and certify the library's compliance with the various standards by completing the form beginning on page 2 of this document and returning it to the Bridges office by August 31, 2026.

The Waukesha County Board approved the current county library standards in April 2022. Information about the current plan is available here: <https://bridgeslibrarysystem.org/waukesha-county-planning-committee-2016-act-150/>. There are numeric *Minimums to Exempt* as well as *Quality Assurance Items* in the standards. This letter includes your library's specific standards-related requirements under the current plan. If the 2027-2031 Waukesha County Library Services Plan is approved by the Waukesha County Board, then those standards will go into effect for the 2027 standards process.

Please complete the documentation on pages 3-4 and then complete the *Library Board Certification of Eligibility for Exemption from County Library Tax* on page 5. Please **scan and send all pages (with signatures on page 5) to the Bridges office via email by August 31**. This form constitutes your library's certification for compliance with the library standards portion required for exemption from the Waukesha County library tax levy.

Thank you for providing outstanding library services to the citizens of Waukesha County!

**Step 1. Review your Library’s Library Service Effort Ratio (LSER) Calculation**

There is a provision in the Waukesha County Plan that allows a library to qualify for the exemption without meeting the *Minimums to Exempt*. If a library can demonstrate its ability to provide for most of the needs of its own resident by reaching its targeted Library Service Effort Ratio (LSER), it is allowed to exempt from the county library tax without meeting the numeric *Minimums to Exempt*.

The LSER is calculated as follows:

- Lending by your library to your own residents: 308,951
- PLUS lending to other library community’s residents: 37,026
- DIVIDED by total circulation by your residents at all county libraries: 356,290

Your library’s LSER is shown in Table 1 below.

**Table 1.**

New Berlin’s Library Services Effort Ratio (LSER)		Eligible for Exemption Based on LSER?
<b>Target</b>	<b>Actual</b>	<b>Pass?</b>
95%	97.11%	YES

If your LSER ratio is higher than your listed target rate, you will see a “Yes” in Table 1 above and may skip to step 3 on this form. Please note, even if there is a “Yes” listed above, you are encouraged to complete step 2 for the purposes of assessment. However, if your LSER is higher than your required target, step 2 is not required for the purposes of meeting the minimum for the standards portion of the county library tax exemption. If there is a “No” in Table 1 for your library, you must complete step 2. All libraries must complete step 3.

**Step 2: Compare your Library’s previous year’s data to your Library’s *Minimums to Exempt***

Please review the data below gathered from your library’s 2025 state annual report and indicate whether your library will meet its minimum requirements in 2026.

Please circle “Yes” or “No” in the last column in Table 2. **(Completing this table is required if LSER = “NO” in step 1.)**

**Table 2.**

Library	New Berlin		2024 Municipal Population	40,055
Category	Minimum to Exempt	Library Actuals from 2025 annual report	Met Minimum during 2025?	Will Meet Minimum in 2026? (Circle one)
Materials Expenditures/Capita	\$5.50/capita	\$5.77/capita	YES	Yes No
Number Hours Open/Week	60	67	YES	Yes No
Budgeted Staff in FTE	17.94	19.44	YES	Yes No
Collection Size	127,000	141,489	YES	Yes No
Public Computers/Internet Access Devices	21	22	YES	Yes No
Wireless Internet Access	Yes	Yes	YES	Yes No

**Step 3. Review and Report on Quality Assurance Standards for New Berlin Public Library**

Review each item and circle “Yes” or “No” in Table 3 below. **(Completing this Table is required regardless of LSER ratio.)**

**Table 3.**

Quality Assurance Standards	Library Assurance for 2026 (circle one)	
Library board member orientations are provided	Yes	No
Library website includes key board/staff contact & meeting information	Yes	No
Library board conducts director performance evaluation	Yes	No
Library budgets for professional development	Yes	No
Library has active strategic plan	Yes	No
Library has a current circulation policy	Yes	No
Library has a current collection management policy	Yes	No
Library has a current computer/internet policy	Yes	No
Library has a current meeting room use policy (if meeting room available)	Yes	No
Library has a current public behavior (rules of conduct) policy	Yes	No
Library has a current personnel policy	Yes	No

Policies are considered current if they have been adopted or reviewed within the last five years.

**Please attach narrative for any items for which the library circles “No” and describe steps planned to address the area(s) of non-compliance.** Note: For each item in tables 2 and 3, libraries are able to select “No” one time during the annual certification process for the five-year planning period.

If your library has circled “No” for an item in a previous year in tables 2 or 3, circling “No” a second time for that same item may result in the loss of ability for the municipality to exempt its residents from the county library tax.

**Library Board Certification of Eligibility for Exemption from County Library Tax**

I certify that the library board's responses related to the *Minimums to Exempt and Quality Assurance Standards* were approved by the library board and reflect the library's plan of service for 2025.

<b>Name of Library</b>	<b>New Berlin Public Library</b>
Date Form Completed:	
Library Board President Name:	
Library Board President Signature:	
Library Director's Signature:	

This form (pages 1-5) must be completed, signed, and submitted to the Bridges Library System no later than **August 31, 2026**.



## Materials Selection Policy

### Statements of Purpose

The Board of Trustees of the New Berlin Public Library has adopted the Materials Selection Policy to guide library staff, and inform the public on the methods and principles behind the selection of the materials in the library's collections. The policy directly relates the collection to the New Berlin Public Library's Vision and Mission statements.

**Vision** The New Berlin Public Library is a vital community destination open to everyone.

**Mission** Provide a welcoming space for community connections with access to materials and services that enhance education, entertainment, culture, creativity, and curiosity.

The New Berlin Public Library and its Board of Trustees supports the principles of intellectual freedom and the individual's right to open access to ideas, information, experiences, and perspectives representing multiple points of view. These principles are affirmed by the American Library Association's Library Bill of Rights, the Freedom to Read and Freedom to View statements.

### Principles

Certain principles shape the nature and use of the Library collection:

- The principle of free and open use for all and that individual choice is paramount and protected. Materials are arranged in a way to facilitate access to the information. They are not marked or identified to show approval or disapproval of contents. No restriction is placed on their use except for the purpose of protecting them from injury or theft.
- The principle that the collection covers interests and views of all ages. The selection of materials for adults is not restricted by the possibility that children or adolescents may obtain materials some consider inappropriate.
- The principle that parents are responsible for monitoring their children's viewing of library materials to offer viewpoints, provide counterpoints and balance for what they experience in the world at large, and the library in particular.

**Note:** "Materials" has the broadest possible meaning. It includes, but is not limited to, print, audiovisual, digital, electronic and physical formats.

### Responsibility and Selection

**Responsibility**— The Library Board of Trustees holds the legal authority to establish and amend library policy. Within the framework of policies adopted by the Board, the Library Director is responsible for directing staff for collection development and determines the library's budgets, selection guidelines, and organizational structure, and is accountable to both



the Board for the selections made by library staff. While staff members may recommend materials for inclusion in the collection, the Library Director retains the authority to approve or reject any item.

**Selection**—Selection refers to the decision to add and retain materials to the collection. It is based upon awareness of the diverse needs and interests of the individuals in this community, balanced against evaluation of material and knowledge of the collection’s strengths, weaknesses and artistic merit. The selection policy is also shaped by the budget, space considerations, format, and accessibility of alternative information sources.

**Selectors**— Collection development and selection of individual materials is a responsibility shared by the library’s professional librarian staff.

**Selectors are responsible for:**

- Researching, accessing peer reviews and choosing appropriate materials for the collection areas under their responsibility
- Monitoring budgets to ensure that spending is timely and organized
- Monitoring circulation of those materials
- Deselecting (weeding) collections to maintain appearance, physical condition, and relevancy standards

**Selection Criteria**

Materials are selected with the primary purpose of being useful to the general public. Because no single criterion may be applied to all materials, selectors at the New Berlin Public Library use their training, knowledge, and professional expertise to select materials for the collection.

All acquisitions, whether purchased or donated are considered in terms of one or more of the following criteria:

- Contemporary significance, permanent value, or popular interest
- Date of publication and/or timeliness of content
- Quality of writing (style, readability)
- Accuracy, reliability, scope, and complexity of subject matter
- Scarcity of information on the subject
- Literary and/or artistic merit
- Critical reception and professional reviews
- Prominence, authority, or competence of author, creator, or publisher
- Wisconsin author and/or local references
- Relation to existing collection
- Price and availability
- Suitability of physical form for library use
- Available physical space
- The special needs of library patrons for materials in accessible formats



## Collection Development

### Adult Collections

#### Non-fiction

The non-fiction collection emphasizes timely, accurate, and useful informational materials to support individual, business, government and community interests. It also emphasizes materials that are current and in high-demand. Materials are available for all ages and reading levels and in a variety of formats.

Materials are selected to represent a continuum of opinions and viewpoints when available. Titles with continued value and those of current, accepted authority are part of the library collection.

When choices exist, selection is based on readability, clarity and appeal. Requests from library users are given high priority. When demand is high, multiple copies may be purchased, subject to budget limitations.

#### Specific Criteria for the Evaluation of Works of Information and Opinion

- Authority
- Comprehensiveness and depth of treatment
- Objectivity
- Clarity, accuracy and logic of presentation
- Diversity of viewpoint/expression

#### Fiction

The fiction collection focuses on twentieth and twenty-first century literature including classic and standard titles, diverse genres, and special interests. There is no one standard for inclusion in the fiction collection. Each work is evaluated in comparison with other fiction works or authors of similar type. Because of the large volume of fiction published, it is possible to purchase only a representative selection with emphasis on major authors and the most popular examples of a genre. User and hold requests from materials of this type influence the addition of additional copies.

Fictional subgenres, such as mysteries, romances, horror, thrillers, science fiction, fantasy, western, faith, graphic novels and Wisconsin authors are purchased at a standard level. Hardcover copies are preferred to paperback because of durability. However, the paperback and trade softcover fiction collections continue to expand because of public preference, pricing and availability.

#### Specific Criteria for the Evaluation of Works of Imagination

- Representation of important movement, genre, trends, or national culture
- Literary merit
- Vitality and originality



- Artistic presentation and experimentation
- Sustained interest
- Effective characterization
- Reflection of the human experience

### **Digital Materials**

The New Berlin Public Library contributes funding support to digital materials and databases provided through state-or system-wide buying pool. Digital materials include audio, video, and electronic books, and are selected through the Wisconsin Public Library Consortium (WPLC) and the OverDrive Advantage Plus buying plan; these organizations include representatives from the Bridges Library System. The New Berlin Public Library has no direct control over the WPLC selection other than to recommend titles. Relevant selection committee and collection development policies are available at this the following: <https://wplc.info/blog/collaborative-curation-the-wdl-selection-process-did-you-know/>

### **Electronic Databases**

Databases are an integral part of the informational services the library provides. These databases are notable for their timeliness, and efficiency in locating information. The Library subscribes to a core of electronic databases through the Bridges Library System and other vendors.

### **Reference**

Many reference standards such as encyclopedias, dictionaries, handbooks, directories, bibliographies, etc., are available online and via proprietary electronic databases to which the Library subscribes. Limited print reference materials are included within the non-fiction collection for circulation. Unique local historical titles may be held in the Reference Collection or within the non-fiction collection.

### **Recordings and Books on CD**

Currently, a balanced collection of recordings are available. In order to remain responsive to public need, the Library will evaluate new developments in the field of audiovisual formats for possible inclusion in the Library's collection.

### **DVDs/Blu-Ray**

DVDs and Blu-Ray DVDs are acquired according to general selection criteria.

### **Library of Things (LoT), Experience Passes, Games and Puzzles**

The Library of Things collection is a collection of non-traditional, or occasional use items, intended to augment traditional library print collections. Library of Things items are ones that encourage experimentation, curiosity, learning, and offer self-guided recreational opportunities. Items and experiences must meet the selection criteria as well as be items reasonably assumed to be used without extensive instruction or specialized training.



## **Other Print and Digital Materials, Magazines and Newspapers**

Periodicals are serials that are issued at stated intervals, generally more frequently than annually, and which contain separate articles, stories, and other writings. Periodicals are an important source of ideas and topics before such information is available in book form. In addition, they provide recreational, how-to, and consumer information. Periodicals represent an ongoing commitment in terms of subscription costs, storage, and binding.

In general, single subscriptions of a title are maintained. Selected titles are retained for one year in hard copy. Many additional periodical titles are available through the *BadgerLink* statewide network or through *OverDrive*, the online database we purchase cooperatively through Bridges Library System. *BadgerLink* and *OverDrive* greatly enlarge the amount and scope of information available to our patrons.

*The Milwaukee Journal Sentinel*, the *Waukesha Freeman*, and *New Berlin Now* are the priority purchases of newspapers, followed by the *Wall Street Journal* and *The New York Times*. Copies of newspapers are held for a maximum of two months.

## **Young Adult Collection**

The Library makes available materials in a variety of formats that are aimed at addressing the needs and concerns of young adult users. In general, Young Adult Services is geared to the middle school and high school age, overlapping somewhat with Youth Services at one end of the range and those for adults at the other. There is, however, a wide range of users for these materials and this factor is given consideration when developing this collection.

Needs of young adults differ from needs of adult users and often look to the library for materials and resources to meet academic demands. Young adult materials are selected from the same criteria used in selection of adult materials, but with the focus of the experience, maturity and interests of young people. The themes in young adult fiction generally center on the struggle to develop an identity and set of values and to find a place in the larger community. Every effort is made to provide teenagers with fiction that deals with their concerns in open, honest ways, and which meets their recreational and academic needs.

## **Youth Services Collection**

Materials in the Youth Services collection are selected in response to the needs and interests of young people, recognizing their diverse tastes, backgrounds, abilities and potentials. In choosing materials for children, age is a determining selection principle. Materials are evaluated for reading level and treatment of the subject for the intended audience. In addition to the general criteria list, other considerations include illustrations, vocabulary and theme.



In addition, Youth Services also provides materials for parents and guardians, supplemental resources for homeschool families, and resources for teachers. The library recognizes the responsibility of parents/guardians in monitoring the use of the library by their minor children and takes no legal responsibility to act as parent/guardian to minor children. Parents/guardians may inquire with a librarian about the library's policy and procedure for placing restrictions on their child's library card.

## **AI Generated Materials**

New Berlin Public Library will make reasonable efforts not to purchase content primarily generated by artificial intelligence (AI). In this context, "primarily generated" refers to works in which AI systems produce the majority of the text, images, or other substantive content with minimal human authorship, editorial oversight, or verification. The Library recognizes that AI tools may be used as part of the creative or research process; however, materials lacking clear human accountability, demonstrable accuracy, or credible sourcing may be subject to additional scrutiny or exclusion.

### **When evaluating such works, the Library will consider these factors:**

- Transparency of authorship
- Evidence of editorial review
- Reliability and originality of the content
- Potential for misinformation, bias, or plagiarism.

These provisions are intended to support the Library's commitment to maintaining a high-quality, trustworthy collection while acknowledging the evolving role of AI in publishing.

## **Collection Maintenance**

Library collections are routinely monitored for use and relevance to the community. Items are removed from the collection or replaced using the following criteria:

- Damage, poor condition, or infestation
- No longer relevant to the needs or interests of the community
- Infrequent use or demonstrated lack of demand
- Misleading and/or factually inaccurate
- Superseded by a new edition or a better source
- Availability elsewhere including at other libraries in the Bridges System or free online sources

New Berlin Public Library reserves the right to determine how materials are weeded, removed and/or disposed of. Materials that qualify for removal from the system are often sold via the Friends of New Berlin Public Library, Inc. book sales or gift shop, donated, or recycled.



## **Donated Materials**

Donated materials are added to the library collection using the same criteria as that governing original material selection. Donations of new titles, books on special subjects, artwork or collections of unique value/or great interest, which meet the criteria, are processed. Used books in good condition are evaluated for potential use as duplicates, replacements, or new titles. If they warrant the expense of processing, they are added to the collection.

The Library Director and designated staff will determine whether gifted materials in good condition, but not needed, will be donated to the Friends of New Berlin Public Library, Inc., the proceeds of which are used to benefit the Library. The Library will not accept donations with odor, water damage, rot or bug infestation and will determine how to dispose of those donated. The Library is not responsible for the appraisal of gifts for income tax or any other purposes.

Donations of materials are accepted by the New Berlin Public Library with the understanding that all donated items become property of the Library in accordance to Wis. Stat. § 43.58(7), and will not be returned to the donor. No conditions may be imposed to any gift after its acceptance by the Library.

## **New Formats and Technologies**

Printed material for all age groups remain the cornerstone of the collection at New Berlin Public Library; however, the library has regularly expanded its collections to include materials in new formats as they become relevant to the general public and makes sense for circulating library collections. New formats shall be considered for the circulating collection taking into consideration the availability of titles, cost per item, and the library's ability to package and sustainably circulate the new format. Similar considerations will influence decisions to no longer circulate a format from the library's collection.

## **Self-Published Materials**

The New Berlin Public Library recognizes the importance of supporting and preserving the creative work of its community and understands the changing nature of the publishing industry. Guidelines and the submission form for self-published materials is available with a Librarian or on the Library's website at: <https://www.newberlinlibrary.org/policies/self-published-materials>

## **Recommendation and Reconsideration of Library Materials**

The New Berlin Public Library recognizes that some library materials may be considered controversial, and that certain items may be offensive to some patrons. Selection of materials is not made on the basis of anticipated approval or disapproval, but solely on the basis of the principles stated in this collection policy. The public has a right to request materials be purchased for the collection and to question material currently in the collection. Materials Selection Inquiry forms are available with a Librarian or on the Library's website at: <https://www.newberlinlibrary.org/policies>

# Trustee

Trust-ee | /tre ' ste/

Noun

One to whom something is entrusted.

## Why a Citizen Library Board?

- ✓ Isolates library operations from political pressure.
- ✓ Ensures that the library collection is developed independently of any particular political viewpoint.
- ✓ Means the library is governed by the same people the library serves: the public.

## Library Advocacy

Being a library trustee means that you have been entrusted with the welfare of an important community institution capable of serving everyone in your community. As guardians of the public trust, a trustee's first loyalty is to the library and to the community it serves.

Understanding the value of the library and being able to communicate it with decision-makers is one of the most important obligations of a board member.

## The Board Governs- The Staff Manages

**Governance:** Library board members are responsible for the **direction** of the organization. They make major decisions including approving plans and policies. They are responsible for employing a qualified and competent library director. They also have an important advocacy role.

**Management:** The Director is responsible for the overall **operation** of the organization, implementing board decisions, and keeping the board informed.

## Three Legal Duties of a Board Member

### Duty of Care

You are responsible to care, to participate actively in making decisions on behalf of the organization, and to exercise your best judgement.

### Duty of Loyalty

When acting on behalf of the organization, you must set aside personal and professional interests and put the organization's needs first.

### Duty of Obedience

You are responsible for ensuring that the organization remains true to its mission, complying with its governing documents and all applicable federal and state laws.

## Specific Responsibilities

1. Determine the organization's mission and purpose.
2. Select the library director.
3. Support and evaluate the library director.
4. Ensure effective planning.
5. Monitor and strengthen programs and services.
6. Ensure adequate financial resources.
7. Protect assets and provide financial oversight.
8. Build a competent board.
9. Ensure legal and ethical integrity.
10. Enhance the organization's public standing.



## Role of the Board President

The President must find a balance between efficient decision making and allowing full discussion. The role of the President includes:

- To open the meeting and call members to order at the agreed upon time after legal public notice has been given.
- To recognize members entitled to the floor.
- To ensure that a few members do not dominate discussions. All members should have a chance to be heard.
- To state and put to vote all questions which are moved, and to announce the results of the vote.
- To enforce the observance of order and decorum among members as well as all legal requirements.
- To ensure that the library board members understand the importance of acting as a body, not as individuals.

---

## Bylaws

A set of rules established by the library board that govern the board's own activities. Well crafted bylaws help provide for the smooth and effective function of a library board. Library board bylaws must comply with all relevant statutes.

**At a minimum, bylaws should indicate:**

- The library board officers to be elected, how they are elected, and the powers and responsibilities for each officer.
- When the meetings are held and how meetings are conducted.
- What committees are appointed, how they are appointed, and what they do.
- How the bylaws are amended.

Library board bylaws should never prescribe term limits. The municipality making the appointment makes its own decisions regarding terms of their appointees.

## Best Practices for Board Meetings

### Have an Agenda

Board chair and library director should work together to create and share an agenda, along with any related information, to board members about 7 days in advance.

### Be Punctual

Start and end meetings on time.

### Make Decisions

Be sure to make decisions, not just hear updates.

### Keep A Record

Make sure someone is taking the minutes of the meeting and they are distributed as quickly as possible after the meeting to update board members who were unable to attend.

### Have Fun!

Bring food, sit in different seats, and read testimonials and thank you notes.



## Sources

[American Library Association](#)

[Boardsource.org](#)

[Iowa Library Trustee's Handbook](#)

[Trustee Essentials: A Handbook for Wisconsin Public Library Trustees](#)

[WebJunction](#)

[Wisconsin Attorney General's Open Meeting Law Compliance Guide](#)

[Wisconsin Statutes](#)

[Wisconsin Trustee Training Module: Library Board Powers and Duties](#)

# Who Runs the Library: Guidelines to Roles & Responsibilities in Wisconsin's Public Libraries

Responsibilities of:	Library Board	Library Director	Municipality	Friends & Foundations
<b>Administration</b>	Generally oversee the administration of the library and appoint a head librarian (director) who administers the daily operation of the library.	Administer daily operation of the library, including maintenance of library facilities and equipment. Advise the board and provide support to community groups.	Appoint trustees who serve on the library board.	Support quality library service in the community through fundraising, volunteerism, and serving as advocates for the library.
<b>Policy</b>	Adopt written policies to govern the operation and program of the library.	Apprise library board of need for new policies, as well as policy revisions. Implement the policies adopted by the library board.	Support the policies of the library as adopted by the library board.	Support the policies of the library as adopted by the library board.
<b>Personnel</b>	Recruit, hire, and supervise an appropriately certified library director. Help determine and advocate for competitive staff salaries and benefits.	Hire, train, supervise, and schedule all other library personnel. Keep library board informed of important issues and consult with the board before making significant personnel decisions.	Offer assistance to the library director and board regarding state and federal employment laws. Maintain payroll. All library staff are municipal employees.	Communicate with library staff through the library director or the director's specified point of contact.
<b>Planning</b>	Assist in the formulation and adoption of a strategic plan that has implementation and evaluation components.	Coordinate and implement a strategic plan with library board, Friends, library foundation, staff and community.	Provide input into the library's strategic plan and support its implementation.	Provide input into the library's strategic plan and support its implementation.
<b>Budgets</b>	Seek adequate funds to carry out library operations. Assist in the preparation and presentation of the annual budget.	Oversee the library budget and prepare the annual budget and reports as required by the board.	Appropriate an annual budget with enough funds for the library to successfully carry out operations according to its approved mission and plans.	Conduct fundraising to support the library's mission and plans.
<b>Expenditures</b>	Audit and approve all library expenditures (as well as lands, buildings, money, and property).	Order materials and supplies within the library's approved budget. Submit invoices to the board for monthly audit and approval.	Act as custodian of most library funds and appropriations; pay library board approved library expenditures. Assist with purchasing, facilities, etc.	Support the library by providing financial support for priorities set by the library board and staff that may fall outside the municipal budget.
<b>Meetings</b>	Participate in all board meetings. Appoint a liaison to the Friends Board and become a member of the Friends.	Participate in library board and Friends meetings. Ensure that there is a liaison from the board to the Friends and vice versa.	Maintain no more than one appointment to the library board.	Maintain a liaison to the library board.
<b>Networking</b>	Join the Wisconsin Library Trustees and Friends (WLTF), a division of WLA, to network with others and learn more about policies, operations, and advocacy.	Build relationships with municipal board and staff, Friends; educate these groups about the value of public libraries; encourage membership in professional organizations.	Stay informed of library issues at local, state, and federal levels. Include the library director in department head meetings and community activities.	Join the Wisconsin Library Trustees and Friends (WLTF), a division of WLA, to network with others and learn more about supporting libraries.