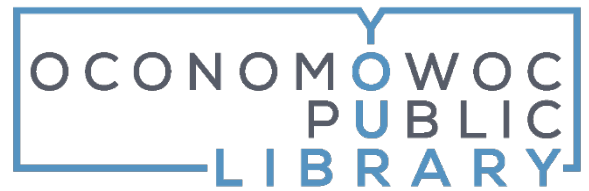


BOARD OF TRUSTEES MEETING PACKET



AUGUST 2025

AGENDA(s)

- Regular Board Meeting - Monday, August 18, 2025 • 6 pm

AGENDA REPORT

MINUTES/COMMITTEE NOTES

- Regular Meeting Minutes – June 16, 2025

REPORTS

- Finance Report
- Vouchers
- Monthly Statistics Report
- Quarterly Statistics Report

COMMUNICATIONS/ANNOUNCEMENTS

- Bridges Staff Reports

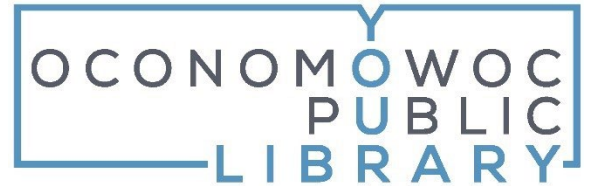
DIRECTOR'S REPORT

ATTACHMENTS

- Sweeny Group Brainstorming Agenda
- 2026 Draft Budget Request
- Q2 Strategic Plan Update

OCONOMOWOC PUBLIC LIBRARY

BOARD OF TRUSTEES



REGULAR BOARD MEETING

MONDAY, AUGUST 18, 2025 • 6 PM

LYKE MEETING ROOM

OCONOMOWOC PUBLIC LIBRARY

Board Members please notify the Library Administrative Coordinator at (262) 569-2193, ext. 203 or sbartholomew@oconomowoclibrary.org if you are unable to attend.

AGENDA

I. REGULAR ORDER OF BUSINESS

- A. Call to Order-Ascertain Posting of Agenda-Members Present
- B. Minutes of Previous Meeting
- C. Comments from Audience
- D. Finance and Statistic Reports
- E. Present Vouchers for Payment
- F. Communications and Announcements

II. REPORTS

- A. Committee Reports (only bold committees will present)
 - 1. Planning Committee - B. Nankee, K. Hansen
Last Meeting - December 5, 2022; Next Meeting - to be scheduled
 - 2. Nominating Committee - K. Hansen, B. Nankee, M. Wood, S. Lammers, B. Elwood-Goetsch, J. Hooper
Last Meeting - May 16, 2024; Next Meeting - to be scheduled
 - 3. Finance Committee - B. Nankee, S. Lammers, E. Ludwig, K. Kennedy
Last Meeting - June 28, 2023; Next Meeting - to be scheduled
 - 4. Operations Committee - TBD
Last Meeting - September 8, 2022; Next Meeting - to be scheduled

- B. Library Director's Report*

III. NEW BUSINESS

- A. Feasibility Study Brainstorming Session with Sweeney Group
- B. Consider/Act on approving 2026 Operating Budget Request
- C. Consider/Act on new position, "Library Marketing Specialist"
- D. Discuss Second Quarter Strategic Plan Progress Report

IV. BOARD REMARKS

- A. Board President Remarks
- B. Board Member Remarks

V. ADJOURN

* Library Director's Report may include information on Budget/Finance, Building/Facilities, Collection Development/Reference, Communications, Continued System Involvement/Automation, Friends of OPL, Fundraising, Library Operations, Personnel/Continuing Education, Planning, Programming, and/or Public Relations.

NOTICE

If a person with a disability requires that the meeting be accessible or that materials at the meeting be in an accessible format, notify the Library's Administrative Coordinator at (262) 569-2193, ext. 203 or sbartholomew@oconomowoclibrary.org, at least 48 hours in advance of the meeting to request adequate accommodations. Members of other City governmental bodies (boards, commissions, committees, council, etc.) may attend the above noticed meeting of the Oconomowoc Public Library Board of Trustees in order to gather information. The only action to be taken at the above noticed meeting will be action by the Oconomowoc Public Library Board of Trustees.

NEW BUSINESS

A. Feasibility Study Brainstorming Session with Sweeney Group

The Sweeney Group will brainstorm with the Library Board regarding fund raising.

B. Consider/Act on approving 2026 Operating Budget Request

The draft request is included in your packet. At this point in time, we do not have wages and benefits included, which will be provided by the City, and some lines have tentative numbers from Bridges, including Waukesha County Funding (Line 3720), Services Non-IT (Line 210), and E-media (Line 325).

C. Consider/Act on new position, "Library Marketing Specialist"

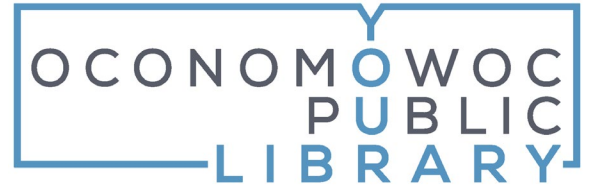
Please look over job description.

D. Discuss Second Quarter Strategic Plan Progress Report

Progress made in the Strategic Plan. Quarterly statistics will be in the board packet.

OCONOMOWOC PUBLIC LIBRARY

BOARD OF TRUSTEES



REGULAR MEETING MINUTES

JUNE 16, 2025

MEMBERS PRESENT

Ben Nankee, Dani Clarkson, Sandee Lammers, Erik Ludwig, Kerry Hansen, Melissa Wood, Kate Kennedy, Matt Mulder, Melissa Howe

MEMBERS ABSENT

STAFF PRESENT

Jen Puccini, Shannon Bartholomew

REGULAR ORDER OF BUSINESS

A. CALL TO ORDER-ASCERTAIN POSTING OF AGENDA-MEMBERS PRESENT

Ben Nankee called the meeting to order at 6:02 pm. Agenda was properly posted.

B. MINUTES OF PREVIOUS MEETING

Kerry Hansen moved to approve the minutes of the May 19, 2025 Regular Board Meeting. Matt Mulder seconded and motion carried.

C. COMMENTS FROM AUDIENCE

No comments from the audience.

D. FINANCE AND STATISTIC REPORTS

The May 2025 Financial Report was reviewed.

The May 2025 Statistical Report was reviewed.

E. PRESENT VOUCHERS FOR PAYMENT

Erik Ludwig moved to approve the May 2025 vouchers totaling \$16,830.71. Kerry Hansen seconded and motion carried.

F. COMMUNICATIONS & ANNOUNCEMENTS

The newsletter and recent articles were provided at the board meeting.

REPORTS

A. COMMITTEE REPORTS (ONLY BOLD COMMITTEES WILL PRESENT)

Planning Committee – B. Nankee, K. Hansen

Last Meeting – December 5, 2022; Next Meeting – to be scheduled

Nominating Committee – K. Hansen, B. Nankee, M. Wood, S. Lammers,

Last Meeting – May 16, 2024; Next Meeting – to be scheduled

Finance Committee – B. Nankee, S. Lammers, E. Ludwig, K. Kennedy

Last Meeting – June 28, 2023; Next Meeting – to be scheduled

Operations Committee – TBD

Last Meeting - September 8, 2022; Next Meeting – to be scheduled

B. DIRECTOR'S REPORT

Building/Facilities

We have a new IT service: Taylor Computer Services, Inc. They were highly recommended and are located in Pewaukee. Joe Di Mario has retired after being with us since 2000.

The Library building was closed July 4-5.

Don Murray and his crew have replaced the tiles above the Checkout Desk. They look great.

Friends of OPL

Thanks to Friends we were selected for Fox Bros. Piggly Wiggly Charity of the Month campaign for April which focused on Historical Organizations and Library Groups that encourage learning through history

and reading. Throughout the month, each Fox Bros. store collected donations, tracked roundups at the checkout, and gathered loose change.

Personnel/Continuing Education

Debra Krause's, one of our part-time reference librarians, last day was June 28.

Programming

Summer reading has begun and we had 368 people attend our summer reading kick-off on Friday, June 6. As of the morning of Day 9 of SRP, we had 1,382 people signed up for summer reading. Events are being well-received and many registrations are full.

NEW BUSINESS

A. CONSIDER/ACT ON ELECTING LIBRARY BOARD OFFICERS FOR 2025-2026: PRESIDENT, VICE PRESIDENT, AND SECRETARY

Per the board's bylaws, newly elected officers will assume their duties at the conclusion of the June board meeting.

Kerry Hansen moved to approve on electing Library Board officers for 2025-2026: President: Kerry Hansen, Vice President: Erik Ludwig, Secretary: Kate Kennedy. Kate Kennedy seconded and motion carried.

B. CONSIDER/ACT ON UPDATING MEETING ROOM POLICY (FIRST READING)

The proposed update is included in your packet. Erik Ludwig moved to approve updating the Meeting Room Policy (First Reading) and waive the second reading. Kerry Hansen seconded and motion carried

C. CONSIDER/ACT ON APPROVING PROPOSAL FOR FEASIBILITY STUDY

Recommendation is based on the reviews compiled from the combined technical/cost scores.

Kerry Hansen moved to approve The Sweeny Group for the Library Feasibility Study. Kate Kennedy seconded and motion carried.

D. DISCUSS HOOPLA

Director Jen Puccini provided an update from the last director's meeting. Hoopla will be going away at the end of 2025.

E. DISCUSS UNSTAFFED BRANCH

Library Director Jen Puccini has gathered cost information for an unstaffed branch. Ben Nankee recognized Alderman Rosek to join the discussion on the next steps to move ahead with an unstaffed branch in 2026.

BOARD REMARKS

A. BOARD PRESIDENT REMARKS

No Board President remarks.

B. BOARD MEMBER REMARKS

Board members thanked Ben Nankee for his work as Board President for the last two years. Erik Ludwig suggested we should have a sub-committee for the unstaffed branch details.

ADJOURN

Erik Ludwig moved to adjourn the meeting at 6:51 pm. Kate Kennedy seconded and the motion carried.

Shannon Bartholomew, Administrative Coordinator

TOTAL BUDGET	\$1,380,649		BUDGET EXPENDED	58%	YR PASSED
	\$733,031	53%	BUDGET REMAINING	42%	YR REMAINING
	\$647,618	47%			

REVENUE																	
COUNTY FUNDING	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% RECEIVED
WAUKESHA	3720	-	-	-	184,923	-	-	-	-	-	-	-	-	184,923	215,493	369,417	50%
INTERSYSTEM FUNDING	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% RECEIVED
DODGE	3721	-	29,114	-	-	-	-	-	-	-	-	-	-	29,114	16,983	29,114	100%
JEFFERSON	3721	-	87,631	-	-	-	-	-	-	-	-	-	-	87,631	51,118	87,631	100%
WASHINGTON	3721	-	-	882	-	-	-	-	-	-	-	-	-	882	515	882	100%
TOTAL COUNTY FUNDING	2025	\$ -	\$ 116,745	\$ 882	\$ 184,923	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 302,550	\$ 284,109	\$ 487,044	62%
	2024	\$ -	\$ 129,475	\$ -	\$ 171,279	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 171,279	\$ -	\$ -	\$ 472,033	\$ 471,764	\$ 471,764	100%
	2023	\$ -	\$ 141,203	\$ -	\$ 162,199	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 162,199	\$ -	\$ -	\$ 465,601	\$ 465,483	\$ 465,483	100%
PUBLIC SERVICE CHARGES	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% RECEIVED
FINES & FEES	6114	1,075	1,800	886	2,203	732	1,583	982	-	-	-	-	-	9,260	8,750	15,000	62%
COPYING	6116	586	842	342	1,295	630	557	450	-	-	-	-	-	4,703	4,083	7,000	67%
ROOM RENTAL	6741	50	88	-	210	-	280	-	-	-	-	-	-	628	350	600	105%
TOTAL SERVICE CHARGES	2025	\$ 1,711	\$ 2,729	\$ 1,227	\$ 3,708	\$ 1,362	\$ 2,421	\$ 1,432	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,590	\$ 13,183	\$ 22,600	65%
	2024	\$ 1,306	\$ 2,455	\$ 2,152	\$ 2,008	\$ 1,985	\$ 2,114	\$ 2,134	\$ 2,363	\$ 2,499	\$ 2,027	\$ 1,761	\$ 1,596	\$ 24,399	\$ 22,100	\$ 22,100	110%
	2023	\$ 1,796	\$ 1,922	\$ 2,575	\$ 2,204	\$ 1,462	\$ 2,172	\$ 2,355	\$ 1,603	\$ 2,831	\$ 2,495	\$ 1,607	\$ 2,111	\$ 25,132	\$ 23,400	\$ 23,400	107%
MISC REVENUE	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% RECEIVED
SALE OF PROPERTY	8310	-	-	-	-	-	606	-	-	-	-	-	-	606	-	-	-
PCARD REBATE	8430	-	-	-	-	-	-	-	-	-	-	-	-	-	2,042	3,500	0%
TOTAL MISC REVENUE	2025	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 606	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 606	\$ 1,688	\$ 3,500	17%
	2024	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 728	\$ -	\$ 730	\$ -	\$ -	\$ -	\$ 715	\$ 2,172	\$ 1,328	\$ 3,500	62%
	2023	\$ -	\$ -	\$ 513	\$ -	\$ 752	\$ -	\$ -	\$ 578	\$ -	\$ -	\$ -	\$ -	\$ 1,843	\$ 1,657	\$ 3,500	53%
DONATIONS	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% RECEIVED
GENERAL	8501	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL DONATIONS	2025	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	2024	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	2023	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL DEPARTMENT REVENUE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% RECEIVED	
TOTAL DEPT REVENUE	2025	\$ 1,711	\$ 119,474	\$ 2,110	\$ 188,631	\$ 1,362	\$ 3,027	\$ 1,432	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 317,747	\$ 299,334	\$ 513,144	62%
	2023	\$ 1,796	\$ 143,125	\$ 3,088	\$ 164,403	\$ 2,214	\$ 2,172	\$ 2,355	\$ 2,181	\$ 2,831	\$ 164,694	\$ 1,607	\$ 2,111	\$ 492,576	\$ 492,383	\$ 492,383	100%
	2023	\$ 1,796	\$ 143,125	\$ 3,088	\$ 164,403	\$ 2,214	\$ 2,172	\$ 2,355	\$ 2,181	\$ 2,831	\$ 164,694	\$ 1,607	\$ 2,111	\$ 492,576	\$ 492,383	\$ 492,383	100%
CITY FUNDING	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% RECEIVED	
TOTAL CITY FUNDING	2025	\$ 115,124	\$ (23,645)	\$ 126,807	\$ (94,829)	\$ 86,465	\$ 105,535	\$ 99,827	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 415,284	\$ 506,045	\$ 867,505	48%
	2024	\$ 72,480	\$ 7,504	\$ 134,478	\$ (74,129)	\$ 89,566	\$ 103,382	\$ 94,516	\$ 122,122	\$ 96,614	\$ (83,577)	\$ 93,395	\$ 123,980	\$ 780,330	\$ 854,560	\$ 854,560	91%
	2023	\$ 1,796	\$ 143,125	\$ 3,088	\$ 164,403	\$ 2,214	\$ 2,172	\$ 2,355	\$ 2,181	\$ 2,831	\$ 164,694	\$ 1,607	\$ 2,111	\$ 492,576	\$ 492,383	\$ 492,383	100%

EXPENSES																	
WAGES AND BENEFITS	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% EXPENDED
FT SALARIES	111	44,690	38,874	38,874	38,933	38,992	39,058	39,123	-	-	-	-	-	278,546	303,511	520,305	54%
PT W/BEN	113	4,265	3,560	3,830	4,146	4,081	3,577	4,238	-	-	-	-	-	27,698	42,754	73,292	38%
PT W/OUT BEN	125	12,169	10,872	11,488	11,096	11,235	10,842	9,229	-	-	-	-	-	76,931	79,100	135,599	57%
SUNDAY HOURS	126	1,128	920	925	688	656	-	-	-	-	-	-	-	4,317	4,852	8,318	52%
LONGEVITY	133	12	6	6	6	-	6	6	-	-	-	-	-	42	42	72	58%
FICA	151	4,524	3,953	4,021	4,002	4,171	3,896	3,828	-	-	-	-	-	28,395	32,873	56,353	50%
WRS RETIREMENT	152	4,447	2,969	2,988	3,009	3,008	2,964	3,014	-	-	-	-	-	22,400	24,068	41,260	54%
HEALTH INSURANCE	154	19,328	12,885	12,885	12,885	6,443	12,885	12,885	-	-	-	-	-	90,197	101,916	174,714	52%
LIFE INSURANCE	155	93	93	93	93	93	98	98	-	-	-	-	-	662	667	1,143	58%
COMP EARNED	164	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL WAGES & BENEFITS	2025	\$ 90,657	\$ 74,133	\$ 75,112	\$ 74,859	\$ 68,680	\$ 73,326	\$ 72,422	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 529,188	\$ 589,783	\$ 1,011,056	52%
	2024	\$ 59,148	\$ 76,980	\$ 113,511	\$ 76,842	\$ 70,741	\$ 72,829	\$ 71,015	\$ 104,655	\$ 71,111	\$ 73,354	\$ 65,274	\$ 91,172	\$ 946,631	\$ 993,770	\$ 993,770	95%
	2023	\$ 57,351	\$ 72,263	\$ 106,757	\$ 78,044	\$ 64,904	\$ 58,850	\$ 62,643	\$ 67,791	\$ 107,193	\$ 71,677	\$ 72,292	\$ 80,948	\$ 900,715	\$ 938,565	\$ 938,565	96%

	\$369,593		BUDGET		
OPERATING BUDGET	\$203,843	55.2%	EXPENDED	58%	YR PASSED
	\$165,750	44.8%	REMAINING	42%	YR REMAINING

OPERATING EXPENSES																	
PURCHASED SERVICES	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% EXPENDED
SERVICES NON-IT	210	1,101	1,156	23,671	3,578	1,618	1,802	1,314	-	-	-	-	-	34,241	26,359	45,187	76%
SERVICES IT	211	-	1,352	1,571	1,150	665	1,370	3,414	-	-	-	-	-	9,522	7,583	13,000	73%
PROGRAMS	212	1,976	567	386	1,692	1,848	1,402	910	-	-	-	-	-	8,781	9,333	16,000	55%
ELECTRIC & WATER	222	1,965	1,827	2,061	2,125	2,242	3,076	3,716	-	-	-	-	-	17,012	18,667	32,000	53%
GAS & HEAT	224	-	1,874	1,537	819	725	285	116	-	-	-	-	-	5,355	6,417	11,000	49%
PHONE	225	-	56	56	56	56	56	56	-	-	-	-	-	336	434	744	45%
INTERNET	226	160	367	362	362	362	476	1,029	-	-	-	-	-	3,118	3,465	5,940	52%
MAINT CONT NON-IT	240	57	284	401	624	62	326	1,056	-	-	-	-	-	2,810	4,075	6,985	40%
MAINT CONT IT	241	-	-	-	-	-	-	-	-	-	-	-	-	-	2,100	3,600	0%
TOTAL SERVICES	2025	\$ 5,258	\$ 7,483	\$ 30,046	\$ 10,407	\$ 7,578	\$ 8,792	\$ 11,610	\$ -	\$ -	\$ -	\$ -	\$ -	81,175	\$ 78,433	\$ 134,456	60%
	2024	\$ 4,356	\$ 30,038	\$ 7,863	\$ 8,179	\$ 8,371	\$ 10,149	\$ 10,139	\$ 10,863	\$ 6,998	\$ 5,618	\$ 5,836	\$ 11,184	\$ 119,595	\$ 129,281	\$ 129,281	93%
	2023	\$ 6,651	\$ 7,020	\$ 30,071	\$ 8,641	\$ 7,450	\$ 6,753	\$ 9,278	\$ 8,268	\$ 7,098	\$ 7,600	\$ 7,877	\$ 13,235	\$ 119,941	\$ 124,747	\$ 124,747	96%

OPERATING EXPENSES	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% EXPENDED
POSTAGE	311	-	-	-	114	-	-	-	-	-	-	-	-	114	210	360	32%
PRINTING	313	-	-	-	-	-	-	-	-	-	-	-	-	-	233	400	0%
MEMBERSHIP DUES	320	50	-	-	-	210	-	-	-	-	-	-	-	260	473	810	32%
BOOKS	321	5,924	5,867	5,990	453	2,163	13,576	9,137	-	-	-	-	-	43,108	53,667	92,000	47%
SERIALS/PERIODICALS	322	5,445	85	367	-	-	90	-	-	-	-	-	-	5,988	3,792	6,500	92%
AUDIO VISUAL	323	675	813	909	787	1,612	1,316	1,414	-	-	-	-	-	7,526	8,167	14,000	54%
LIC/PERMIT	324	148	-	1,269	79	-	260	-	-	-	-	-	-	1,756	2,135	3,660	48%
E-MEDIA	325	4,843	1,700	9,123	53	65	1,805	1,776	-	-	-	-	-	19,365	13,771	23,608	82%
PUBLICITY	326	-	-	-	-	68	50	-	-	-	-	-	-	118	408	700	17%
TRAINING & TRAVEL	330	315	20	-	92	64	111	116	-	-	-	-	-	718	2,333	4,000	18%
CAR ALLOWANCE	332	17	11	11	11	11	11	11	-	-	-	-	-	83	84	144	58%
OPERATING SUPPLIES	340	574	864	2,623	3,409	1,964	3,438	1,187	-	-	-	-	-	14,059	17,558	30,100	47%
COMP/TECH EQUIPMENT	345	-	1,749	310	70	110	554	147	-	-	-	-	-	2,940	6,067	10,400	28%
TOTAL OPERATING	2025	\$ 17,992	\$ 11,109	\$ 20,601	\$ 5,067	\$ 6,266	\$ 21,212	\$ 13,789	\$ -	\$ -	\$ -	\$ -	\$ -	96,036	\$ 108,898	\$ 186,682	51%
	2024	\$ 6,571	\$ 28,398	\$ 12,088	\$ 10,621	\$ 9,410	\$ 15,617	\$ 12,320	\$ 6,318	\$ 17,929	\$ 6,457	\$ 20,582	\$ 31,835	\$ 178,147	\$ 181,733	\$ 181,733	98%
	2023	\$ 9,592	\$ 21,287	\$ 17,159	\$ 11,228	\$ 14,785	\$ 9,502	\$ 5,625	\$ 18,432	\$ 5,525	\$ 13,536	\$ 29,007	\$ 23,566	\$ 179,243	\$ 183,793	\$ 183,793	98%

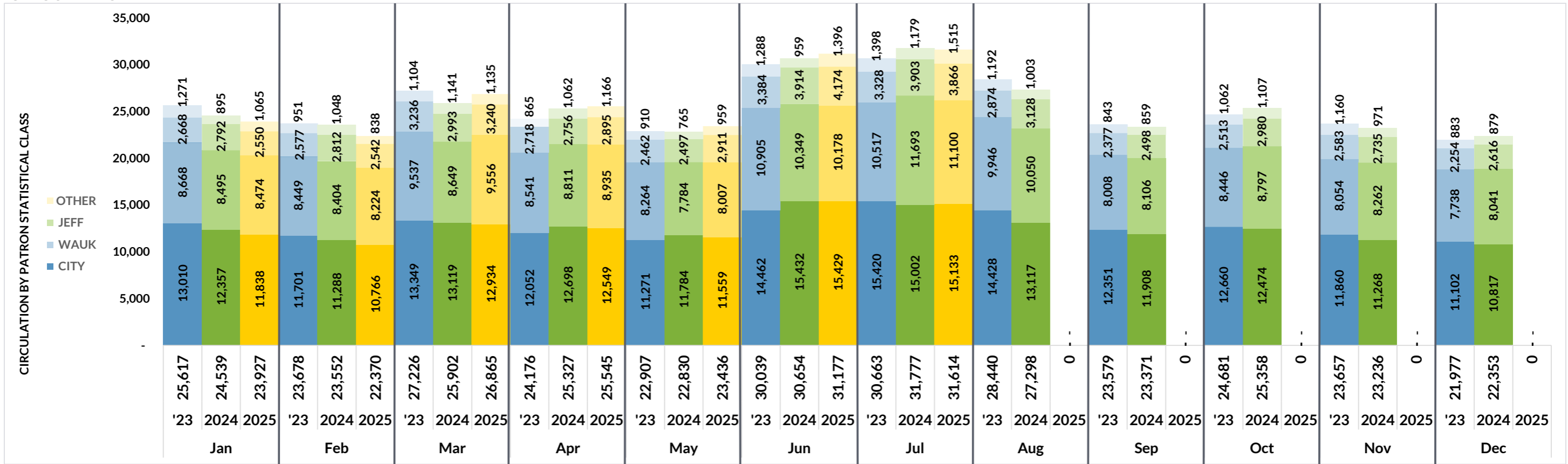
MAINTENANCE	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% EXPENDED
REPAIR/MAINT BUILDING	400	-	122	12	277	2,375	2,250	193	-	-	-	-	-	5,229	5,833	10,000	52%
REPAIR/MAINT GROUNDS	410	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
REPAIR/MAINT EQUIP	435	-	-	5	-	-	-	79	-	-	-	-	-	85	438	750	11%
TOTAL MAINTENANCE	2025	\$ -	\$ 122	\$ 17	\$ 277	\$ 2,375	\$ 2,250	\$ 272	\$ -	\$ -	\$ -	\$ -	\$ -	5,313	\$ 6,271	\$ 10,750	49%
	2024	\$ 697	\$ 1,030	\$ 102	\$ 527	\$ 40	\$ 4,640	\$ 186	\$ 390	\$ 86	\$ 1,481	\$ 373	\$ 199	\$ 9,752	\$ 10,750	\$ 10,750	91%
	2023	\$ -	\$ 144	\$ 101	\$ 1,205	\$ 378	\$ 3,406	\$ 4,452	\$ 577	\$ 44	\$ 381	\$ 13	\$ 5,915	\$ 16,616	\$ 10,500	\$ 10,500	158%

FIXED CHARGES	ACCT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% EXPENDED
TECHNOLOGY	509	838	838	838	838	838	838	838	-	-	-	-	-	5,868	5,868	10,060	58%
RISK MANAGEMENT	510	2,011	2,011	2,011	2,011	2,011	2,011	2,011	-	-	-	-	-	14,076	14,076	24,130	58%
COPIER LEASE	530	79	132	291	344	79	132	317	-	-	-	-	-	1,374	2,050	3,515	39%
TOTAL FIXED CHARGES	2025	\$ 2,928	\$ 2,982	\$ 3,140	\$ 3,193	\$ 2,928	\$ 2,982	\$ 3,166	\$ -	\$ -	\$ -	\$ -	\$ -	21,318	\$ 21,995	\$ 37,705	57%
	2024	\$ 3,014	\$ 2,989	\$ 3,067	\$ 2,989	\$ 2,989	\$ 2,989	\$ 2,989	\$ 2,989	\$ 2,989	\$ 2,819	\$ 3,090	\$ 3,084	\$ 35,994	\$ 36,390	\$ 36,390	99%
	2023	\$ 2,686	\$ 2,935	\$ 3,184	\$ 2,935	\$ 2,935	\$ 2,935	\$ 2,935	\$ 2,935	\$ 2,935	\$ 2,935	\$ 2,935	\$ 2,935	\$ 35,219	\$ 35,745	\$ 35,745	99%

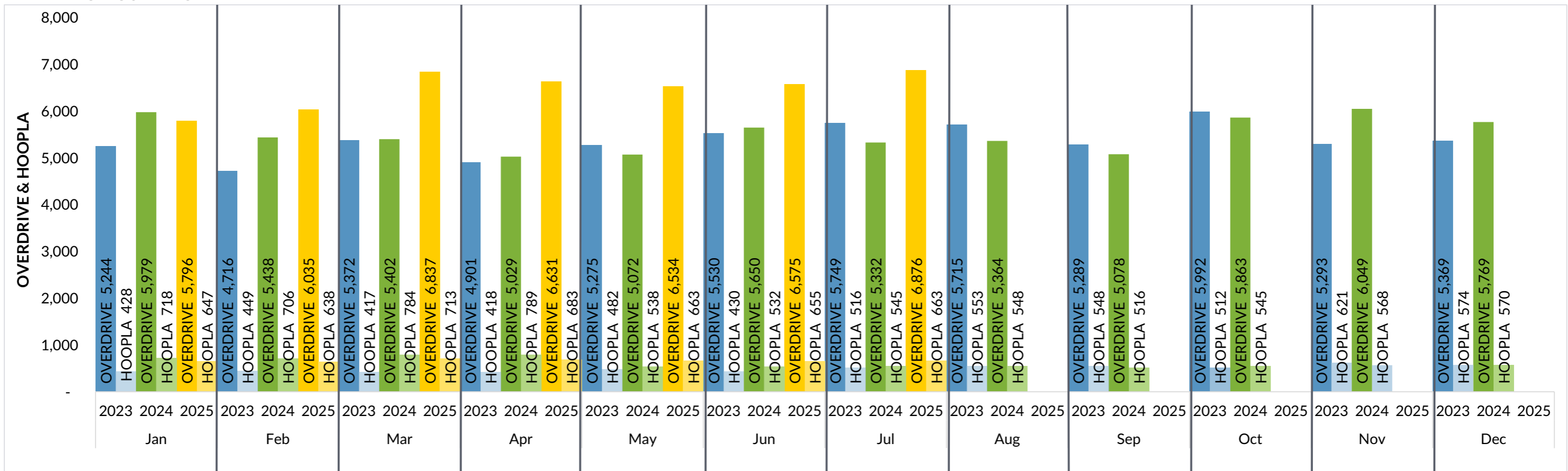
TOTAL OPERATING BUDGET		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% EXPENDED
	2025	\$ 26,178	\$ 21,696	\$ 53,805	\$ 18,944	\$ 19,147	\$ 35,236	\$ 28,837	\$ -	\$ -	\$ -	\$ -	\$ -	203,843	\$ 215,596	\$ 369,593	55%
	2024	\$ 14,638	\$ 62,455	\$ 23,120	\$ 22,316	\$ 20,810	\$ 33,395	\$ 25,635	\$ 20,559	\$ 28,002	\$ 16,374	\$ 29,882	\$ 35,118	\$ 332,303	\$ 358,154	\$ 358,154	93%
	2023	\$ 18,929	\$ 31,386	\$ 50,515	\$ 24,008	\$ 25,548	\$ 22,595	\$ 22,289	\$ 30,212	\$ 15,602	\$ 24,452	\$ 39,832	\$ 32,417	\$ 337,784	\$ 354,785	\$ 354,785	95%

TOTAL BUDGET		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD ACTUAL	YTD BUDGET	BUDGET	% EXPENDED
	2025	\$ 116,835	\$ 95,829	\$ 128,917	\$ 93,803	\$ 87,827	\$ 108,562	\$ 101,259	\$ -	\$ -	\$ -	\$ -	\$ -	733,031	\$ 805,379	\$1,380,649.36	53%
	2024	\$ 73,786	\$ 139,434	\$ 136,630	\$ 99,158	\$ 91,551	\$ 106,224	\$ 96,649	\$ 125,215	\$ 99,113	\$ 89,729	\$ 95,156	\$ 126,290	\$ 1,278,934	\$ 1,351,924	\$ 1,351,924	95%
	2023	\$ 76,280	\$ 103,649	\$ 157,273	\$ 102,052	\$ 90,452	\$ 81,445	\$ 84,932	\$ 98,003	\$ 122,795	\$ 96,130	\$ 112,124	\$ 113,364	\$ 1,238,499	\$ 1,293,350	\$ 1,293,350	96%

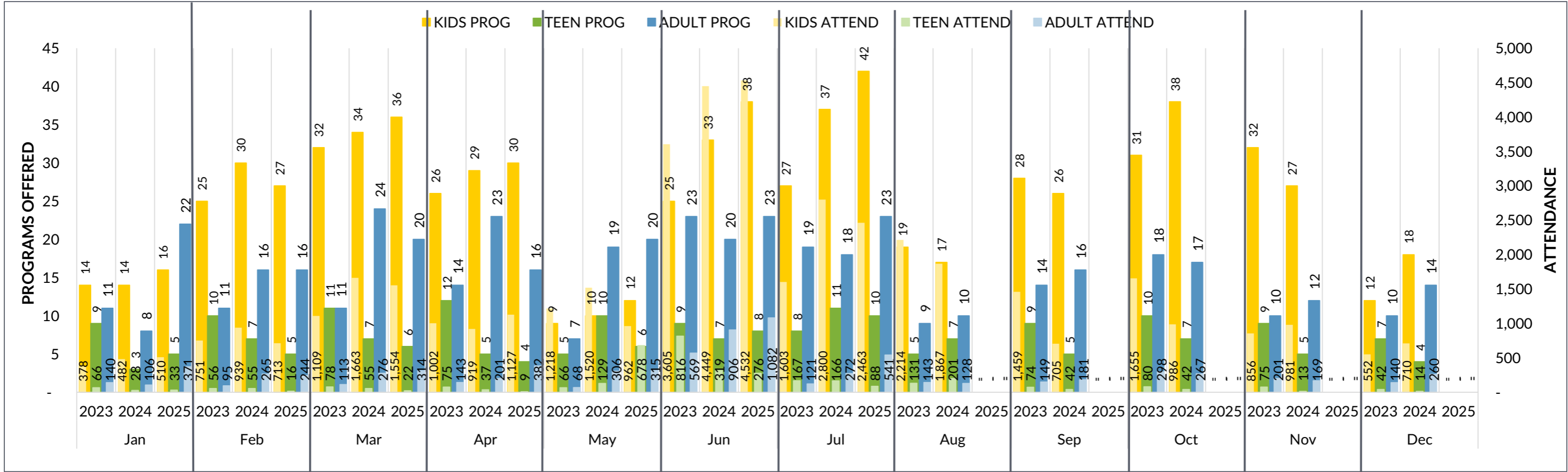
CIRCULATION



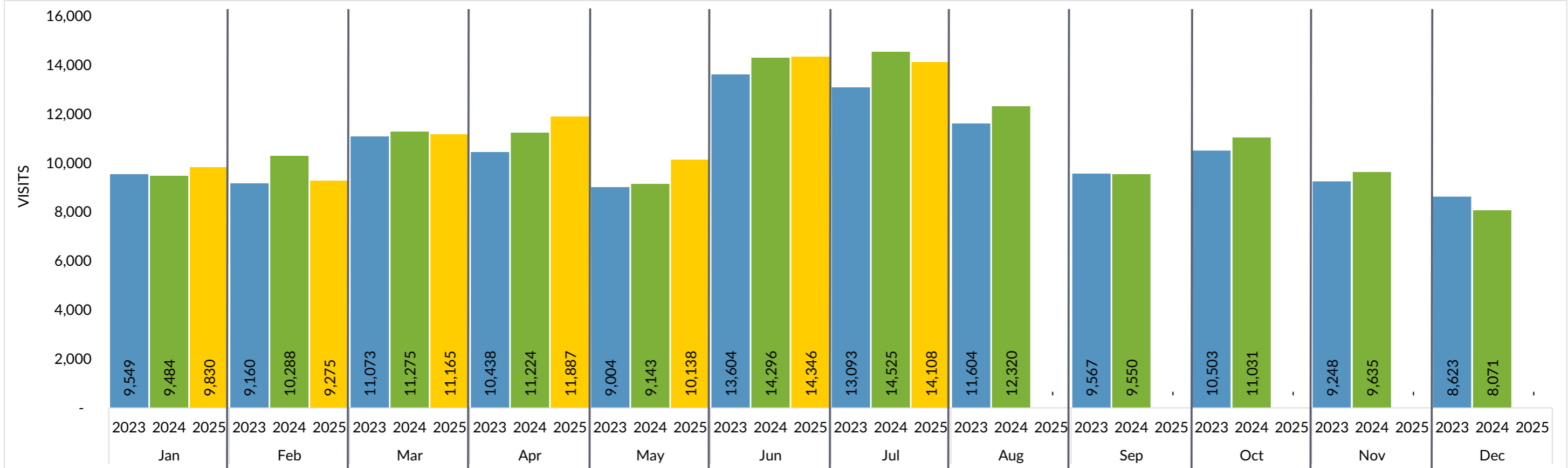
EMEDIA CIRCULATION



PROGRAMS



VISITS



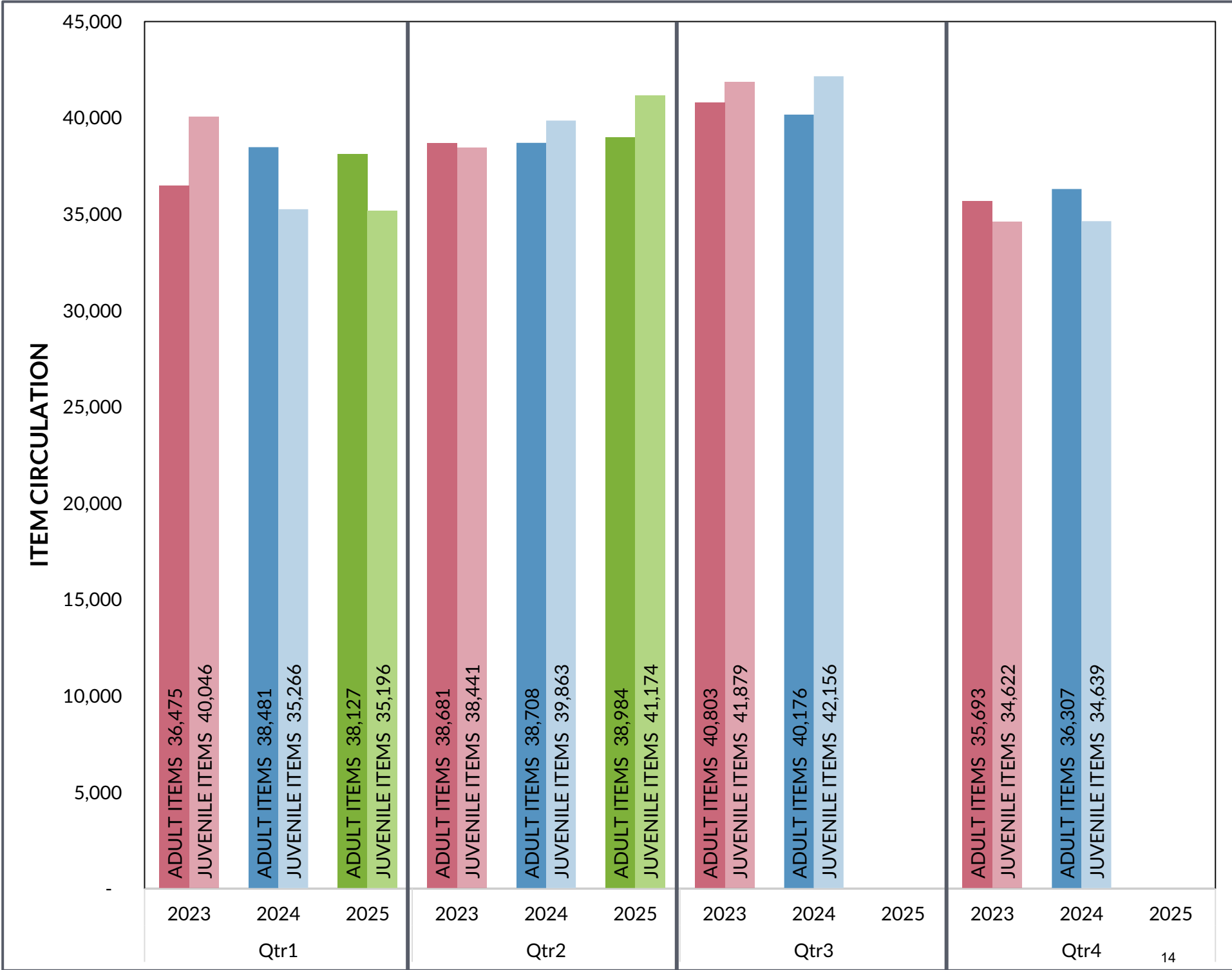
REPORT DATE July 2025

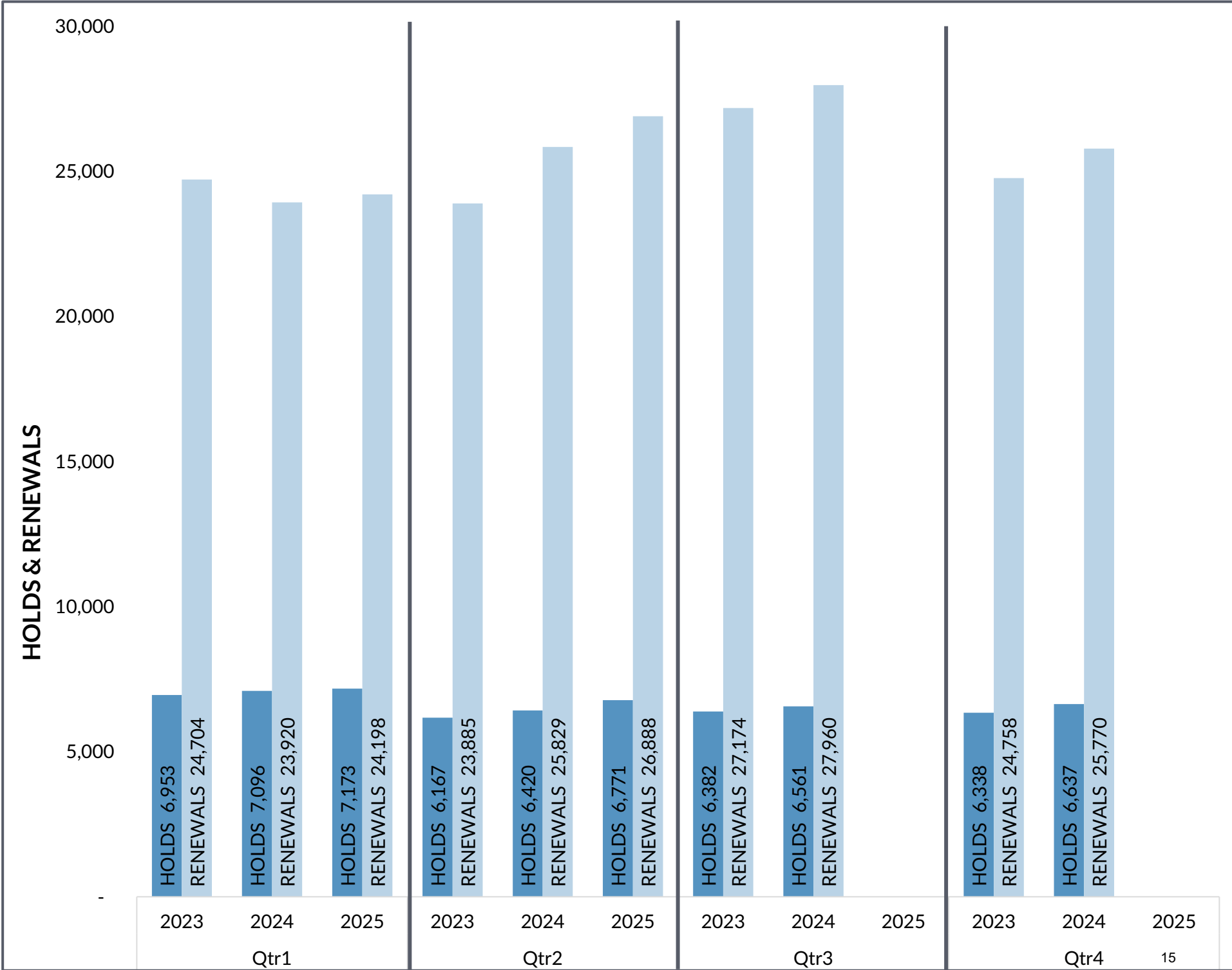
ACCOUNT	ACCOUNT NAME	EXPENSE
AP		\$13,834.79
210	PROF SERV NON-IT	
	KLEANLINE	\$570.00
	LEGAL	\$204.16
	PLOWING	\$327.08
	S & S WINDOW CLEANING LLC	\$110.00
211	PROF SERV IT	
	JOSEPH F DI MARIO JR	\$862.50
	TAYLOR COMPUTER SERVICES, INC	\$2,551.00
212	PROGRAMS	
	ABIGAIL NICOLA	\$150.00
	EMMA DISTERHAFT	\$382.00
224	GAS & HEAT	
	WE ENERGIES	\$115.66
225	TELEPHONE	
	AT&T	\$56.07
226	INTERNET	
	WI DEPT OF ADMINISTRATION	\$600.00
240	MAINT CONTRACT NON-IT	
	RHYME BUSINESS PRODUCTS LLC	\$830.43
	ST MICHAEL STRATEGIES	\$225.91
323	AUDIO VISUAL	
	MIDWEST TAPE, LLC	\$1,414.44
325	E-MEDIA	
	MIDWEST TAPE, LLC	\$1,723.16
330	TRAINING AND TRAVEL	
	JENNIFER FIDLER	\$116.20
332	CAR ALLOWANCE	
	PAYROLL	\$11.08
345	COMPUTER & TECH EQUIP	
	JOSEPH F DI MARIO JR	\$147.27
400	REPAIR BUILDINGS	
	ACE OF OCONOMOWOC	\$81.96
	LORLEBERGS TRUE VALUE	\$110.92
435	REPAIR EQUIP	
	FLEMING'S FIRE 1 INC	\$79.20
509	DATA PROCESSING	
	FINANCE DEPT	\$838.33
510	RISK MANAGEMENT	
	FINANCE DEPT	\$2,010.83
530	COPIER LEASE	
	RHYME BUSINESS PRODUCTS LLC	\$316.59
PCARD		\$11,286.75
210	PROF SERV NON-IT	
	FLEMING'S FIRE 1	\$103.00
212	PROGRAMS	
	AMAZON	\$254.63
	FUN SCIENCE INC.	\$100.00
	MICHAELS STORES	\$23.46
226	INTERNET	
	SPECTRUM	\$159.99
	USCELL RECURRING	\$268.66
321	BOOKS	
	AMAZON	\$407.93
	BAKER & TAYLOR	\$8,581.08
	BOOKS & COMPANY	\$147.97
325	E-MEDIA	
	CRUNCHYROLL	\$12.64
	DISNEY PLUS	\$23.20
	PEACOCK TV	\$8.39
	STARZ ENTER	\$8.43
340	OPERATING SUPPLIES	
	AMAZON	\$567.61
	SHOWCASES	\$619.76
Grand Total		\$25,121.54

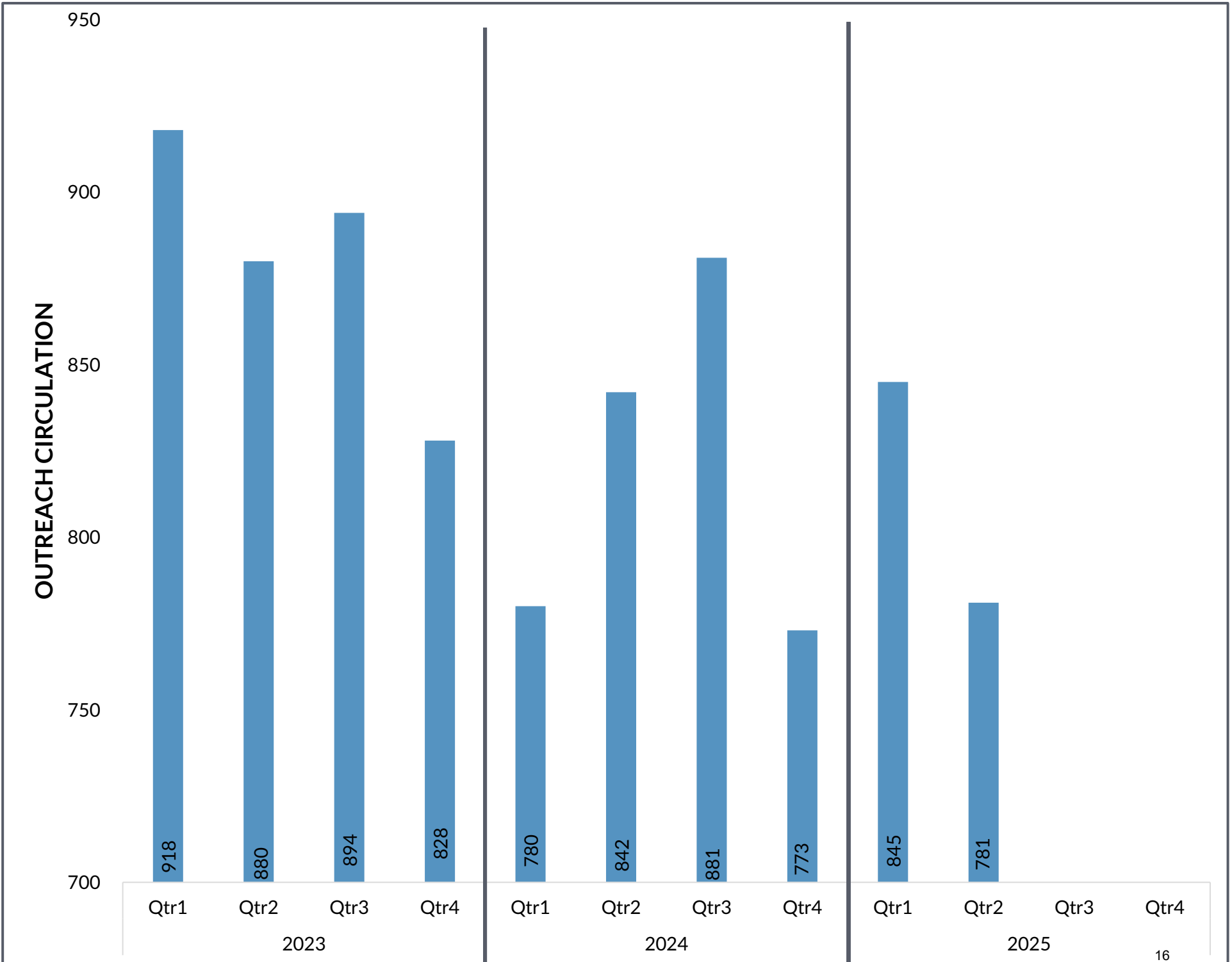
APPROVED BY:

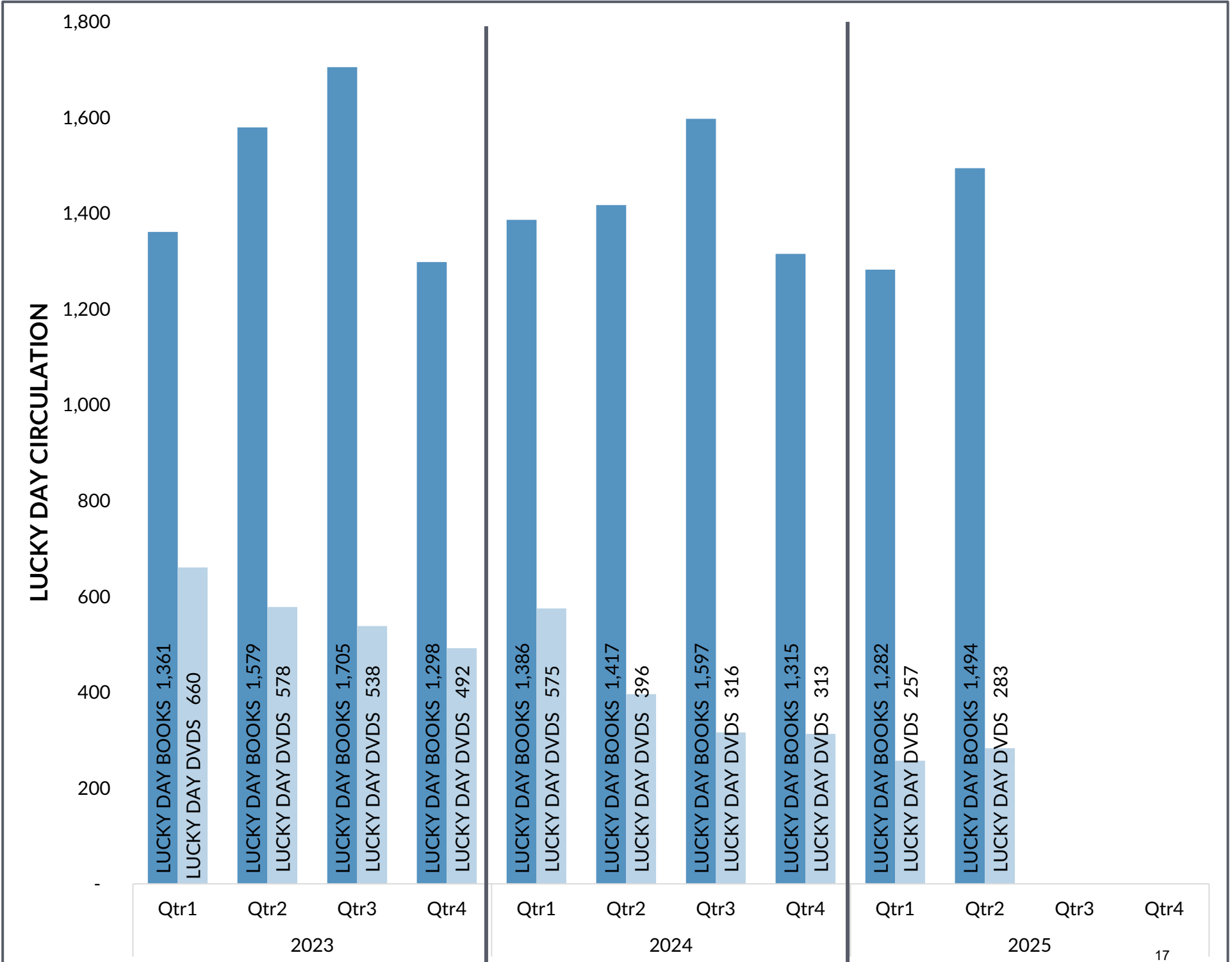
LIBRARY
DIRECTOR _____

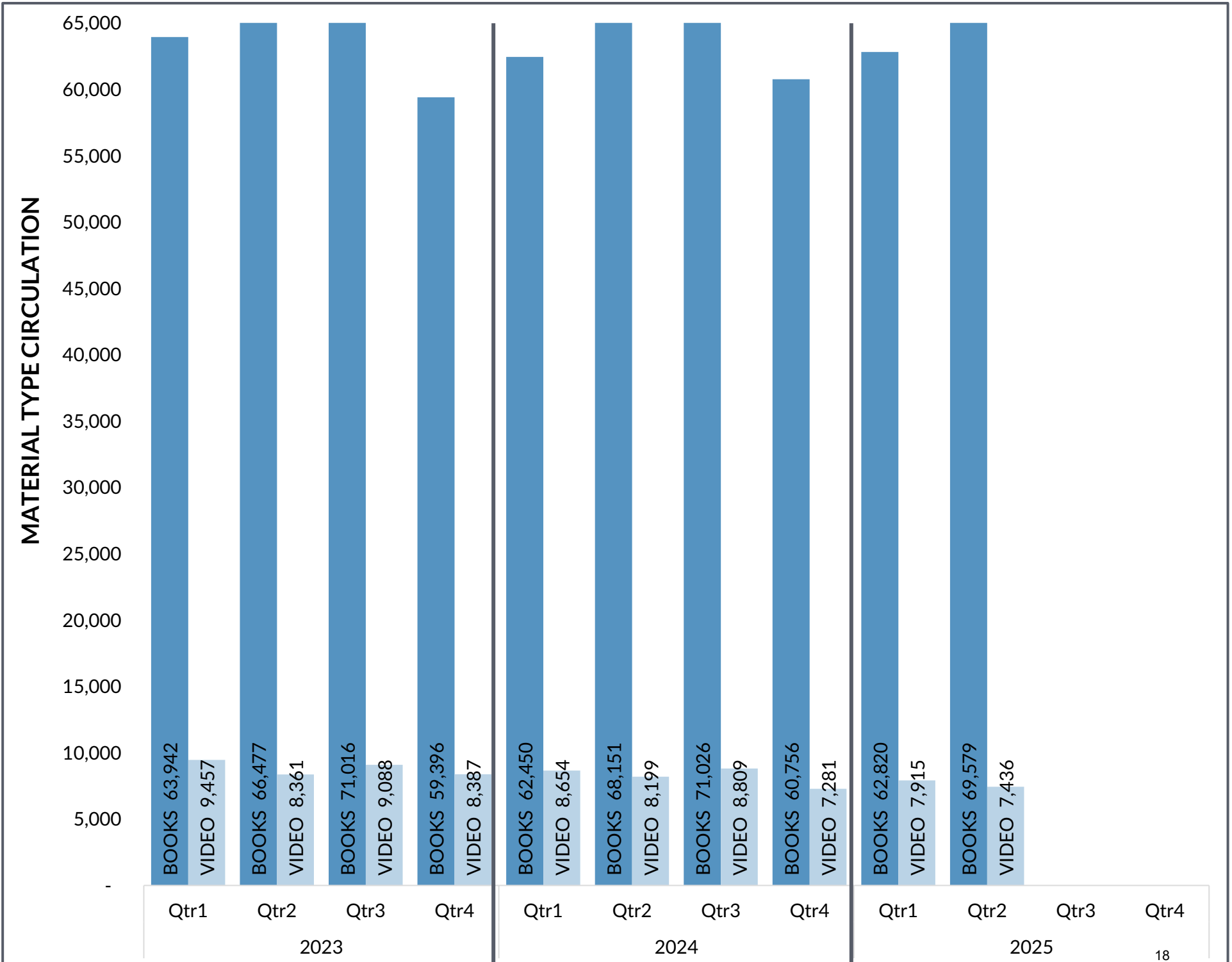
BOARD
MEMBERS _____





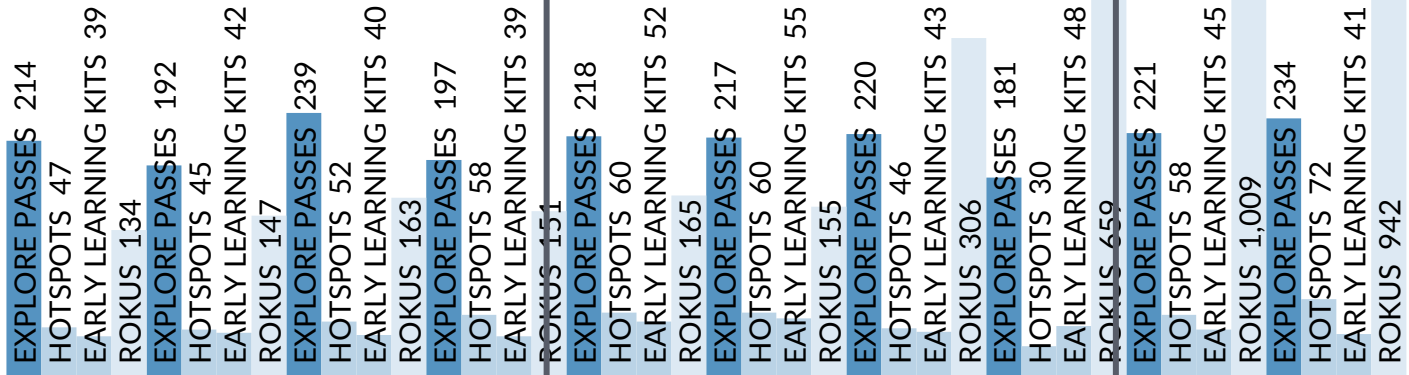






LIBRARY OF THINGS

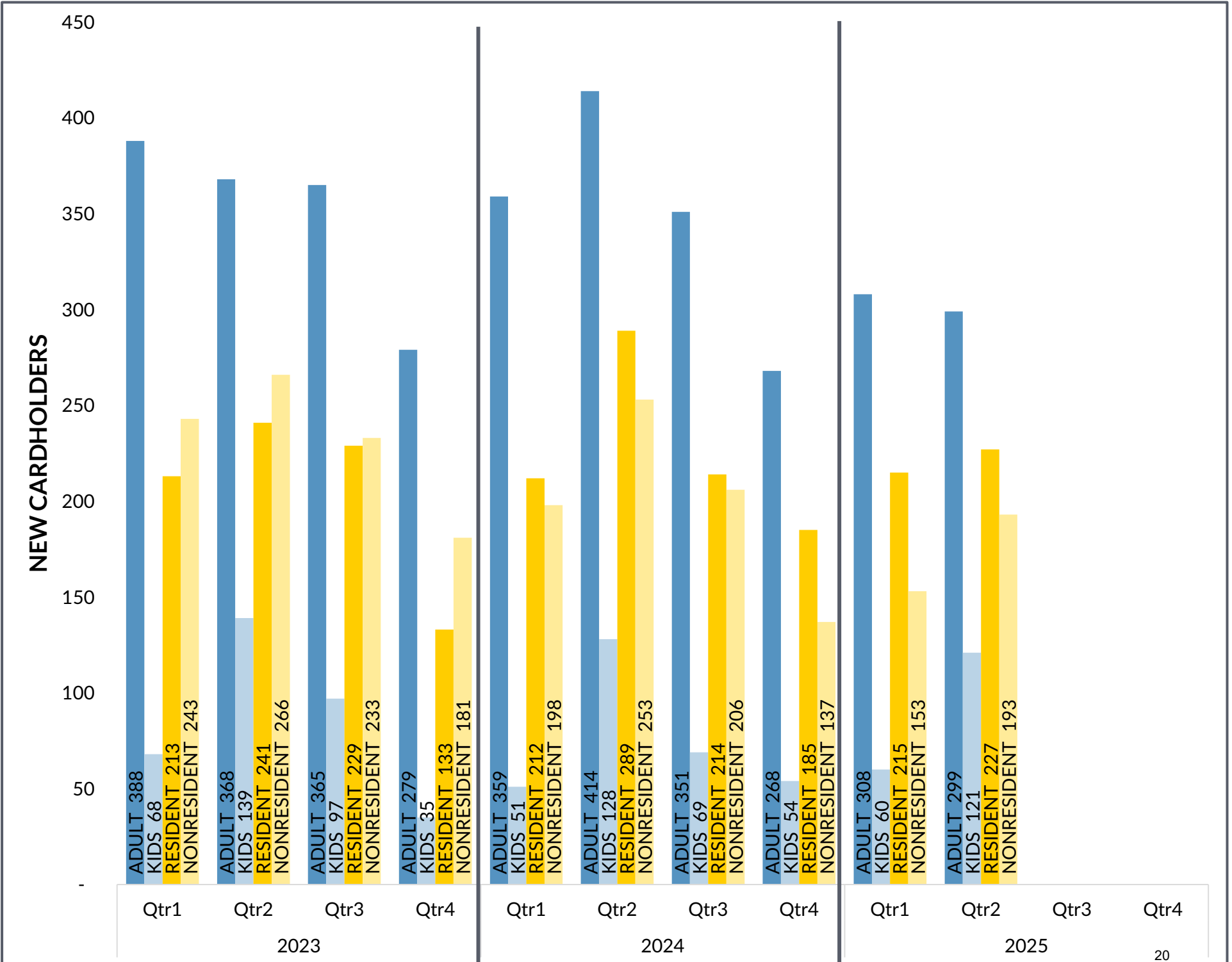
1,200
1,000
800
600
400
200
0



2023

2024

2025



TOTAL CARDHOLDERS

14,000

12,000

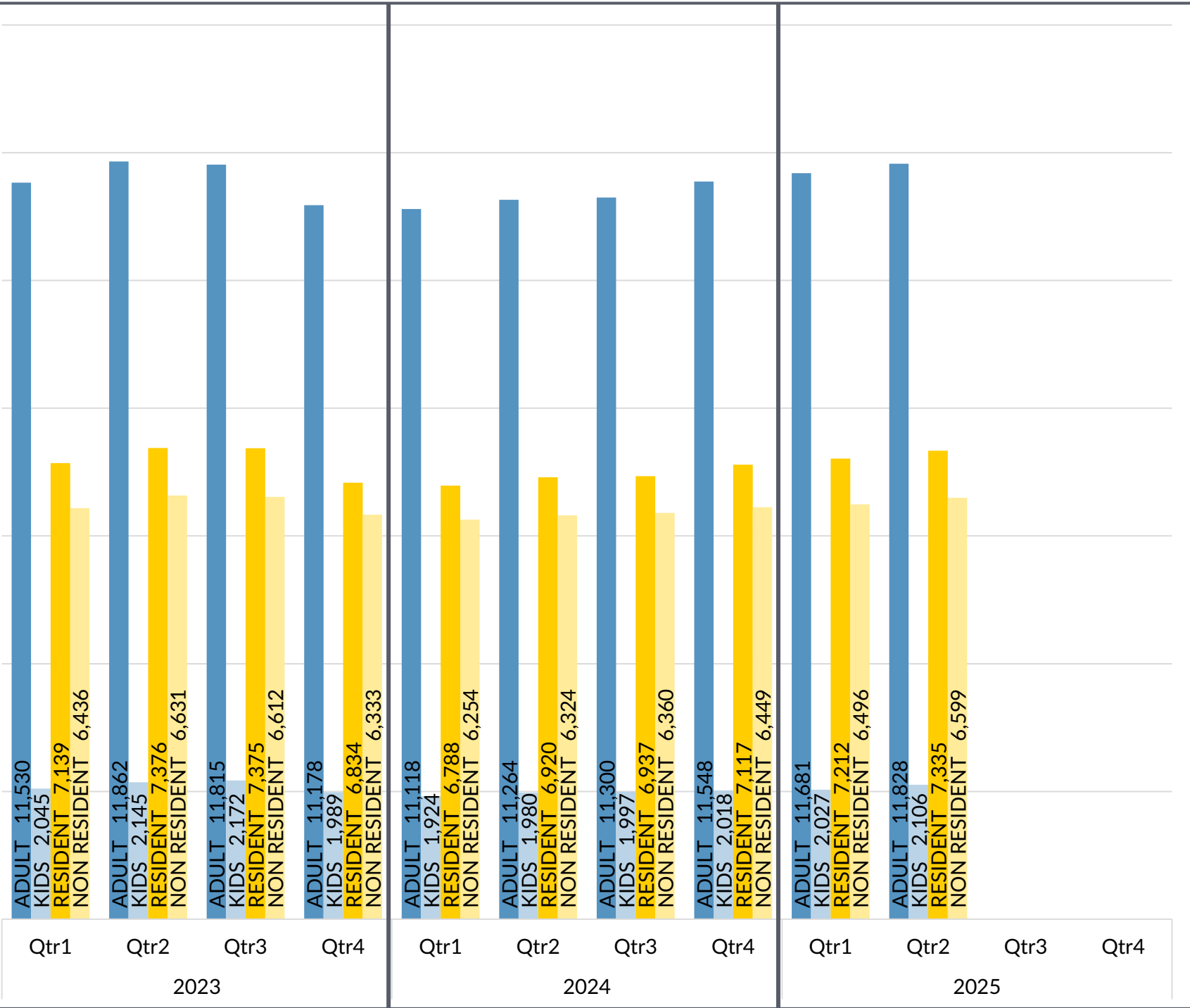
10,000

8,000

6,000

4,000

2,000



Bridges Library System Staff Reports

August 2025

Brittany Larson – Library System Director

2026 Bridges Library System Budget

I attended the Waukesha County Executive budget review on July 30th and presented the preliminary budget approved by the Bridges Library System Board in July. The final version of the budget will be brought to the Board for consideration at the September Bridges Board meeting.

Jefferson County Library Service Board

I attended the Jefferson County Library Service Board on July 29th to present the 2026 Jefferson County Library budget request. It was approved.

2026 Jefferson County Library Budget

The budget approved by the Jefferson County Library Service Board was submitted to the Jefferson County Finance Director. Dwight Foster Public Library Director Minetta Lippert and I will meet with Jefferson County Administrator and Jefferson County Finance Director on August 13th to discuss the budget request. The Finance Committee Budget Hearing is scheduled for September.

System and Resource Library Administrator Association of Wisconsin (SRLAAW) and other meetings

I attended the quarterly meeting of this group. Staff from the DPI's Bureau of Libraries spoke about updates related to federal IMLS funding. The Speak Up for Libraries postcard campaign was also discussed. I also attended the WPLC State Delivery Workgroup and the WPLC Technology Steering Committee.

Waukesha County Planning Committee

The Waukesha County Act 150 Committee held their first meeting on August 12th at the Waukesha Public Library. I am serving as an advisory member and have spent the last few weeks developing presentations, gathering statistics with Mellanie, and developing infographics with Emily to help best create a foundation to move this committee forward.

Continuing Education

In order to get to know more staff from Waukesha County and accrue continuing education opportunities towards my state certification, I attended a Waukesha County training titled "Emotional Intelligence and Difficult Conversations" and "Strengthening Your Facilitation Skills to Engage Adult Learners".

Hoopla

The member libraries of Bridges made the decision to end their respective contracts with Hoopla this month. I helped coordinate the logistics of this for the libraries.

Trustee Training Week August 18th-21st

Designed specifically for public library boards, friends, and trustees in Wisconsin, Trustee Training Week contains four days of individual virtual learning sessions that run noon-1pm. Online sign up can be found at <https://www.wistrusteetraining.com/>.

Mellanie Mercier – Automation Coordinator & Assistant Director

Overdrive Collection

We started the lucky day collection in July 2024 with 180 copies of materials in which we had 1,346 lucky day circulations (521 from the state collection and 825 from the advantage lucky day). We now have just over 600 copies of materials in the lucky day collection with 3008 circulations. In January we began receiving the average hold wait times, for Bridges in January it was 62 days, and at the state it was 73.4 days. The average wait time is currently 78.96 days at the state level, and in Bridges the average wait time is 58.7 days.

Kelly Nelson – Coordinator of Library Development

Repair Café Research & Interest Group

At the end of June, I had the opportunity to attend the Fox Cities Repair Café at the Neenah Public Library. A Repair Café is a place where community members can come to get items repaired by volunteers who want to share their knowledge for free. These cafes focus on repairing items to keep them out of the trash, but they're also about building community and people helping one another. I attended with the intention of learning how the café is run and determining if this is something that could be brought to the libraries in the Bridges Library System. I have reached out to our libraries and have seen much interest so I will be holding the first Repair Café Interest Group at the end of August. I'm excited to see where this goes.

Journey21 Visit

Angela Meyers and I visited Journey21, a local organization dedicated to providing safe, supportive, and enriching living and learning opportunities for adults with intellectual or developmental disabilities. We hope to partner with this organization to provide a day of professional development for librarians in this area. It was a beneficial meeting, and we look forward to working with them in the future.

Upcoming Events

- **SEWI Directors Retreat, August 22nd** – Registration is now open for this day long event for SEWI Library Directors.
- **Bridges Repair Café Interest Group, August 28th**
- **SEWI Book Repair Workshops, September 23rd** – Two identical workshops will be offered to help SEWI staff learn book damage prevention tools and simple repairs.

Professional Development

I attended Strengthening Your Facilitation Skills to Engage Adult Learners, an in-person training provided by Waukesha County.

Angela Meyers – Coordinator of Youth and Inclusive Services

Youth Services

In July, I visited various libraries to evaluate performances and workshops organized by Bridges. These included:

- Canvas painting sessions facilitated by Set Apart Art
- Magic shows conducted by James the Magician
- Nerf Games hosted by Bryen Wenzel with Milwaukee Area Nerf Outings (MANO)

The Summer Celebration/Summer Library Program Wrap-Up is slated for August 13, 2025, at noon at the Johnson Creek Public Library. All library staff engaged in youth and teen services are strongly encouraged to participate.

I also met with the new children's librarians over at Town Hall Library and Hartland Public Library.

Inclusive Services

In partnership with Waukesha County's Purchasing Department, the Bridges Library System initiated an informal RFP process to obtain bids for the redesign of the Library Memory Project's website. This site functions as the main access point for information and registration for memory cafes at 21 participating public libraries. In light of its 11-year-old architecture, the website will be revamped to meet modern web technologies as well as web accessibility regulations that will be enforced starting in 2026. Greenleaf Media submitted the lowest compliant and responsive bid. Work on the web site is set to begin this fall, pending agreement approval.

The Annual Fall Family Day for the Library Memory Project is coming up on Sunday, September 28 at Retzer Nature Center in Waukesha. [More information.](#)

Professional Development

The Financial Wellness Module & Eating Healthy Module have been completed as part of the Waukesha County Standards of Service Excellence (SOSE). I also tuned into a Niche Academy webinar titled *Meetings That Matter: Seven Steps to Running an Effective Meeting.*



Set Apart Art Canvas Painting at Powers Memorial Library in Palmyra (top left), James the Magician at Waukesha Public Library (top right), and Nerf Games at Brookfield Public Library (bottom center)

Beth Bechtel – Database Management Librarian

Library Visits and Meetings

In the last month I've had consultation visits with staff at three libraries. At Town Hall Library, catalogers and I completed their new use of item record collection codes. In Hartland we reviewed cataloging workflow and in Fort Atkinson we went over specific questions as the soon-retiring cataloger there plans for an incoming cataloger.

At the CAFÉ Catalogers virtual meetup this month we talked about cataloging board games, new subfields in MARC records, audience codes, and Sussex's new WhaZoodle devices. WhaZoodles are screen-free speakers loaded with audio geared toward children, including music, podcasts, games, and stories.

Elm Grove Public Library hosted our annual CAFÉ Serials group meetup. Eight of our member libraries use the Polaris serials module to track their periodical subscriptions. The group discussed an oddity with the list of expected magazine issues, how to handle special magazine issues such as "Holiday 2026," and reviewed how magazines display in Vega Discover.

Continuing Education

This month I attended the Cataloging Forum provided by the Innovative Users Group. This annual session is a great way to get information about cataloging solutions from other Polaris and Leap users. A hot topic this time was new cataloging functionality in Leap. I also attended the ALA webinar "Technical Services Training Top 10." While geared toward department managers, the session included tips useful for helping catalogers in Bridges libraries.

Emily Heller – Public Communications Coordinator

Update: "Speak Up for Libraries" Postcard Campaign

Bridges sent **1,458 Postcards** in Wave #2 to MCFLS for mailing on August 15 to reach legislators after their August recess. This brings Bridges to a **total of 4,357 postcards** sent to legislators for the campaign. I will share the state total once it is available.

Marketing Toolkits

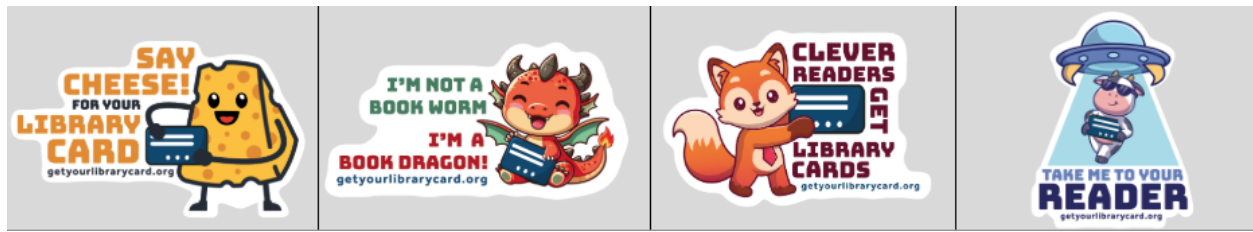
I have shared out a variety of toolkits for library staff to use:

- Hoopla service update
- New Vega catalog
- Systemwide Events Calendar
- OverDrive's Check Out Your Library (COYL)



Statewide Marketing Cohort Stickers Collaboration

The orders have been placed for promotional stickers to support Library Card Sign-up Month in September! These will also be available in our outreach bins. There are 4 fun designs this year!



Update: Journey of Dragons: A Library Challenge

We have received 336 prize entry forms in July for a total of 609 entries so far!

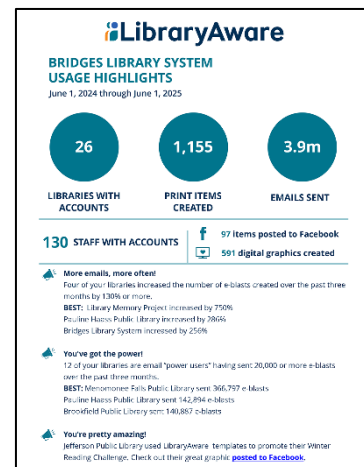
We are about 250 entries lower than the 2024 Library Treasure Adventure event at the same time.

LibraryAware Usage Report: June 1, 2024 - June 1, 2025

Our LibraryAware Engagement Consultant shared our usage highlights report. It showed some of the work going on across the system:

- 3.9 million emails sent
- 1,155 print items created
- 12 accounts are e-blast “power users” with 20,000 or more e-blasts over the past three months.

[Check out the report](#)



Community Outreach

- **Sat., Sept. 20th - Apple Harvest Festival**
Visit the Bridges outreach table at Retzer Nature Center’s annual event. We will be promoting library card perks in “The Pines” activity area with interactive games and a photobooth. Waukesha Public Library will also be there to kick-off [Waukesha Reads](#) with their book giveaway.
[Event details](#)
- **Sat., Sept. 20th – Fri., Oct. 31st - Story Hike at Retzer Nature Center**
I am preparing the pages and promos for our partnership! Read *Fungi Grow* by Maria Gianferrari, with illustrations by Diana Sudyka, out on the Orange trail all fall!
[Event details](#)

In the News:

- Wisconsin libraries may have to drastically reduce services under new federal funding cuts: [Milwaukee Journal Sentinel Article](#)
- Libraries wage postcard campaign, attempt to save federal funding: [Fox 6 News Story](#)
- Libraries invite patrons to voice opinions on federal funding: [Freeman Article](#)
- Free cookie decorating class offered for teens: [Daily Union Article](#)
- Wisconsin Public Libraries Postcard Campaign: [WisPolitics Post](#)

- Federal funding for libraries threatened: [Watertown Daily Times Article](#)
- Wisconsin public libraries ask for public's help to speak up about federal funding: [WTMJ620 News](#)
- Postcard news from across the state:
 - o Speak up for Wisconsin public libraries with a postcard to your federal elected officials: [MSN Article](#)
 - o Local, State Library Directors Consider Future without Federal Funding: [Door County Pulse Article](#)
 - o Speak up for Wisconsin public libraries with a postcard to your federal elected officials: [WMTV 15 News Article](#)
 - o Public libraries in Wisconsin trying to save federal funding: [WSAW 7 News Article](#)
 - o Wisconsin libraries sending postcards to Congress: [WBAY 2 News Article](#)

[News Archives](#)

Newsletter Data: Industry standard/goal is 44% Open Rate

- Marketing Magic:
 - o August 8: 63.86% Open Rate
 - o July 18: 67.47% Open Rate
 - o July 3: 68.97% Open Rate
- Monthly Bridges:
 - o July 10: 49.82% Open Rate
 - o June 6: 52.19% Open Rate
- Monthly Legislators - July 24:
 - o Legislators: 22.22% Open Rate
 - o Staff: 39.53% Open Rate

DIRECTOR'S REPORT

AUGUST 2025

BUDGET/FINANCE

We will be purchasing our new combined desk within the next month and installing it early 2026.

COLLECTION DEVELOPMENT/REFERENCE

Our Hoopla contract ends October 15. All Bridges libraries are submitting their 60 days on August 12. On Thursday, August 14 all member libraries and Bridges will post communications to the public.

COMMUNICATIONS

Trustee Training Week begins Monday, August 18, wistrusteetraining.com.

Loki had surgery on his eye Tuesday, July 22, paid for by the Friends. He is retiring in September and will have a program retirement party on September 13. We have a family that donated a new bearded dragon to the library.



CONTINUED SYSTEM INVOLVEMENT/AUTOMATION

Bridges has a new director, Brittany Larson. She was the director of Muskego Public Library since 2017. Larson began her library career at Carroll University's library in 2003. She earned her Master of Library and Information Science degree from the University of Wisconsin-Milwaukee in 2009 and performed several roles at the Carroll University library before being appointed interim library director in 2015. Larson accepted the director position at Muskego Public Library in 2017, and because the Muskego Public Library is in the Bridges Library System, she has worked with Bridges Library System staff extensively over the years while in the role.

DIRECTOR'S REPORT

AUGUST 2025

FRIENDS OF OPL

Friends of the Library Board meeting was Monday, August 11 at 6 pm.

PERSONNEL/CONTINUING EDUCATION

We recently hired Manda Ludwig as a part-time circulation clerk. She is doing a great job.

Kelsey Butterfield has accepted a position as library director of Muskego. Her last day was August 15. We will miss her greatly.

Natalie Hilmer, one of our part-time staff, has accepted the Reference Librarian position. She has her Master of Library Science degree and has many years of library experience. We are thrilled to have her full-time.

PLANNING

Feasibility Study Update: Jen Puccini has met with Jody from The Sweeney Group to discuss the process of the Feasibility Study.

A small group of city employees met on Friday to discuss Unstaffed Branch planning. The next step is to meet with the developer to discuss a possible location.

OPERATIONS

On Tuesday, August 12 there was a local power outage and many people came to the library to use our Wi-Fi and study rooms. There were people working from home and students doing online school. They were thrilled that we were able to help them get through their day.

PROGRAMMING

- Summer Reading went great!!! We had 2118 people signed up this summer which is the highest number we have ever had for SRP sign up. Out of the 2118 at least 500 of these sign ups were adult. We love seeing all ages participating in our summer reading challenge. We are looking into doing a year-round challenge.

Snake Discovery was a huge hit. We had 252 people attend.





Oconomowoc Public Library
FEASIBILITY STUDY
BRAINSTORMING SESSION
Monday August 18, 2025 6:00 – 7:00

AGENDA

- I. Overview
 - Thank you for including The Sweeney Group in this project
 - Introductions, as needed
 - Discuss the need for a small Study Committee; discuss coordination with the Advisory Task Force

- II. Objectives
 - Confirm objectives for the study and today's meeting:
 - gather information to present to the Library Board and the City for planning
 - test the public/private partnership concept and language
 - test the amount that can be raised privately and the timing for a campaign
 - test the community's reaction to City contribution to the project
 - identify potential donors and volunteers
 - test the case statement concepts and language
 - present the concept of a campaign in a strategic way
 - Brief review the Feasibility Study Protocol
 - Discuss publicity during the study – coordination between Library and City; discuss planned September newspaper article

- III. Discuss current design plans and costs to be presented– need for a meeting with FEH; materials on \$4.5 million - \$5 million renovation needed for study – additional narrative, hand sketch drawing, floor plan, etc.

- IV. Determination of study participants
 - Confirm Individuals for personal interviews (minimum of 25-30); if additional participants are suggested by these interviewees they will be added at no charge
 - Confirm Individuals to receive questionnaire by mail and electronic (Survey Monkey) survey (100 or more); includes all members of the City Council and Library Board; Library Friends

Oconomowoc constituencies

- Community leaders
- Long time families from Oconomowoc and area served by the library
- Current and past donors to the Library
- Past and current donors to other local organizations
- Local and regional banks; financial planners, etc.
- Representatives of companies and small businesses – local and regional
- Agricultural community – or those who sold farmland
- Those who have moved from Oconomowoc and who still have ties
- Potential in-kind donors

- ❑ Potential additional leadership volunteers including those who could serve on the Campaign Planning Committee, Honorary Committee, or potentially the 100 Extraordinary Women Committee
- ❑ City and other local officials – all will receive surveys; discuss any for interview without triggering open meetings
- ❑ Library Board of Trustees – all will receive surveys; discuss any for interview
- ❑ Friends leadership
- ❑ Service Club members
- ❑ Community groups for surveys
- ❑ Library users of all ages for surveys
- ❑ Others

V. Review material

- Initial case statement
- Letter requesting participation
- Questionnaire

VI. Action items to be confirmed after the meeting

- Letterhead (electronically) and envelopes
- Signatures
- Location for interviews
- Addresses, telephone numbers and emails for all names identified
- Background information on all interviewees
- Scheduling, including calls by Board members to encourage participation, if needed
- Confirm overall study timeline and any important milestone dates
 - July/Aug** – Writing, editing, planning, developing lists – *drafts completed*
 - August 18** – Brainstorming meeting with library Board, Staff and selected volunteers
 - August /September/October (if needed)** – interviews and surveys
 - September** – newspaper article planned – discuss content including study and 100EW
 - October/ November** – present Study Final Report
 - November/December** (if study warranted) – campaign planning, volunteer recruitment, visionary gift cultivation and solicitation, potentially launch 100 Extraordinary Women



Oconomowoc Public Library FEASIBILITY STUDY PROTOCOL

BEFORE BRAINSTORMING SESSION

- Prepare draft initial case statement
- Get information from FEH re: renovation design and costs, drawings or renderings, conceptual floor plan
- Gather lists of names to review at brainstorming session - Oconomowoc community leaders, business leaders, past donors, potential donors and volunteers, etc.
- Confirm agenda for brainstorming session
- Prepare draft questionnaire for personal interviews and surveys, for review at brainstorming session
- Prepare letter requesting participation in interviews and surveys, for review at brainstorming session

AT BRAINSTORMING SESSION

- Confirm case statement elements to test
- Confirm all study materials
- Confirm goal / goal range to test
- Determine people to include in the study - interviewees, others to receive surveys

POST BRAINSTORMING SESSION

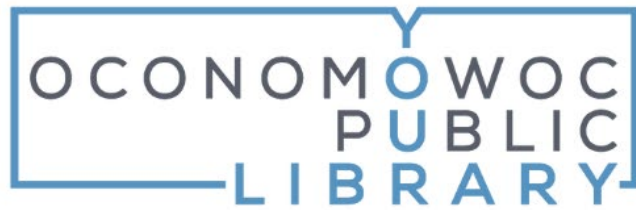
- Assign point person(s) to work with Sweeney Group to coordinate study administration
- Revise case statement based on discussion during brainstorming
- Revise letters inviting people to participate in the study
- Confirm who will sign letters
- Revise questionnaires to be used for different levels of the study
- Develop spread sheets of names to participate in all levels of the study
- Confirm dates for interviews
- Confirm location(s) for interviews
- Mail letters to potential interviewees with initial case statement information
- Mail letters to survey recipients with survey, return envelope addressed to Sweeney Group, and deadline to return survey; same with survey monkey
- Calls to schedule interviews
- Determine those who are most important and ask board members and other volunteers to call to encourage participation
- Get information on each of the people to interview to The Sweeney Group, including role in community, interests, past donations, etc.

INTERVIEW PHASE

- Conduct personal interviews
- Receive and analyze up to 100 surveys

POST INTERVIEW PHASE

- Present report
- Acceptance of report findings by Board and staff
- Determine campaign goal, action steps and timeline
- Launch campaign with Campaign Planning Committee and possibly *100 Extraordinary Women*



*“An Investment in
Oconomowoc’s Future”*

INITIAL WORKING DRAFT

The Case for Your Support

August - September 2025





It is the **sense of community** that makes Oconomowoc such a special place. It is why we are proud of our hometown and why we work together to make it better. Our community is a place where people want to raise their children and start a business. That is our **tradition** – and now we want to build on that tradition by improving our library. Oconomowoc is a growing community and we want the renovated library to reflect this while also remaining the welcome and vital place it is today.



We also want to continue the **Library's legacy**. The Oconomowoc Library is one of the oldest in the state, progressing from a private organization in 1870 to a public library in 1893. In 1918 the City of Oconomowoc took over operations from the Oconomowoc Public Library Association. From 1900 to 1987 the library was located in a three-story complex built in the 1850's and 1860's. In 1987 the library moved to its current location; it is currently 24,000 square feet on one level. Over the years, there have been various upgrades to the building, but they have not kept up with current library trends, nor with the growth in our community. Oconomowoc currently has a population of approximately 20,000 people and a library service population of almost 30,000. This is projected to be almost 40,000 by 2044.

Current library



The Proposed Plans and Costs for a Renovated Library

In 2024 the Library Board of Trustees and Staff decided to look to the future and determine the best way to deliver library services to the community. The hired FEH Design, award-winning library architects, to develop a space needs analysis. The community was very involved in the entire process including forming an Advisory Task Force and holding community Spark Sessions. FEH presented 18 conceptual designs that included renovations and expanding the current building.

Planning for a new library in Oconomowoc includes many exciting concepts. It is being designed to meet the community's needs for many years to come, based on the latest census data, local Library Standards, post pandemic considerations, environmental sustainability features, community resiliency, technological needs, and community partnerships. The renovation and expansion will address many issues in the Library. Emphasis focused on:

- a welcoming, visible entrance,
- a meeting room that could be used outside regular library hours,
- children's programming room and outdoor program areas,
- barrier-free access,
- access to new technology and high-speed internet.

The space needs study determined that 54,000 square feet would be an optimal size for the library, based on underlying service goals and trends in public library service. The recommendation was for a \$26.3 million expansion, beginning with a \$4.5 million renovation. The Library Board is interested in moving forward with this plan to renovate the library, as Phase 1 of the entire visionary scope. The City will consider provide a portion of this funding based on how much can be raised privately from the community.

Testimonial from community leader



The Value of Libraries to a Community

People think that with the growth of the internet, libraries are becoming a thing of the past. Nothing could be further from the reality of libraries today. All across America, libraries are in transition – always finding new ways to add value to the community; this is particularly true in Wisconsin. Libraries are among the most equal access institutions; they play an integral role in fighting disinformation and developing life-long readers. They are multi-tasking organizations housed in multi-purpose buildings. Once a quiet space to check out a book to take home and read, libraries are no longer one-dimensional. Libraries of the 21st century are changing to meet new demands and provide additional services to their communities. They are versatile, dynamic organizations meeting the demands of a changing society. Libraries embrace progress, reaching beyond known solutions and formats while bringing people and information together. A community's library levels the playing field to assure that all may reap the benefits of knowledge and education.



Please join us – help develop a place that will be used and loved by everyone in Oconomowoc and the communities serving the library.



Oconomowoc Public Library
Feasibility Study
Confidential Questionnaire for Interviews
When all language is approved, this will be shortened for survey
DRAFT August 2025

Interviewee:

Information for review prior to interview:

Any involvement with/donation to the Library:

Why chosen for the study:

Date of interview:

Time:

Location:

Questions:

- (1.) Are you or your family regular patrons of the library? Do you know others who are? What do you like best about the current library? What do you think is most needed?

- (2.) Everyone wants to ensure that Oconomowoc has first quality community assets. How would you rank the library as a factor that contributes to the great quality of life in the Oconomowoc area? From 1 to 5, with 5 being the highest.

- (3.) What do you know about the plans for the **renovated and expanded** library? Please detail your thoughts on the library. What do you think is the strongest return on investment offered by the renovated and expanded building?

- (4.) What areas do you think are most important in the library?

- (5.) Can a renovated library facility serve as an economic development tool to make Oconomowoc more of a destination for young families to move and businesses to develop?
- (6.) What did you think of the initial case statement you received with the letter asking you to participate in this study? How can we make this case more compelling? What are the most powerful reasons to support this project ?
- (7.) Phase I will cover renovation of the existing library. It is expected to cost \$4,500,000 - \$5,000,000. A fully renovated and expanded library is estimated to cost \$26.3 million.
- What is your reaction to these costs?
 - How do you feel about a public/private partnership with the City providing support as a challenge to the people of Oconomowoc to donate private funds?
 - Do you think we can raise in the range of \$2,500,000 from the community?
 - The campaign does not include an endowment component. Please give us your reaction.
 - What are the most important factors that affect your response?
- (8.) The campaign will develop “naming rights” for large contributions. What are your suggestions regarding naming areas for large donations? Is there any area that you think will be of special importance ?
- (9.) How do we best publicize the library project and the campaign so that the entire community feels that they are a part of it? Where do you get most of your information on what is happening in Oconomowoc and the surrounding area?
- (10.) What do you think would be the best theme for the campaign?
- Do you like “Invest in Oconomowoc’s Future”?
- (11.) In other communities, a specific segment of the campaign has been *100 Extraordinary Women* - collective giving among women. 100 women are each asked to pledge \$1,000 over 5 years (approximately \$200 per year; \$18 per month) to name a specific area of the library. This has been successful (Raising \$100,000 or more) every time it was used. How do you feel about this strategy being used for this campaign? Should it be used to launch the campaign?

(12.) From your knowledge, which individuals or groups (businesses, foundations, etc.) could contribute a visionary gift or pledge to this project? Can you indicate an amount or a range? Visionary gifts are typically \$100,000 - \$250,000 or more pledged over 5 years.

(13.) Which individuals or groups could contribute at a smaller, though still very important, level, such as \$10,000 - \$25,000 pledges?

(14.) How should we best seek small gifts from throughout the community?

- asking people to sponsor a table, chair, shelving, etc.
- pavers or bricks
- wall tiles, possibly that form a mural of the area
- social media campaign

(15.) What types of similar fund raising have been successful in Oconomowoc or the neighboring communities served by the Library?

(16.) Are you aware of any other recently completed, on-going, or planned fund raising campaigns in the area?

(17.) Do you know of any individuals or families who have moved from the area but still have ties to the community?

(18.) In addition to the Library Board, who do we need on the campaign committee to make this successful?

(19.) In your opinion, who would be the *best* person or persons to chair the campaign?

(20.) Who would be the best people to serve in an honorary capacity – endorsing the campaign through the use of their name?

(21.) *This is in no way a request for a gift*, but where does the library rank among your personal interests? Would you consider volunteering for the campaign in any way?

(22.) What other factors might affect the success of the campaign?

(23.) Who else should be interviewed as part of this study?

Additional comments:

Thank you so much for your participation.



200 W. South St.
Oconomowoc, WI 53066

(262) 569-2193
contactus@oconomowoclibrary.org

August XX 2025

Name/Address

Dear :

There is something special about every city – it’s a **sense of community**. We live in a great community – a wonderful place to live and work – and the library is one of the assets that make Oconomowoc great. But the library is in need of renovations. As detailed in the enclosed Initial Case for Support, **cost-effective plans are being developed - XXX**. **But we won’t move forward until we have the community’s input.**

People think that with the growth in the internet, libraries are becoming a thing of the past. Nothing could be further from the reality of libraries today. All across America, libraries are in transition – always finding new ways to add value to the community. Libraries are among the most democratic, equal access institutions; they play an integral role in teaching information literacy. They are multi-tasking organizations housed in multi-purpose buildings. Once a quiet space to check out a book to take home and read, libraries are no longer one-dimensional. Libraries of the 21st century are changing to meet new demands and provide additional services to their communities.

We are proud of our current library with its many programs and diverse collection offerings but we know that it is not the best it can be, that it does not live up to the standards of 21st Century libraries. We need expanded early learning areas including play centers, engaging teen and pre-teen spaces, upgraded technology, large and small meeting spaces, study and collaboration spaces, expanded areas of informal seating, and a welcoming outdoor seating area.

We want to know what you think. On behalf of the City Council, City Administration and the Library Board of Trustees and Staff, we are writing to ask that you spend just a small amount of time participating in a study to give us your thoughts on these plans.

We also want to determine the extent of the community’s support. We want to determine the potential for raising the private funds that will be part of the public/private partnership between the Library and the City of Oconomowoc. Communities across Wisconsin are raising this much, or more, to provide 21st century libraries for their residents.

To assist us in analyzing these plans, we have engaged the services of The Sweeney Group, a fund-raising consulting firm with extensive expertise in assisting more than 24 libraries in Wisconsin with successful campaigns. They will conduct a campaign planning study to determine the amount of funding that can be privately raised and the best strategies for a potential campaign. A key component of the study is to gather information from community residents.

Your opinion, along with others, will give us valuable input. Your comments will be held ***strictly confidential*** and used only in the aggregate of the report.

We would very much appreciate it if you would take 30-60 minutes for an interview – in-person, by zoom, or by telephone. We plan to hold the majority of the interviews in the library. If this is not convenient, a representative of the Sweeney Group will come to a place that is convenient for you. Someone will call you to schedule the interview.

This interview is only for your opinions; it will not be a request for funds. On behalf of the Oconomowoc Public Library, thank you.

Sincerely,

Kerry Hansen
President,
Library Board of Trustees

Mark Frye
City Administrator

Jen Puccini
Library Director

Enclosure: Initial Case for Support

		2023				2024			2025		2026	
REVENUE												
COUNTY FUNDING	ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Actual	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
WAUKESHA	3720	\$ 324,281.00	\$ 324,281.00	\$ 324,298.20	Actual	\$ 341,744.00	\$ 342,557.66	Tentative number from Bridges	\$ 369,417.00		\$ 403,799.00	
DODGE	3721	\$ 35,924.54	\$ 35,924.54	\$ 35,925.00	Actual	\$ 30,195.59	\$ 30,195.59		\$ 29,113.98		\$ 27,443.35	
JEFFERSON	3721	\$ 105,065.00	\$ 105,065.00	\$ 105,065.00	Actual	\$ 99,013.00	\$ 99,013.00		\$ 87,631.00		\$ 99,097.00	
WASHINGTON	3721	\$ 212.55	\$ 212.55	\$ 212.55	Actual	\$ 266.59	\$ 266.59		\$ 882.33		\$ 560.23	
		\$ 465,483.09	\$ 465,483.09	\$ 465,500.75		\$ 471,219.18	\$ 472,032.84		\$ 487,044.31		\$ 530,899.58	
PUBLIC CHARGES	ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Estimate	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
FINES & FEES	6114	\$ 15,000.00	\$ 15,000.00	\$ 15,910.07	Used 2022 trends	\$ 14,500.00	\$ 15,111.43		\$ 15,000.00		\$ 15,000.00	
COPYING	6116	\$ 7,800.00	\$ 7,800.00	\$ 8,592.31	based on 2022 usage	\$ 7,000.00	\$ 8,377.24		\$ 7,000.00		\$ 8,000.00	
ROOM RENTAL	6741	\$ 600.00	\$ 600.00	\$ 630.00	\$50/mo x 12	\$ 600.00	\$ 910.19		\$ 600.00		\$ 600.00	
		\$ 23,400.00	\$ 23,400.00	\$ 25,132.38		\$ 22,100.00	\$ 24,398.86		\$ 22,600.00		\$ 23,600.00	
MISC REVENUE	ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Estimate	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
SALE OF PROPERTY	8310	\$ -	\$ -	\$ 512.75		\$ -			\$ -		\$ -	
PCARD REBATE	8430	\$ 3,500.00	\$ 3,500.00	\$ 3,229.03	Based on history	\$ 3,500.00	\$ 3,084.66		\$ 3,500.00		\$ 3,500.00	
		\$ 3,500.00	\$ 3,500.00	\$ 3,741.78		\$ 3,500.00	\$ 3,084.66		\$ 3,500.00		\$ 3,500.00	
												Place holder
DONATIONS	ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Estimate	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
GENERAL	8501	\$ -	\$ -	\$ -		\$ -			\$ -		\$ -	
REVENUE Total		\$ 492,383.09	\$ 492,383.09	\$ 494,374.91		\$ 496,819.18	\$ 499,516.36		\$ 513,144.31		\$ 557,999.58	
EXPENSES												
WAGES & BENEFITS	ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Estimate	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
FT SALARIES	111	\$ 484,627.87	\$ 484,627.87	\$ 471,034.20		\$ 503,865.71	\$ 499,744.52		\$ 520,304.93		\$ 535,914.08	Estimate
PT W/BEN	113	\$ 41,629.57	\$ 41,629.57	\$ 36,139.20		\$ 43,498.62	\$ 45,874.26		\$ 73,292.33		\$ 75,491.10	Estimate
PT W/OUT BEN	125	\$ 168,131.39	\$ 168,131.39	\$ 160,867.00		\$ 175,674.54	\$ 145,085.06		\$ 135,599.27		\$ 139,667.25	Estimate
SUNDAY HOURS	126	\$ 7,765.10	\$ 7,765.10	\$ 7,526.52		\$ 8,075.69	\$ 8,098.11		\$ 8,317.98		\$ 8,567.52	Estimate
LONGEVITY	133	\$ 72.00	\$ 72.00	\$ 72.00		\$ 72.00	\$ 72.00		\$ 72.00		\$ 74.16	Estimate
FICA	151	\$ 53,620.88	\$ 53,620.88	\$ 50,012.39		\$ 55,946.80	\$ 51,318.20		\$ 56,352.95		\$ 58,043.54	Estimate
WRS RETIREMENT	152	\$ 35,790.42	\$ 35,790.42	\$ 34,114.54		\$ 37,773.10	\$ 36,741.00		\$ 41,260.03		\$ 42,497.83	Estimate
HEALTH INSURANCE	154	\$ 151,045.54	\$ 146,320.95	\$ 140,108.37		\$ 168,195.84	\$ 158,647.46		\$ 174,713.97		\$ 179,955.39	Estimate
LIFE INSURANCE	155	\$ 606.52	\$ 606.52	\$ 840.37		\$ 668.18	\$ 1,050.60		\$ 1,142.91		\$ 1,177.20	Estimate
COMP EARNED	164	\$ -	\$ -	\$ -		\$ -	\$ -		\$ -		\$ -	
		\$ 943,289.29	\$ 938,564.70	\$ 900,714.59		\$ 993,770.48	\$ 946,631.21		\$ 1,011,056.37		\$ 1,041,388.06	

PURCHASED SERVICES	ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Estimate	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
SERVICES NON-IT	210	\$ 44,195.00	\$ 44,195.00	\$ 42,389.59	Audit \$1692 Legal \$2350 Snowplowing \$3895 Electronic monitoring \$450 Window cleaning \$1,620 DDC Yearly Service \$1,000 Boiler inspection \$175 Fire extinguisher inspection \$150 Pest control \$ 376 Sprinkler & fire alarm inspection \$900 Cleaning \$7980 Bridges (CAFE) annual support 4% increase \$22,627 Back Flow Inspections \$1000	\$ 43,636.00	\$ 40,694.27	Audit \$1927 Legal \$2400 Snowplowing \$3900 Electronic monitoring \$500 - Alarm Window cleaning \$2100 DDC Yearly Service \$1,000 - HVAC Boiler inspection \$175 Fire extinguisher inspection \$150 Pest control \$ 450 Sprinkler & fire alarm inspection \$900 Cleaning \$7980 Bridges (CAFE) annual support 4% increase \$22,195 Back Flow Inspections \$1000	\$ 45,187.00	Audit \$2162 Legal \$2450 Snowplowing \$3925 Electronic monitoring \$500 - Alarm Window cleaning \$2250 DDC Yearly Service \$1,000 - HVAC Boiler inspection \$175 Fire extinguisher inspection \$150 Pest control \$ 500 Sprinkler & fire alarm inspection \$900 Cleaning \$7980 Bridges (CAFE) annual support 5% increase \$22,195 Back Flow Inspections \$1000	\$ 46,496.00	Audit \$2162 Legal \$2524 Snowplowing \$4082 Electronic monitoring \$500 - Alarm Window cleaning \$2440 DDC Yearly Service \$1,000 - HVAC Boiler inspection \$175 Fire extinguisher inspection \$150 Pest control \$ 500 Sprinkler & fire alarm inspection \$900 Cleaning \$7980 Bridges (CAFE) annual support 4% increase \$23,083 Back Flow Inspections \$1000
SERVICES IT	211	\$ 13,000.00	\$ 13,000.00	\$ 12,755.00	IT contractor; estimate based on 3-year average	\$ 13,000.00	\$ 1,415.00	Check with Joe	\$ 13,000.00	Check with Joe	\$ 16,000.00	New IT Firm - Taylor
PROGRAMS	212	\$ 16,000.00	\$ 13,000.00	\$ 12,941.00	Juvenile - \$10K Adult/Outreach/Misc. \$3K	\$ 15,250.00	\$ 14,082.55	Juvenile \$12K Adult/Outreach/Misc. \$3250	\$ 16,000.00	Juvenile \$12,000 Adult/Outreach/Misc. \$4,000	\$ 16,000.00	Juvenile \$12,000 Adult/Outreach/Misc. \$4,000
ELECTRIC & WATER	222	\$ 29,000.00	\$ 29,000.00	\$ 27,828.14	From City Hall	\$ 31,000.00	\$ 26,894.89	From City Hall	\$ 32,000.00		\$ 33,000.00	CITY Hall
GAS & HEAT	224	\$ 12,000.00	\$ 11,000.00	\$ 8,154.12	2022 average \$916.66 x 12 mon	\$ 11,000.00	\$ 7,207.26		\$ 11,000.00		\$ 11,000.00	
PHONE	225	\$ 672.00	\$ 672.00	\$ 672.60	56 x 12 months	\$ 720.00	\$ 672.84	\$60 x 12 months	\$ 744.00	\$62 x 12 months	\$ 696.00	\$58 x 12 months
INTERNET	226	\$ 5,900.00	\$ 5,900.00	\$ 5,908.26	Teach line \$1,200 Internet \$155 x 12 \$1,860 HotSpots \$20.5 x 11 = \$225.50/month x 12 = \$2,706	\$ 5,940.00	\$ 5,743.53	Teach line \$1,200 Internet \$165 x 12 \$1,980 HotSpots \$230/month x 12 = \$2,760	\$ 5,940.00	Teach line \$1,200 Internet \$165 x 12 \$1,980 HotSpots \$230/month x 12 = \$2,760	\$ 5,940.00	Teach line \$1,200 Internet \$165 x 12 \$1,980 HotSpots \$230/month x 12 = \$2,760
MAINT CONT NON-IT	240	\$ 4,895.00	\$ 4,895.00	\$ 6,126.24	copiers - staff \$249 x 12 = \$3,000 public \$40 x 12 = \$470 sprinkler maintenance \$950 doors \$475	\$ 6,985.00	\$ 7,034.00	copiers - staff \$423 x 12 = \$5080 public \$40 x 12 = \$480 sprinkler maintenance \$950 doors \$475	\$ 6,985.00	copiers - staff \$423.33 x 12 = \$5080 public \$40 x 12 = \$480 sprinkler maintenance \$950 doors \$475	\$ 6,309.60	staff \$283.72 x 12 = \$3404.6 + \$1000 overage public \$40 x 12 = \$480 sprinkler maintenance \$950 doors \$475
MAINT CONT IT	241	\$ 3,085.00	\$ 3,085.00	\$ 3,356.36	RFID Maintenance	\$ 3,500.00	\$ 3,261.00	RFID Maintenance	\$ 3,600.00	RFID Maintenance	\$ 3,500.00	RFID Maintenance
		\$ 128,747.00	\$ 124,747.00	\$ 120,131.31		\$ 131,031.00	\$ 107,005.34		\$ 134,456.00		\$ 138,941.60	
OPERATING EXPENSES	ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Estimate	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
OFFICE SUPPLIES	310	\$ -										
POSTAGE	311	\$ 360.00	\$ 360.00	\$ 516.84	Library Postage	\$ 360.00	\$ 420.49	Library Postage	\$ 360.00	Library Postage	\$ 360.00	Library Postage
PRINTING	313	\$ 1,800.00	\$ 1,800.00	\$ 41.57	SLP brochures \$1,400 Misc \$400	\$ 400.00	\$ 238.28	SLP brochures \$1,400 Misc \$400	\$ 400.00	Misc \$400	\$ 400.00	Misc \$400
MEMBERSHIP DUES	320	\$ 830.00	\$ 830.00	\$ 660.00	WLA Board Member \$75 WLA Library \$255 ALA Library \$215 Amazon Prime \$139 OCONOMOWOC AREA HISTORICAL SOCIETY MEMBERSHIP \$50 WAUKESHA HISTORICAL SOCIETY MEMBERSHIP \$30 WI HISTORICAL SOCIETY - \$65	\$ 930.00	\$ 867.99	WLA Board Member \$80 WLA Library \$270 ALA Library \$245 Amazon Prime \$139 OCONOMOWOC AREA HISTORICAL SOCIETY MEMBERSHIP \$60 WAUKESHA HISTORICAL SOCIETY MEMBERSHIP \$30 WI HISTORICAL SOCIETY \$75	\$ 810.00	WLA Board Member \$80 WLA Library \$275 ALA Library \$255 Amazon Prime \$139 OCONOMOWOC AREA HISTORICAL SOCIETY MEMBERSHIP \$60 WAUKESHA HISTORICAL SOCIETY MEMBERSHIP \$150	\$ 799.00	WLA Board Member \$80 WLA Library \$275 ALA Library \$215 Amazon Prime \$139 OCONOMOWOC AREA HISTORICAL SOCIETY MEMBERSHIP \$60 Youtube Subscription \$150.00 - Programing WAUKESHA HISTORICAL SOCIETY MEMBERSHIP \$150?? - \$30
BOOKS	321	\$ 92,000.00	\$ 90,500.00	\$ 86,378.29	Adult Books \$62,000 - \$61,000 Kids and Teens Books \$30,000 - \$29,500	\$ 92,000.00	\$ 85,666.69	Adult Books \$62,000 Kids and Teens Books \$30,000	\$ 92,000.00	Adult Books \$62,000 Kids and Teens Books \$30,000	\$ 92,000.00	Adult Books \$62,000 Kids and Teens Books \$30,000

SERIALS/PERIODICALS	322	\$ 9,000.00	\$ 8,000.00	\$ 7,338.45	Magazines \$8500 Newspapers \$500	\$ 6,500.00	\$ 6,522.61	Magazines \$6000 Newspapers \$500	\$ 6,500.00	Magazines \$6000 Newspapers \$500	\$ 6,500.00	Magazines \$6000 Newspapers \$500
AUDIO VISUAL	323	\$ 15,000.00	\$ 13,500.00	\$ 12,694.45	Adult AV \$11,000 Kids and Teen AV \$2,500	\$ 14,500.00	\$ 12,699.04	Adult AV \$13,000 \$12,000 Kids and Teen AV \$3,000 \$2,500	\$ 14,000.00	Adult AV \$12,000 Kids and Teen AV \$2,500	\$ 14,000.00	Adult AV \$12,000 Kids and Teen AV \$2,000
LIC/PERMIT	324	\$ 6,515.00	\$ 4,915.00	\$ 4,620.09	antivirus \$500 Faronics DeepFreeze \$ 1,344 Envisionware \$140 LibCal \$700 GoDaddy domain renewal \$130 Phone software \$350 Zoom \$216 wireless printing software \$550 misc. software & comp licenses \$485 Security camera \$1600 Movie License \$500	\$ 3,560.00	\$ 2,632.33	antivirus \$500 Faronics DeepFreeze \$ 400 Envisionware \$150 LibCal \$750 GoDaddy domain renewal \$135 Phone software \$350 Zoom \$240 wireless printing software \$550 misc. software & computer licenses \$485 Movie License \$500	\$ 3,660.00	antivirus \$550 Faronics DeepFreeze \$ 450 Envisionware \$200 LibCal \$750 *New Library calendar GoDaddy domain renewal \$145 Phone software \$400 Zoom \$280 wireless printing software \$550 misc. software & computer licenses \$485 Movie License \$600	\$ 3,240.00	antivirus \$550 Faronics DeepFreeze \$ 450 Envisionware \$335 GoDaddy domain renewal \$170 Phone software \$400 Zoom \$275 wireless printing software \$500 misc. software & computer licenses \$485 Seed Labelers License \$25 Movie License \$600
OPERATING EXPENSES	ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Estimate	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
E-MEDIA	325	\$ 23,624.00	\$ 24,624.00	\$ 29,345.03	Gale Courses \$3,472 Flipster \$1,065 Databases \$1,532 OverDrive Advantage \$5,326 WPLC Buying pool \$4,708 hoopla \$6900 - Grant accounted for New total \$7900 Netflix \$240 Disney+ Bundle \$177 Acorn TV \$84 Apple TV \$60 Paramount + \$60	\$ 22,139.00	\$ 30,163.40	Online Learning \$5000 (Tentative) Flipster \$1,065 Databases \$1590 \$1,578 OverDrive Advantage \$5,400 \$5614 WPLC Buying pool \$4,708 \$4493 Hoopla \$9400 (Hoopla Grant: \$6,175) Netflix \$240 Disney+ Bundle \$205 Acorn TV \$84 Apple TV \$75 Paramount +/Showtime \$135 Max \$160 Funimation/CrunchyRoll \$90 Peacock TV \$65	\$ 23,608.00	Online Learning \$5000 (Tentative) Databases \$1,692 OverDrive Advantage \$5747 WPLC Buying pool \$4794 Hoopla \$16,800 (1400x12 months) 13800 Advantage emedia grant \$-3,448 Disney+ Bundle \$264 Acorn TV \$102 Apple TV \$132 Paramount +/Showtime \$156 Max \$160 CrunchyRoll \$ 144 Peacock TV \$65	\$ 26,926.00	Databases \$1,800 OverDrive Advantage \$5950 WPLC Buying pool \$4950 Hoopla \$24,000 (2,000x12 months) Advantage \$13000 emedia grant \$-??? Disney+ Bundle \$264 Acorn TV \$102 Apple TV \$132 Paramount +/Showtime \$156 Max \$160 CrunchyRoll \$ 144 Peacock TV \$65 BritBox \$95 Starz \$108
PUBLICITY	326	\$ 1,520.00	\$ 1,520.00	\$ 748.83	Chamber ad \$600 Online Marketing \$720 Jobs Ads \$200	\$ 700.00	\$ 132.64	Chamber ad \$600 Online Marketing \$720 \$500 Jobs Ads \$200	\$ 700.00	Online Marketing \$500 Jobs Ads \$200	\$ 500.00	Online Marketing \$300 Jobs Ads \$200
SAFETY SUPPLIES	341	\$ -	\$ -	\$ -		\$ -	\$ -		\$ -		\$ -	
TRAINING & TRAVEL	330	\$ 6,000.00	\$ 4,000.00	\$ 3,867.94	Mileage \$1,600 Conferences \$1900 Training \$500	\$ 3,250.00	\$ 3,988.09	Mileage \$1,600 \$1,300 Conferences \$1900 \$1,450 Training \$500	\$ 4,000.00	Mileage \$1,600 Conferences \$1900 Training \$500	\$ 4,000.00	Mileage \$1,600 Conferences \$1900 Training \$500
CAR ALLOWANCE	332	\$ 144.00	\$ 144.00	\$ 144.04	Do not enter, city will provide	\$ 143.99	\$ 144.04	CITY to Provide	\$ 143.99	CITY to Provide	\$ 145.00	CITY to Provide
OPERATING SUPPLIES	340	\$ 39,600.00	\$ 24,600.00	\$ 23,425.39	Cataloging supplies \$10,500 Circulation supplies \$1,000 Small furnishings \$2,000 Equipment \$2,500 Office supplies \$4,500 Safety supplies \$100 Janitorial supplies \$4,000	\$ 24,600.00	\$ 24,559.34	Cataloging supplies \$10,500 Circulation supplies \$1,000 Small furnishings \$2,000 Equipment \$2,500 Office supplies \$7,000 \$6,500 \$4500 Safety supplies \$100 Janitorial supplies \$4,000	\$ 30,100.00	Cataloging supplies \$10,500 Circulation supplies \$1,000 Small furnishings \$4,000 Equipment \$4,000 Office supplies \$6500 Safety supplies \$100 Janitorial supplies \$4,000	\$ 30,100.00	Cataloging supplies \$10,500 Circulation supplies \$1,000 Small furnishings \$4,000 Equipment \$4,000 Office supplies \$6500 Safety supplies \$100 Janitorial supplies \$4,000
JANITORIAL SUPPLIES	343	\$ -	\$ -	\$ -		\$ -	\$ -		\$ -		\$ -	
COMP/TECH EQUIPMENT	345	\$ 14,400.00	\$ 9,000.00	\$ 8,688.74	Computers \$5,500 - \$3,500 Computer equipment & accessories \$4,500 - 1000 Firewall \$2,000 - *NEW Security Cameras \$2400 - *NEW	\$ 10,400.00	\$ 10,164.65	Computers \$5,500 Computer equipment & accessories \$4,500 Firewall \$400	\$ 10,400.00	Computers \$5,500 Computer equipment & accessories \$4,500 Firewall \$400	\$ 10,400.00	Computers \$5,500 Computer equipment & accessories \$4,500 Firewall \$400
		\$ 210,793.00	\$ 183,793.00	\$ 178,469.66		\$ 179,482.99	\$ 178,199.59		\$ 186,681.99		\$ 189,370.00	

MAINTENANCE		ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Estimate	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
REPAIR/MAINT BUILDING	400		\$ 11,000.00	\$ 10,000.00	\$ 15,988.77	Signs paint, air filters, belts, light bulbs \$1,500 building repairs/part replacements \$9,500 - \$8,500	\$ 10,000.00	\$ 9,333.38	paint, air filters, belts, light bulbs \$1,500 building repairs/part replacements \$8,500	\$ 10,000.00	paint, air filters, belts, light bulbs \$1,500 building repairs/part replacements \$8,500 Power-wash building \$2,500	\$ 10,000.00	paint, air filters, belts, light bulbs \$1,500 building repairs/part replacements \$8,500 New Railing \$15,100
REPAIR/MAINT EQUIP	410/ 435		\$ 500.00	\$ 500.00	\$ 627.04	Batteries, fire extinguisher recharging	\$ 750.00	\$ 418.12	Batteries, fire extinguisher recharging	\$ 750.00	Batteries, fire extinguisher recharging	\$ 750.00	Batteries, fire extinguisher recharging
			\$ 11,500.00	\$ 10,500.00	\$ 16,615.81		\$ 10,750.00	\$ 9,751.50		\$ 10,750.00		\$ 10,750.00	
FIXED CHARGES		ACCT	2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET	2024 Estimate	2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
TECHNOLOGY	509		\$ 10,240.00	\$ 10,240.00	\$ 10,240.00		\$ 9,270.00	\$ 9,270.00	City	\$ 10,600.00	City	\$ 12,190.00	City
RISK MANAGEMENT	510		\$ 21,990.00	\$ 21,990.00	\$ 21,990.00		\$ 23,605.00	\$ 23,605.00	City	\$ 24,130.00	City	\$ 24,733.25	City
COPIER LEASE	530		\$ 3,515.00	\$ 3,515.00	\$ 2,989.08	Copier Lease	\$ 3,515.00	\$ 3,118.62	Copier Lease	\$ 3,515.00	Copier Lease	\$ 2,600.00	Copier Lease - 216.67 *12
			\$ 35,745.00	\$ 35,745.00	\$ 35,219.08		\$ 36,390.00	\$ 35,993.62		\$ 38,245.00		\$ 39,523.25	
EXPENSES TOTAL			2023 BUDGET	2023 FINAL BUDGET	2023 ACTUAL	2023 NOTES	2024 BUDGET		2024 NOTES	2025 BUDGET	2025 NOTES	2026 BUDGET	2026 NOTES
Total			\$ 1,330,074.29	\$ 1,293,349.70	\$ 1,251,150.45		\$ 1,351,424.47	\$ 1,277,581.26		\$ 1,381,189.36		\$ 1,419,972.91	
City Share			\$837,691	\$800,967	\$756,776		\$854,605	\$778,065		\$868,045		\$861,973	
OPERATING BUDGET			\$ 386,785.00	\$ 354,785.00	\$ 350,435.86		\$ 357,653.99	\$ 330,950.05		\$ 370,132.99		\$ 378,584.85	

STRATEGIC PLAN 2025

SECOND QUARTER PROGRESS REPORT



MISSION

The Oconomowoc Public Library's staff, collections, services, and spaces provide the opportunity for our diverse community to explore, discover, learn, and grow, enriching individual lives and our community.

STRATEGIC PLAN

The Library Board of Trustees supports the staff's implementation of the Strategic Plan and Mission Statement. Staff use the Strategic Plan and Mission Statement to guide decision making and to define the scope of Library Services.

LIFELONG LEARNING

We are committed to fostering curiosity and quenching every thirst for knowledge—it's the core of everything we do and evident to everyone we serve.

Find effective, innovative ways to support all learners.

- **We have started a Library of Things collection. This collection helps patrons and the community by:**
 1. **Avoiding unnecessary production and purchase of items that are only used occasionally.**
 2. **Allowing community members to share resources and minimize environmental impact.**
 3. **Allowing patrons to try out new skills or hobbies.**
 4. **Giving patrons access to items that they may not be able to afford.**

Explore additional opportunities to serve older adults and those living with memory loss.

- **Kelsey Butterfield does several one-on-one tech help sessions a week. The majority is helping older adults with device set-up and working apps.**
- **We have started circulating the Zoomax Snow 12, which is an extremely high-powered portable magnifier that does both magnification and text to speech for those with sight issues.**
- **Jennie Fiddler delivers books to 7 senior living centers a month.**

Seek opportunities to grow the collection in creative ways that reflect the growth and changing needs of our community.

- **We will continue to expand our Library of Things.**
- **We received a \$2,000 grant to add STEM Kits to our Library of Things. We can create 20 stem kits. We will have five kits per subject for ages 8 to 12.**
- **We have had 82 checkouts of Wonderbooks since early June.**

COMMUNITY ENGAGEMENT

We will partner with individuals, businesses, nonprofits, and schools to deliver relevant and timely services and access to information.

Seek innovative ways to serve current patrons and reach new ones.

- **Jen Puccini will continue to do presentations to local organizations sharing all the programs and resources the library has to offer.**
- **Staff will continue to be at local community events such as Kids' Fest and National Night Out to reach new patrons.**
- **We continue to expand our Library of Things with more Explore Passes, Rokus, and outdoor games etc.**

Build new community relationships and partnerships.

- **Jen Puccini is attending Women in Business monthly through the Chamber of Commerce to work on building new relationships.**
- **Collaborate on author visits with Books & Company**
- **Journey21 – interns working at the library**
- **YMCA Storytime with Loki**
- **Used book donation to Waukesha and Jefferson jail along with Rogers Memorial Hospital**
- **Multigenerational Storytime at Shorehaven**

Explore and engage in Library fundraising activities as appropriate and advisable by the Board of Trustees.

- **Two book sales a year. We collect donated books though out the year to sell at the book sale.**

DIVERSITY & INCLUSION

Everyone in our community will recognize themselves in the diversity of our collection and programming.

Ensure that staffing meets the evolving needs of our community.

- **The staff is looking at ways to connect and better serve homeschooling families in the community. Jennie Fidler has started doing monthly homeschooling programs which have been very successful.**

Develop and maintain inclusive, safe, welcoming spaces and services. Continue commitment to improving the Library facility's accessibility.

- **We rearranged our collection and moved our new books to the front of the library which improved access for patrons with mobility issues. We also expanded the space available to the children and teen collection.**
- **We added Aunt Flow dispensers in two of the bathrooms which gives patrons access to free supplies.**

Library staff will complete a diversity audit of all areas of the Library collection.

- **Kelsey Butterfield continues to use the Baker & Taylor Collection Analysis Tool purchased by Bridges to complete our diversity audit. This was completed in 2025.**