

Public Notice of Regular Meeting of the Pewaukee Public Library Board of Trustees

Pursuant to section 19.84 (2) and (3) of the Wisconsin Statutes, notice is hereby given to the public and to those news media who have filed a written or electronic request for this notice, that the annual meeting of the Pewaukee Public Library Board of Trustees will be held on Wednesday, April 15, 2026 at 6:30 p.m. The meeting will be held in the Visaya Room at the Pewaukee Public Library, 210 Main Street, Pewaukee, WI 53072.

PEWAUKEE PUBLIC LIBRARY BOARD ANNUAL MEETING - AGENDA Wednesday, April 15, 2026 at 6:30 p.m.

As of the date of this notice, the subject matter known to be intended for consideration is as follows:

1. Call Meeting to Order and Roll Call

REGULAR BUSINESS:

2. Citizen Comments/Correspondence
3. Approval of Consent Agenda
 - a. Minutes March 18, 2026
 - b. Financial Reports:
 - i. GL Budget Vs Actual Library – March 2026
 - ii. GL Detail Library – March 2026
 - iii. Payment Approval Report – March 2026
 - iv. LGIP Statement – March 2026
 - c. Library Monthly Statistics Report though March 2026
 - d. Library Directors Report April 2026

OLD BUSINESS:

4. Discussion and possible action to approve the library standards as part of the proposed Waukesha County Library Services Plan 2027-2031

NEW BUSINESS:

5. Discussion and possible action on the Allowable Cost Worksheet for Waukesha County Libraries in the Bridges Library System
6. Discussion and possible action to designate certain library furnishings as surplus and authorize their sale through Wisconsin Surplus Online Auction.
7. Discussion and possible action on TE08: Developing the Library Budget
8. Closed Session – The Library Board will recess into closed session pursuant to § 19.85(1)(e) Wisconsin Statute for the following reason:
 - (c) Considering employment, promotion, compensation or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility specifically for the purpose of discussing compensation for the Library Director and for consideration of a temporary leave of absence by a library employee.

You are further notified that at the conclusion of the Closed Session, the Library Board may convene into open session pursuant to 19.85(2), Stats., for possible additional discussion and action concerning any matters discussed in closed session and for adjournment.
9. ADJOURNMENT

NEXT MEETING SCHEDULED: Wednesday, May 20, 2026

LOCATION: Visaya Room, Pewaukee Public Library, 210 Main Street, Pewaukee, WI 53072

The Pewaukee Public Library is committed to providing the highest degree of accessibility within its means when conducting library-sponsored events. Please notify us of your disability-related accommodation requests two weeks prior to a Library Board meeting by calling (262) 691-5670, extension 920. We will attempt to honor all requests but cannot assure that requests made too close to the date will be able to be accommodated.

Posted: Friday, April 10, 2026

PEWAUKEE PUBLIC LIBRARY BOARD MEETING
Wednesday, March 18, 2026 at 6:30 p.m.

1. Call Meeting to Order and Roll Call 6:30pm

Members Present: Lisa Jansen, Leslie Miller, Dale Noll, Rachel Pader
Phil Vetterkind, Karen Wildman,

Others Present: Nan Champe (Library Director)

Members Excused: Ann Wright

REGULAR BUSINESS:

2. Citizen Comments/Correspondence

3. Approval of Consent Agenda

a. Minutes February 18, 2026

b. Financial Reports:

i. GL Budget Vs Actual Library – February 2026

ii. GL Detail Library – February 2026

iii. Payment Approval Report – February 2026

iv. LGIP Statement – February 2026

c. Library Monthly Statistics Report though February 2026

d. Library Directors Report March 2026

Motion to approve: Phil Vetterkind

Second: Leslie Miller

Motion Carried Rachel Pader abstains from voting on the minutes

OLD BUSINESS:

4. Discussion and possible action on closing of the Library for Staff Development Day on Friday, April 17, 2026.

Motion to approve: Lisa Jansen

Second: Phil Vetterkind

Motion Carried

NEW BUSINESS:

5. Discussion and possible action to approve the Bid Proposal from M.M. Schranz Roofing, Inc for the Base Bid of \$134,800.00 and the Alternative #1 for an additional \$26,500.00.

Motion to approve: Dale Noll moves that the Pewaukee Library Board accept the base bid of \$134,800.00 from M.M. Schranz Roofing, contingent on the city and village approval of the project. And that the Pewaukee Library Board recommends rejecting the alternative bid.

Second: Phil Vetterkind

Motion Carried

6. Discussion and possible action on the draft RFP for 2026 HVAC Control System Upgrade

Motion to approve: Phil Vetterkind

Second: Rachel Pader

Motion Carried

7. Appointment of an Ad Hoc Committee by the President to evaluate options and make a purchase recommendation to the Library Board as part of the 2026 HVAC Control System Upgrade.

Motion to approve: Leslie Miller moves to approve the Ad Hoc Committee of Phil Vetterkind, Nan Champe & Harwood Engineering to evaluate options & make purchase recommendations to the Library Board for the 2026 HVAC Control System Upgrade.

Second: Rachel Pader

Motion Carried

8. Discussion and possible action to approve a proposal to update the Library's Website.

Motion to approve: Leslie Miller moves to approve the Library Market bid to update the Pewaukee Library's Website

Second: Phil Vetterkind

Motion Carried

9. Informational update on the Library Foundation and the Friends of the Library

No Action

10. Discussion and possible action on TE07: Library Board and Library Personnel

No Action

11. ADJOURNMENT 7:30pm

Motion to approve: Lisa Jansen

Second: Phil Vetterkind

Motion Carried

NEXT MEETING SCHEDULED: Wednesday, April 15, 2026

End.GLPeriod 326

Account Number	Account Title	MTD	YTD	Budget	Variance	% Budget
200 - CAPITAL PROJECTS FUND						
200-00-57140-000-000	LIBRARY(E)	.00	.00	.00	.00	100.00%
Total Expenditure:		.00	.00	.00	.00	
200-00-47140-000-000	LIBRARY CAPITAL REV(R)	.00	.00	.00	.00	100.00%
Total Revenue:		.00	.00	.00	.00	
Total 200 - CAPITAL PROJECTS FUND:		.00	.00	.00	.00	

End.GLPeriod 326

Account Number	Account Title	MTD	YTD	Budget	Variance	% Budget
900 - LIBRARY FUND						
900-00-11101-000-000	LIBRARY CASH(A)	-24,951.05	73,901.65	.00	-73,901.65	100.00%
900-00-11109-000-000	LIBRARY GIFT ACCOUNT(A)	.00	.00	.00	.00	100.00%
900-00-12000-000-000	ACCOUNTS RECEIVABLE(A)	.00	.00	.00	.00	100.00%
900-00-12004-000-000	DUE FROM CITY OF PEWAUKEE(A)	.00	.00	.00	.00	100.00%
900-00-12004-000-100	DUE FROM GENERAL FUND(A)	.00	.00	.00	.00	100.00%
900-00-16552-000-000	LGIP #16 LIBRARY LGIP(A)	.00	104,188.89	.00	-104,188.89	100.00%
900-00-17100-000-000	PREPAID EXPENSES(A)	.00	.00	.00	.00	100.00%
900-00-11105-000-000	NORTH SHORE CD INVESTMENT(A)	1,460.94	160,543.30	.00	-160,543.30	100.00%
900-00-11000-000-000	LIBRARY SWEEP(A)	9,369.10	25,974.71	.00	-25,974.71	100.00%
Total Asset:		-14,121.01	364,608.55	.00	-364,608.55	
900-00-31101-000-000	FUND BALANCE(Q)	.00	-274,125.42	.00	274,125.42	100.00%
Total Equity:		.00	-274,125.42	.00	274,125.42	
900-00-55110-000-110	LIBRARY SALARIES & WAGES(E)	54,355.37	154,448.60	708,590.00	554,141.40	21.79%
900-00-55110-000-130	LIBRARY FRINGE BENEFITS(E)	16,249.88	61,121.51	220,186.00	159,064.49	27.75%
900-00-55110-000-140	LIBRARY-SUBSCRIPTIONS(E)	.00	1,364.25	7,000.00	5,635.75	19.48%
900-00-55110-000-150	LIBRARY FISCAL AGENT/INS CHGS(E)	5,518.53	22,347.78	47,015.00	24,667.22	47.53%
900-00-55110-000-310	LIBRARY-BUILDING MAINTENANCE(E)	6,666.43	22,240.05	92,813.00	70,572.95	23.96%
900-00-55110-000-400	LEGAL COUNSEL-LIBRARY ATTORNEY(E)	.00	.00	4,000.00	4,000.00	0.00%
900-00-55110-000-500	DONATION FUNDED EXPENSE(E)	198.02	2,175.51	7,000.00	4,824.49	31.07%
900-00-57610-000-000	LIBRARY OUTLAY(E)	.00	.00	39,000.00	39,000.00	0.00%
900-00-55110-000-141	LIBRARY-PRINTED MATERIALS(E)	5,028.92	15,456.95	80,500.00	65,043.05	19.20%
900-00-55110-000-142	LIBRARY-NON-PRINT MATERIALS(E)	509.31	4,052.47	14,700.00	10,647.53	27.56%
900-00-55110-000-143	LIBRARY-TECHNOLOGY(E)	.00	7,901.58	45,526.00	37,624.42	17.35%
900-00-55110-000-144	LIBRARY-MILEAGE, SUPPLIES, ETC(E)	564.20	2,212.53	13,600.00	11,387.47	16.26%

End.GLPeriod 326

Account Number	Account Title	MTD	YTD	Budget	Variance	% Budget
900-00-55110-000-146	LIBRARY-STAFF DEVELOPMENT(E)	.00	845.82	3,000.00	2,154.18	28.19%
900-00-55110-000-311	LIBRARY-UTILITIES(E)	4,565.92	9,884.09	53,034.00	43,149.91	18.63%
900-00-55110-000-312	LIBRARY-DIGITAL MATERIALS(E)	.00	3,497.62	26,537.00	23,039.38	13.18%
900-00-55110-000-313	LIBRARY-PROGRAMS(E)	414.92	1,081.73	5,000.00	3,918.27	21.63%
900-00-55110-000-450	GRANT FUNDED EXPENSE(E)	726.19	744.79	6,763.00	6,018.21	11.01%
900-00-55110-000-160	LIBRARY ANNUAL MUNICIPAL FEES(E)	.00	.00	2,200.00	2,200.00	0.00%
Total Expenditure:		94,797.69	309,375.28	1,376,464.00	1,067,088.72	
900-00-21400-000-000	VOUCHERS PAYABLE(L)	26,728.28	-6,532.65	.00	6,532.65	100.00%
900-00-21400-000-100	FLEX BENEFITS PAYABLE(L)	.00	.00	.00	.00	100.00%
900-00-21401-000-000	DEFERRED REVENUE(L)	.00	.00	.00	.00	100.00%
900-00-21402-000-000	ACCRUED PAYROLL(L)	.00	.00	.00	.00	100.00%
900-00-21500-000-000	WISCONSIN SALES TAX(L)	.00	.00	.00	.00	100.00%
900-00-21720-000-000	DUE TO OTHER FUNDS(L)	.00	.00	.00	.00	100.00%
900-00-23503-000-000	DEPOSITS - CITY CONTRIBUTIONS(L)	.00	.00	.00	.00	100.00%
900-00-23504-000-000	DEPOSITS - DES GRNTS/DONATIONS(L)	.00	.00	.00	.00	100.00%
Total Liability:		26,728.28	-6,532.65	.00	6,532.65	
900-00-43790-000-000	COUNTY LIBRARY AIDS(R)	-1,520.15	-4,921.15	-134,368.00	-129,446.85	3.66%
900-00-46710-000-000	LIBRARY FINES(R)	-1,000.56	-2,852.74	-8,054.00	-5,201.26	35.42%
900-00-48110-000-000	INTEREST INCOME(R)	-1,460.94	-2,127.83	-6,214.00	-4,086.17	34.24%
900-00-48200-000-100	FISCAL AGENT FEES(R)	.00	.00	.00	.00	100.00%
900-00-48500-000-000	DONATIONS, PRIVATE OR ORGANIZ(R)	-2,551.20	-13,015.65	-7,000.00	6,015.65	185.93%
900-00-48500-000-100	MISC REVENUES(R)	-299.79	-853.53	-15,645.00	-14,791.47	5.45%
900-00-48500-000-200	DESIGNATED GRANTS(R)	-3,272.00	-3,272.00	-7,263.00	-3,991.00	45.05%
900-00-49000-000-000	CITY CONTRIBUTION PAYMENTS(R)	-74,205.50	-296,822.00	-890,466.00	-593,644.00	33.33%
900-00-49001-000-000	VILLAGE CONTRIBUTION PAYMENTS(R)	-22,369.42	-67,108.26	-268,433.00	-201,324.74	25.00%

End.GLPeriod 326

Account Number	Account Title	MTD	YTD	Budget	Variance	% Budget
900-00-49200-000-000	TRANSFER IN FROM MUNICIPALITY(R)	.00	.00	.00	.00	100.00%
900-00-49300-000-000	FUND BALANCE APPLIED(R)	.00	.00	-39,021.00	-39,021.00	0.00%
900-00-48440-000-000	INSURANCE RECOVERIES(R)	.00	.00	.00	.00	100.00%
900-00-48500-000-300	COPIES & ROOM RENTAL(R)	-725.40	-2,352.60	.00	2,352.60	100.00%
Total Revenue:		-107,404.96	-393,325.76	-1,376,464.00	-983,138.24	
Total 900 - LIBRARY FUND:		.00	.00	.00	.00	
Total:		.00	.00	.00	.00	

End.GLPeriod 326 AND Start.GLPeriod 326

Date	Ref#	Journal	Description	Activity	Job	Debit	Credit
Fund900 - LIBRARY FUND							
Account Number And Title900-00-11000-000-000 - LIBRARY SWEEP							
03/10/2026	1077-1	CR	LIB CASH - LIBRARY SWEEP - H			299.18	.00
03/10/2026	1078-1	CR	LIB CHECKS - LIBRARY SWEEP - A			375.60	.00
03/10/2026	1079-1	CR	LIB CC - LIBRARY SWEEP - V			256.77	.00
03/13/2026	1116-1	CR	LIB CASH - LIBRARY SWEEP - H			261.97	.00
03/13/2026	1117-1	CR	LIB CHECKS - LIBRARY SWEEP - A			437.85	.00
03/13/2026	1118-1	CR	LIB CC - LIBRARY SWEEP - V			85.12	.00
03/20/2026	1158-1	CR	LIB CASH - LIBRARY SWEEP - H			82.74	.00
03/20/2026	1159-1	CR	LIB CHECKS - LIBRARY SWEEP - A			30.00	.00
03/20/2026	1160-1	CR	LIB CC - LIBRARY SWEEP - V			125.06	.00
03/27/2026	1213-1	CR	LIB CASH - LIBRARY SWEEP - H			310.21	.00
03/27/2026	1214-1	CR	LIB CHECKS - LIBRARY SWEEP - A			7,104.60	.00
Account Number And Title900-00-11000-000-000 - LIBRARY SWEEP						9,369.10	.00
Account Number And Title900-00-11101-000-000 - LIBRARY CASH							
03/04/2026	19-1	CA-CDA	CDA Fund Allocation - Created: 03/12/26 2:29 PM			.00	-9,470.69
03/06/2026	9-1	CA-CDA	CDA Fund Allocation - Created: 03/05/26 2:12 PM			.00	-9,708.79
03/17/2026	61-1	CA-CR	CR Fund Allocation - Created: 03/18/26 8:27 AM			74,205.50	.00
03/17/2026	64-1	CA-CR	CR Fund Allocation - Created: 03/18/26 3:14 PM			74,205.50	.00
03/20/2026	37-1	CA-CDA	CDA Fund Allocation - Created: 03/26/26 2:23 PM			.00	-4,144.41
03/31/2026	4-1	CA	Cash Allocation - Created: 03/06/26 2:20 PM			.00	-20,778.92
03/31/2026	69-1	CA-CR	CR Fund Allocation - Created: 03/19/26 3:11 PM			.00	-74,205.50
03/31/2026	2-1	CA-JE	JE Fund Allocation - Created: 03/06/26 2:20 PM			20,778.92	.00
03/31/2026	5-1	CA-PB	PB Fund Allocation - Created: 03/11/26 3:14 PM			.00	-3,371.49

VILLAGE OF PEWAUKEE

GL Detail

April 06, 2026 12:20 PM

End.GLPeriod 326 AND Start.GLPeriod 326

Date	Ref#	Journal	Description	Activity	Job	Debit	Credit
03/31/2026	12-1	CA-PB	PB Fund Allocation - Created: 03/27/26 7:37 AM			.00	-12,878.39
03/31/2026	5-1	CA-PC	PC Fund Allocation - Created: 03/11/26 3:13 PM			.00	-26,761.33
03/31/2026	12-1	CA-PC	PC Fund Allocation - Created: 03/27/26 7:37 AM			.00	-27,594.04
03/31/2026	27-1	CA-CDA	CDA Fund Allocation - Created: 03/19/26 3:11 PM			.00	-26,006.33
12/31/2026	2-1	CA	Cash Allocation - Created: 01/16/26 9:13 AM			20,778.92	.00
Account Number And Title900-00-11101-000-000 - LIBRARY CASH						189,968.84	-214,919.89
Account Number And Title900-00-11105-000-000 - NORTH SHORE CD INVESTMENT							
03/21/2026	5-1	JE	LIBRARY CD 8937 INT 1.1-3.31.26			753.99	.00
03/21/2026	6-1	JE	LIBRARY CD 8953 INT 1.1-3.31.26			706.95	.00
Account Number And Title900-00-11105-000-000 - NORTH SHORE CD INVESTMENT						1,460.94	.00
Account Number And Title900-00-21400-000-000 - VOUCHERS PAYABLE							
03/02/2026	300000738-1	CDA	ACH WE ENERGIES			4,715.14	.00
03/04/2026	300000745-1	CDA	ACH NORTH SHORE BANK CREDIT CARD			3,333.22	.00
03/06/2026	76231-1	CDA	AMAZON CAPITAL SERVICES, INC.			6.21	.00
03/06/2026	76238-1	CDA	ERIC MANGES			300.00	.00
03/06/2026	76243-1	CDA	INGRAM LIBRARY SERVICES LLC			1,669.86	.00
03/06/2026	76246-1	CDA	MADISON COOPER			70.51	.00
03/06/2026	76247-1	CDA	MIDWEST TAPE			26.99	.00
03/06/2026	76250-1	CDA	PRAIRIE LAKES LIBRARY SYSTEM			2,377.08	.00
03/06/2026	76253-2	CDA	RHYME BUSINESS PRODUCTS, LLC			193.00	.00
03/06/2026	76260-1	CDA	V PRIVATE BAR SERVICES			350.00	.00
03/13/2026	76266-1	CDA	AMAZON CAPITAL SERVICES, INC.			286.47	.00
03/13/2026	76273-1	CDA	INGRAM LIBRARY SERVICES LLC			2,117.85	.00
03/13/2026	76274-1	CDA	J & H HEATING INC			697.08	.00

VILLAGE OF PEWAUKEE

GL Detail

April 06, 2026 12:20 PM

End.GLPeriod 326 AND Start.GLPeriod 326

Date	Ref#	Journal	Description	Activity	Job	Debit	Credit
03/13/2026	76276-1	CDA	MCNAMARA MCCARTHY SCHOOL OF IRISH DANCE			100.00	.00
03/13/2026	76280-1	CDA	MIDWEST TAPE			156.69	.00
03/13/2026	76282-6	CDA	R & R INSURANCE SERVICES INC			2,779.38	.00
03/19/2026	76295-2	CDA	BAKER TILLY US, LLP			.00	-2,616.00
03/19/2026	76315-1	CDA	BAKER TILLY US, LLP			2,616.00	.00
03/20/2026	76296-1	CDA	BATZNER PEST CONTROL INC			124.18	.00
03/20/2026	76297-1	CDA	CENTER POINT LARGE PRINT			51.54	.00
03/20/2026	76302-1	CDA	INGRAM LIBRARY SERVICES LLC			749.15	.00
03/20/2026	76303-1	CDA	JANI-KING OF MILWAUKEE			2,839.70	.00
03/20/2026	76306-7	CDA	MUNICIPAL PROPERTY INSURANCE COMPANY			14,796.90	.00
03/20/2026	76294-1	CDA	AMAZON CAPITAL SERVICES, INC.			262.94	.00
03/20/2026	76295-1	CDA	BAKER TILLY US, LLP			2,616.00	.00
03/27/2026	76316-1	CDA	AMAZON CAPITAL SERVICES, INC.			496.41	.00
03/27/2026	76324-1	CDA	INGRAM LIBRARY SERVICES LLC			2,162.80	.00
03/27/2026	76328-1	CDA	KEMPEN MASONRY LLC			555.00	.00
03/27/2026	76334-1	CDA	MIDWEST TAPE			135.70	.00
03/27/2026	76347-2	CDA	TAYLOR COMPUTER SERVICES, INC			794.50	.00
03/30/2026	300000752-2	CDA	ACH WE ENERGIES			4,565.92	.00
03/31/2026	405-1	AP	Summary Transactions from AP System			.00	-2,193.42
03/31/2026	334-1	AP	Summary Transactions from AP System			.00	-6,383.27
03/31/2026	155-1	AP	Summary Transactions from AP System			.00	-2,616.00
03/31/2026	74-1	AP	Summary Transactions from AP System			.00	-7,919.55
03/31/2026	28-1	AP	Summary Transactions from AP System			.00	-650.00
03/31/2026	11-1	AP	Summary Transactions from AP System			.00	-2,839.70

End.GLPeriod 326 AND Start.GLPeriod 326

Date	Ref#	Journal	Description	Activity	Job	Debit	Credit
Account Number And Title 900-00-21400-000-000 - VOUCHERS PAYABLE						51,946.22	-25,217.94
Account Number And Title 900-00-43790-000-000 - COUNTY LIBRARY AIDS							
03/13/2026	100000004975-1	CR	LIBRARY- COUNTY AIDS - LIBRARY			.00	-382.85
03/27/2026	100000005040-1	CR	LIBRARY- COUNTY AIDS - LIBRARY			.00	-1,137.30
Account Number And Title 900-00-43790-000-000 - COUNTY LIBRARY AIDS						.00	-1,520.15
Account Number And Title 900-00-46710-000-000 - LIBRARY FINES							
03/10/2026	100000004957-1	CR	LIBRARY FINES - LIBRARY			.00	-49.18
03/10/2026	100000004958-1	CR	LIBRARY FINES - LIBRARY			.00	-240.60
03/10/2026	100000004959-1	CR	LIBRARY FINES - LIBRARY			.00	-206.77
03/13/2026	100000004974-1	CR	LIBRARY FINES - LIBRARY			.00	-85.28
03/13/2026	100000004975-2	CR	LIBRARY FINES - LIBRARY			.00	-5.00
03/13/2026	100000004976-1	CR	LIBRARY FINES - LIBRARY			.00	-85.12
03/20/2026	100000004999-1	CR	LIBRARY FINES - LIBRARY			.00	-14.47
03/20/2026	100000005001-1	CR	LIBRARY FINES - LIBRARY			.00	-62.53
03/27/2026	100000005039-1	CR	LIBRARY FINES - LIBRARY			.00	-106.31
03/27/2026	100000005040-2	CR	LIBRARY FINES - LIBRARY			.00	-145.30
Account Number And Title 900-00-46710-000-000 - LIBRARY FINES						.00	-1,000.56
Account Number And Title 900-00-48110-000-000 - INTEREST INCOME							
03/21/2026	5-2	JE	LIBRARY CD 8937 INT 1.1-3.31.26			.00	-753.99
03/21/2026	6-2	JE	LIBRARY CD 8953 INT 1.1-3.31.26			.00	-706.95
Account Number And Title 900-00-48110-000-000 - INTEREST INCOME						.00	-1,460.94
Account Number And Title 900-00-48500-000-000 - DONATIONS, PRIVATE OR ORGANIZ							
03/10/2026	100000004957-2	CR	LIBRARY DONATIONS - LIBRARY			.00	-.40
03/13/2026	100000004975-3	CR	LIBRARY DONATIONS - LIBRARY			.00	-50.00

End.GLPeriod 326 AND Start.GLPeriod 326

Date	Ref#	Journal	Description	Activity	Job	Debit	Credit
03/20/2026	100000004999-2	CR	LIBRARY DONATIONS - LIBRARY			.00	-.80
03/27/2026	100000005040-3	CR	LIBRARY DONATIONS - LIBRARY			.00	-2,500.00
Account Number And Title900-00-48500-000-000 - DONATIONS, PRIVATE OR ORGANIZ						.00	-2,551.20
Account Number And Title900-00-48500-000-100 - MISC REVENUES							
03/10/2026	100000004957-3	CR	LIBRARY MISC REVENUES - LIBRARY			.00	-1.00
03/10/2026	100000004958-2	CR	LIBRARY MISC REVENUES - LIBRARY			.00	-135.00
03/13/2026	100000004974-2	CR	LIBRARY MISC REVENUES - LIBRARY			.00	-60.79
03/20/2026	100000004999-3	CR	LIBRARY MISC REVENUES - LIBRARY			.00	-9.00
03/27/2026	100000005039-2	CR	LIBRARY MISC REVENUES - LIBRARY			.00	-44.00
03/27/2026	100000005040-4	CR	LIBRARY MISC REVENUES - LIBRARY			.00	-50.00
Account Number And Title900-00-48500-000-100 - MISC REVENUES						.00	-299.79
Account Number And Title900-00-48500-000-200 - DESIGNATED GRANTS							
03/27/2026	100000005040-5	CR	LIBRARY GRANT - LIBRARY			.00	-3,272.00
Account Number And Title900-00-48500-000-200 - DESIGNATED GRANTS						.00	-3,272.00
Account Number And Title900-00-48500-000-300 - COPIES & ROOM RENTAL							
03/10/2026	100000004957-4	CR	COPIES & ROOM RENTAL - LIBRARY			.00	-248.60
03/10/2026	100000004959-2	CR	COPIES & ROOM RENTAL - LIBRARY			.00	-50.00
03/13/2026	100000004974-3	CR	COPIES & ROOM RENTAL - LIBRARY			.00	-115.90
03/20/2026	100000004999-4	CR	COPIES & ROOM RENTAL - LIBRARY			.00	-58.47
03/20/2026	100000005000-1	CR	COPIES & ROOM RENTAL - LIBRARY			.00	-30.00
03/20/2026	100000005001-2	CR	COPIES & ROOM RENTAL - LIBRARY			.00	-62.53
03/27/2026	100000005039-3	CR	COPIES & ROOM RENTAL - LIBRARY			.00	-159.90
Account Number And Title900-00-48500-000-300 - COPIES & ROOM RENTAL						.00	-725.40
Account Number And Title900-00-49000-000-000 - CITY CONTRIBUTION PAYMENTS							

VILLAGE OF PEWAUKEE

GL Detail

April 06, 2026 12:20 PM

End.GLPeriod 326 AND Start.GLPeriod 326

Date	Ref#	Journal	Description	Activity	Job	Debit	Credit
03/17/2026	100000004982-3	CR	CITY CONTRIBUTIONS- APRIL 2026 - CITY OF PEWAUKEE			.00	-74,205.50
Account Number And Title900-00-49000-000-000 - CITY CONTRIBUTION PAYMENTS						.00	-74,205.50
Account Number And Title900-00-49001-000-000 - VILLAGE CONTRIBUTION PAYMENTS							
03/01/2026	1-2	JE	LIBRARY CONTRIBUTION MARCH			.00	-22,369.42
Account Number And Title900-00-49001-000-000 - VILLAGE CONTRIBUTION PAYMENTS						.00	-22,369.42
Account Number And Title900-00-55110-000-110 - LIBRARY SALARIES & WAGES							
03/13/2026	13-1	PC	PAYROLL TRANS FOR 3/8/2026 PAY PERIOD			26,761.33	.00
03/27/2026	64-1	PC	PAYROLL TRANS FOR 3/22/2026 PAY PERIOD			27,594.04	.00
Account Number And Title900-00-55110-000-110 - LIBRARY SALARIES & WAGES						54,355.37	.00
Account Number And Title900-00-55110-000-130 - LIBRARY FRINGE BENEFITS							
03/13/2026	4-1	PB	PAYROLL TRANS FOR 3/8/2026 PAY PERIOD			3,371.49	.00
03/27/2026	23-1	PB	PAYROLL TRANS FOR 3/22/2026 PAY PERIOD			12,878.39	.00
Account Number And Title900-00-55110-000-130 - LIBRARY FRINGE BENEFITS						16,249.88	.00
Account Number And Title900-00-55110-000-141 - LIBRARY-PRINTED MATERIALS							
02/26/2026	34-1	AP	INGRAM LIBRARY SERVICES LLC			496.92	.00
03/01/2026	62-1	AP	CENTER POINT LARGE PRINT			51.54	.00
03/02/2026	35-1	AP	INGRAM LIBRARY SERVICES LLC			149.94	.00
03/02/2026	36-1	AP	INGRAM LIBRARY SERVICES LLC			196.20	.00
03/04/2026	37-1	AP	INGRAM LIBRARY SERVICES LLC			403.01	.00
03/06/2026	265-1	AP	INGRAM LIBRARY SERVICES LLC			393.78	.00
03/09/2026	266-1	AP	INGRAM LIBRARY SERVICES LLC			282.83	.00
03/10/2026	267-1	AP	INGRAM LIBRARY SERVICES LLC			490.31	.00
03/11/2026	268-1	AP	INGRAM LIBRARY SERVICES LLC			426.48	.00

VILLAGE OF PEWAUKEE

GL Detail

April 06, 2026 12:20 PM

End.GLPeriod 326 AND Start.GLPeriod 326

Date	Ref#	Journal	Description	Activity	Job	Debit	Credit
03/12/2026	269-1	AP	INGRAM LIBRARY SERVICES LLC			389.65	.00
03/12/2026	270-1	AP	INGRAM LIBRARY SERVICES LLC			179.75	.00
03/16/2026	271-1	AP	INGRAM LIBRARY SERVICES LLC			253.58	.00
03/18/2026	272-1	AP	INGRAM LIBRARY SERVICES LLC			356.86	.00
03/19/2026	273-1	AP	INGRAM LIBRARY SERVICES LLC			275.54	.00
03/20/2026	345-1	AP	INGRAM LIBRARY SERVICES LLC			181.36	.00
03/20/2026	346-1	AP	INGRAM LIBRARY SERVICES LLC			224.22	.00
03/23/2026	347-1	AP	INGRAM LIBRARY SERVICES LLC			260.96	.00
03/25/2026	373-1	AP	AMAZON CAPITAL SERVICES, INC.			15.99	.00
Account Number And Title900-00-55110-000-141 - LIBRARY-PRINTED MATERIALS						5,028.92	.00
Account Number And Title900-00-55110-000-142 - LIBRARY-NON-PRINT MATERIALS							
03/07/2026	279-1	AP	AMAZON CAPITAL SERVICES, INC.			184.54	.00
03/10/2026	291-1	AP	MIDWEST TAPE			76.47	.00
03/10/2026	292-1	AP	MIDWEST TAPE			32.24	.00
03/10/2026	293-1	AP	MIDWEST TAPE			26.99	.00
03/11/2026	371-1	AP	AMAZON CAPITAL SERVICES, INC.			39.89	.00
03/17/2026	294-1	AP	MIDWEST TAPE			23.24	.00
03/23/2026	383-1	AP	MIDWEST TAPE			58.47	.00
03/23/2026	384-1	AP	MIDWEST TAPE			25.49	.00
03/23/2026	385-1	AP	MIDWEST TAPE			24.74	.00
03/23/2026	386-1	AP	MIDWEST TAPE			17.24	.00
Account Number And Title900-00-55110-000-142 - LIBRARY-NON-PRINT MATERIALS						509.31	.00
Account Number And Title900-00-55110-000-144 - LIBRARY-MILEAGE, SUPPLIES, ETC							
03/02/2026	374-1	AP	WAUKESHA PUBLIC LIBRARY			31.19	.00

VILLAGE OF PEWAUKEE

GL Detail

April 06, 2026 12:20 PM

End.GLPeriod 326 AND Start.GLPeriod 326

Date	Ref#	Journal	Description	Activity	Job	Debit	Credit
03/02/2026	60-1	AP	AMAZON CAPITAL SERVICES, INC.			50.60	.00
03/05/2026	58-1	AP	AMAZON CAPITAL SERVICES, INC.			18.09	.00
03/06/2026	55-1	AP	AMAZON CAPITAL SERVICES, INC.			263.79	.00
03/25/2026	366-1	AP	AMAZON CAPITAL SERVICES, INC.			126.27	.00
03/26/2026	372-1	AP	AMAZON CAPITAL SERVICES, INC.			44.89	.00
03/26/2026	367-1	AP	AMAZON CAPITAL SERVICES, INC.			29.37	.00
Account Number And Title900-00-55110-000-144 - LIBRARY-MILEAGE, SUPPLIES, ETC						564.20	.00
Account Number And Title900-00-55110-000-150 - LIBRARY FISCAL AGENT/INS CHGS							
03/01/2026	2-1	JE	LIBRARY FISCAL AGENT FEE MARCH			1,590.50	.00
03/02/2026	50-1	AP	R & R INSURANCE SERVICES INC			1,097.37	.00
03/02/2026	53-1	AP	R & R INSURANCE SERVICES INC			214.66	.00
03/09/2026	154-1	AP	BAKER TILLY US, LLP			2,616.00	.00
Account Number And Title900-00-55110-000-150 - LIBRARY FISCAL AGENT/INS CHGS						5,518.53	.00
Account Number And Title900-00-55110-000-310 - LIBRARY-BUILDING MAINTENANCE							
03/01/2026	7-1	AP	JANI-KING OF MILWAUKEE			2,839.70	.00
03/03/2026	69-1	AP	BATZNER PEST CONTROL INC			124.18	.00
03/03/2026	327-1	AP	KEMPEN MASONRY LLC			555.00	.00
03/04/2026	56-1	AP	AMAZON CAPITAL SERVICES, INC.			165.29	.00
03/06/2026	281-1	AP	AMAZON CAPITAL SERVICES, INC.			86.48	.00
03/12/2026	290-1	AP	JF AHERN COMPANY			608.52	.00
03/19/2026	382-1	AP	MILWAUKEE PLUMBING & PIPING INC			434.00	.00
03/20/2026	370-1	AP	AMAZON CAPITAL SERVICES, INC.			55.76	.00
03/20/2026	328-1	AP	KEMPEN MASONRY LLC			1,797.50	.00
Account Number And Title900-00-55110-000-310 - LIBRARY-BUILDING MAINTENANCE						6,666.43	.00

VILLAGE OF PEWAUKEE

GL Detail

April 06, 2026 12:20 PM

End.GLPeriod 326 AND Start.GLPeriod 326

Date	Ref#	Journal	Description	Activity	Job	Debit	Credit
Account Number And Title 900-00-55110-000-311 - LIBRARY-UTILITIES							
03/06/2026	32-1	AP	ACH WE ENERGIES			4,565.92	.00
Account Number And Title 900-00-55110-000-311 - LIBRARY-UTILITIES						4,565.92	.00
Account Number And Title 900-00-55110-000-313 - LIBRARY-PROGRAMS							
03/02/2026	57-1	AP	AMAZON CAPITAL SERVICES, INC.			32.65	.00
03/02/2026	59-1	AP	AMAZON CAPITAL SERVICES, INC.			37.54	.00
03/02/2026	54-1	AP	AMAZON CAPITAL SERVICES, INC.			51.85	.00
03/03/2026	17-1	AP	V PRIVATE BAR SERVICES			150.00	.00
03/04/2026	280-1	AP	AMAZON CAPITAL SERVICES, INC.			.00	-56.49
03/06/2026	364-1	AP	WAUKESHA COUNTY HISTORICAL SOCIETY			175.00	.00
03/24/2026	368-1	AP	AMAZON CAPITAL SERVICES, INC.			24.37	.00
Account Number And Title 900-00-55110-000-313 - LIBRARY-PROGRAMS						471.41	-56.49
Account Number And Title 900-00-55110-000-450 - GRANT FUNDED EXPENSE							
03/03/2026	16-1	AP	V PRIVATE BAR SERVICES			200.00	.00
03/16/2026	18-1	AP	ERIC MANGES			300.00	.00
03/17/2026	365-1	AP	AMAZON CAPITAL SERVICES, INC.			226.19	.00
Account Number And Title 900-00-55110-000-450 - GRANT FUNDED EXPENSE						726.19	.00
Account Number And Title 900-00-55110-000-500 - DONATION FUNDED EXPENSE							
03/17/2026	369-1	AP	AMAZON CAPITAL SERVICES, INC.			198.02	.00
Account Number And Title 900-00-55110-000-500 - DONATION FUNDED EXPENSE						198.02	.00
Total:						347,599.28	-347,599.28

[APIInvoiceApprovalDepartment].DepartmentName library AND GeneralLedgerPeriod.GLPeriod 326

Vendor	Vendor Name	Invoice Number	Description	Invoice Amount	Invoice Date	Due Date	Batch	GL Period	Status
ACH WE ENERGIES									
Approved									
13090	ACH WE ENERGIES	5845759865	LIBRARY/21 0 MAIN ST	4565.92	03/06/2026	03/30/2026		326	Approved
Total ACH WE ENERGIES:				<u>4565.92</u>					
AMAZON CAPITAL SERVICES, INC.									
Approved									
23	AMAZON CAPITAL SERVICES, INC.	1MVR-XLVD-F3PJ	LIBRARY/J ANITORIAL SUPPLIES HAND SOAP	89.00	03/27/2026	04/24/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1G99-1DXD-HML1	LIBRARY/A DULT PROGRAM	7.55	03/27/2026	04/24/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1QCM-11TF-MH6G	LIBRARY/A DULT PROGRAM	126.88	03/26/2026	04/24/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	17XM-QTG4-NTVK	LIBRARY/O FFICE SUPPLIES	29.37	03/26/2026	04/24/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	16WC-JYQH-VDJ7	LIBRARY/O FFICE SUPPLIES	126.27	03/25/2026	04/24/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1VWY-1DT6-JV99	LIBRARY/A DULT FIC	15.99	03/25/2026	04/24/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1TWN-GTDL-KQJJ	LIBRARY/O FFICE SUPPLIES TONER	44.89	03/26/2026	04/24/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1CJM-QWND-77T9	LIBRARY/J UV PROGRAM	24.37	03/24/2026	04/24/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1PL7-WQQK-XWMN	LIBRARY/J ANITORIAL SUPPLIES	55.76	03/20/2026	04/17/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	11P9-LQLJ-1VRN	LIBRARY/D ELTA KAPPA	226.19	03/17/2026	04/17/2026		326	Approved

[APIInvoiceApprovalDepartment].DepartmentName library AND GeneralLedgerPeriod.GLPeriod 326

Vendor	Vendor Name	Invoice Number	Description	Invoice Amount	Invoice Date	Due Date	Batch	GL Period	Status
			GAMMA LITERACY GRANT						
23	AMAZON CAPITAL SERVICES, INC.	1G6D-C1GV-LWJ4	LIBRARY/FRIENDS/LOTT	198.02	03/17/2026	04/17/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1PLX-DXLT-GVYF	LIBRARY/JUV TONIES	39.89	03/11/2026	04/11/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1N3R-NVPV-XHDF	LIBRARY/JANITORIAL SUPPLIES	86.48	03/06/2026	04/05/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	14VC-J4GQ-DNFN	LIBRARY/JUV PROGRAM	-56.49	03/04/2026	04/02/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	14JF-C94C-D7LP	LIBRARY/JUV TONIES	184.54	03/07/2026	04/05/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1KGL-L1YR-W3MF	LIBRARY/OFFICE SUPPLIES	263.79	03/06/2026	04/05/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1L9Y-41L4-63M9	LIBRARY/OFFICE SUPPLIES	18.09	03/05/2026	04/05/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1KP6-Q9V4-9K3L	LIBRARY/JANITORIAL SUPPLIES	165.29	03/04/2026	04/02/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1PDQ-96MJ-9DY7	LIBRARY/OFFICE SUPPLIES	50.60	03/02/2026	04/02/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1MMW-FXLD-DXCF	LIBRARY/JUV CRAFTS	37.54	03/02/2026	04/02/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1DF9-QHT3-FJXD	LIBRARY/JUV PROGRAM	51.85	03/02/2026	04/02/2026		326	Approved
23	AMAZON CAPITAL SERVICES, INC.	1KYH-T3RT-FVYP	LIBRARY/JUV PROGRAM	32.65	03/02/2026	04/02/2026		326	Approved
Total AMAZON CAPITAL SERVICES, INC.:				1818.52					

BAKER TILLY US, LLP

[APIInvoiceApprovalDepartment].DepartmentName library AND GeneralLedgerPeriod.GLPeriod 326

Vendor	Vendor Name	Invoice Number	Description	Invoice Amount	Invoice Date	Due Date	Batch	GL Period	Status
Approved									
5733	BAKER TILLY US, LLP	BT3524676	LIBRARY/A UDIT 2025	2616.00	03/09/2026	04/03/2026		326	Approved
Total BAKER TILLY US, LLP:				<u>2616.00</u>					
BATZNER PEST CONTROL INC									
Approved									
7070	BATZNER PEST CONTROL INC	92881148	LIBRARY/P EST MGMT MAR 2026	124.18	03/03/2026	04/03/2026		326	Approved
Total BATZNER PEST CONTROL INC:				<u>124.18</u>					
CENTER POINT LARGE PRINT									
Approved									
3552	CENTER POINT LARGE PRINT	2229861	LIBRARY/L G PRINT BOOKS (2)	51.54	03/01/2026	04/01/2026		326	Approved
Total CENTER POINT LARGE PRINT:				<u>51.54</u>					
EBSCO PAYMENT PROCESSING CENTER									
Processing									
245	EBSCO PAYMENT PROCESSING CENTER	2603655	LIBRARY/S UBSCRIPTI ON CREDIT APPLIED	-34.49	03/13/2026	04/13/2026		326	Processing
Total EBSCO PAYMENT PROCESSING CENTER:				<u>-34.49</u>					
ERIC MANGES									
Approved									
13439	ERIC MANGES	03162026	LIBRARY/B RIDGES ADULT PROGRAM MING GRANT	300.00	03/16/2026	03/20/2026		326	Approved
Total ERIC MANGES:				<u>300.00</u>					

[APIInvoiceApprovalDepartment].DepartmentName library AND GeneralLedgerPeriod.GLPeriod 326

Vendor	Vendor Name	Invoice Number	Description	Invoice Amount	Invoice Date	Due Date	Batch	GL Period	Status
INGRAM LIBRARY SERVICES LLC									
Approved									
13350	INGRAM LIBRARY SERVICES LLC	95463843	LIBRARY/IN GRAM BOOKS	476.26	03/26/2026	04/24/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95434085	LIBRARY/IN GRAM BOOKS	276.36	03/25/2026	04/24/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95399103	LIBRARY/IN GRAM BOOKS	339.43	03/24/2026	04/24/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95361898	LIBRARY/IN GRAM BOOKS	260.96	03/23/2026	04/20/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95324857	LIBRARY/IN GRAM BOOKS	181.36	03/20/2026	04/20/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95341061	LIBRARY/IN GRAM BOOKS	224.22	03/20/2026	04/20/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95294493	LIBRARY/IN GRAM BOOKS	275.54	03/19/2026	04/16/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95264870	LIBRARY/IN GRAM BOOKS	356.86	03/18/2026	04/16/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95198005	LIBRARY/IN GRAM BOOKS	253.58	03/16/2026	04/16/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95135753	LIBRARY/IN GRAM BOOKS	179.75	03/12/2026	04/10/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95135752	LIBRARY/IN GRAM BOOKS	389.65	03/12/2026	04/10/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95103041	LIBRARY/IN GRAM BOOKS	426.48	03/11/2026	04/10/2026		326	Approved

[APIInvoiceApprovalDepartment].DepartmentName library AND GeneralLedgerPeriod.GLPeriod 326

Vendor	Vendor Name	Invoice Number	Description	Invoice Amount	Invoice Date	Due Date	Batch	GL Period	Status
13350	INGRAM LIBRARY SERVICES LLC	95069089	LIBRARY/IN GRAM BOOKS	490.31	03/10/2026	04/10/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	95047546	LIBRARY/IN GRAM BOOKS	282.83	03/09/2026	04/06/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	94995956	LIBRARY/IN GRAM BOOKS	393.78	03/06/2026	04/06/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	94869082	LIBRARY/IN GRAM BOOKS	196.20	03/02/2026	04/02/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	94931040	LIBRARY/IN GRAM BOOKS	403.01	03/04/2026	04/02/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	94855136	LIBRARY/IN GRAM BOOKS	149.94	03/02/2026	04/02/2026		326	Approved
13350	INGRAM LIBRARY SERVICES LLC	94781645	LIBRARY/IN GRAM BOOKS	496.92	02/26/2026	03/23/2026		326	Approved
Total INGRAM LIBRARY SERVICES LLC:				<u><u>6053.44</u></u>					
JANI-KING OF MILWAUKEE									
Approved									
12411	JANI-KING OF MILWAUKEE	MIL03260320	LIBRARY/J ANITORIAL SVC MAR 2026	2839.70	03/01/2026	04/01/2026		326	Approved
Total JANI-KING OF MILWAUKEE:				<u><u>2839.70</u></u>					
JF AHERN COMPANY									
Approved									
4875	JF AHERN COMPANY	804105	LIBRARY/FI RE SYSTEM PANEL BATTERIES	608.52	03/12/2026	04/12/2026		326	Approved
Total JF AHERN COMPANY:				<u><u>608.52</u></u>					

[APIInvoiceApprovalDepartment].DepartmentName library AND GeneralLedgerPeriod.GLPeriod 326

Vendor	Vendor Name	Invoice Number	Description	Invoice Amount	Invoice Date	Due Date	Batch	GL Period	Status
KEMPEN MASONRY LLC									
Approved									
9512	KEMPEN MASONRY LLC	8014	LIBRARY/S ALT-PLOW 3.16-3.18.26	1797.50	03/20/2026	04/20/2026		326	Approved
9512	KEMPEN MASONRY LLC	8012	LIBRARY/S ALT-PLOW 2.28.26 - 3.1.26	555.00	03/03/2026	04/03/2026		326	Approved
Total KEMPEN MASONRY LLC:				<u>2352.50</u>					
MIDWEST TAPE									
Approved									
548	MIDWEST TAPE	508614371	LIBRARY/1 ADULT DVD	17.24	03/23/2026	04/23/2026		326	Approved
548	MIDWEST TAPE	508614370	LIBRARY/1 ADULT DVD	24.74	03/23/2026	04/23/2026		326	Approved
548	MIDWEST TAPE	508614349	LIBRARY/1 ADULT DVD	25.49	03/23/2026	04/23/2026		326	Approved
548	MIDWEST TAPE	508614347	LIBRARY/3 ADULT DVD	58.47	03/23/2026	04/23/2026		326	Approved
548	MIDWEST TAPE	508589893	LIBRARY/1 ADULT DVD	23.24	03/17/2026	04/17/2026		326	Approved
548	MIDWEST TAPE	508552101	LIBRARY/1 ADULT DVD	26.99	03/10/2026	04/10/2026		326	Approved
548	MIDWEST TAPE	508551259	LIBRARY/1 ADULT DVD	32.24	03/10/2026	04/10/2026		326	Approved
548	MIDWEST TAPE	508551258	LIBRARY/3 ADULT DVD	76.47	03/10/2026	04/10/2026		326	Approved
Total MIDWEST TAPE:				<u>284.88</u>					
MILWAUKEE PLUMBING & PIPING INC									
Approved									
5391	MILWAUKEE PLUMBING & PIPING INC	63100	LIBRARY/P LUMBING INVESTIGA TE	434.00	03/19/2026	04/19/2026		326	Approved

[APIInvoiceApprovalDepartment].DepartmentName library AND GeneralLedgerPeriod.GLPeriod 326

Vendor	Vendor Name	Invoice Number	Description	Invoice Amount	Invoice Date	Due Date	Batch	GL Period	Status
Total MILWAUKEE PLUMBING & PIPING INC:				<u>434.00</u>					
V PRIVATE BAR SERVICES									
Approved									
13434	V PRIVATE BAR SERVICES	1124	LIBRARY/B EVERAGE SERVICE ADULT PROGRAM	150.00	03/03/2026	03/13/2026		326	Approved
13434	V PRIVATE BAR SERVICES	1124	LIBRARY/B EVERAGE SERVICE	200.00	03/03/2026	03/13/2026		326	Approved
Total V PRIVATE BAR SERVICES:				<u>350.00</u>					
WAUKESHA COUNTY HISTORICAL SOCIETY									
Approved									
13463	WAUKESHA COUNTY HISTORICAL SOCIETY	05282026	LIBRARY/W AUKESHA ON TAP - ADULT PROGRAM	175.00	03/06/2026	06/04/2026		326	Approved
Total WAUKESHA COUNTY HISTORICAL SOCIETY :				<u>175.00</u>					
WAUKESHA PUBLIC LIBRARY									
Approved									
2657	WAUKESHA PUBLIC LIBRARY	20260302BUS	LIBRARY/R EPLACEME NT REIMBURSE MENT	31.19	03/02/2026	04/02/2026		326	Approved
Total WAUKESHA PUBLIC LIBRARY:				<u>31.19</u>					
Total:				<u>22570.90</u>					

LOCAL GOVERNMENT INVESTMENT POOL

MONTHLY STATEMENT of ACCOUNTS

Department of Administration

March 2026

State of Wisconsin
P.O. Box 7871 - Madison WI 53707
Phone: 608.266.3711
Fax: 608.223.6578
Depositor No. 867171

PEWAUKEE, VILLAGE OF

235 HICKORY ST
PEWAUKEE, WI 53072-3533

01) GENERAL	\$10,585,258.24
02) CAP EXP & CONST PROJ	\$535,469.64
03) SEWER DEBT REPLACE	\$2,803,914.63
04) SEWER INVESTMENTS	\$1,293,499.44
05) WTR UTIL INVESTMENT	\$646,602.78
06) TIF RELATED HOLDING	\$168,185.66
07) LAIMON DONATION/LAKESIDE PARK	\$362,810.77
08) CEMETARY PERPETUAL	\$37,970.78
09) SEWER HOOKUP FEES	\$1,994,017.66
12) WATER HOOKUP FEES	\$288,469.19
16) LIBRARY	\$103,944.89

TOTAL **\$18,820,143.68**

Date	Type	Memo	Deposits	Withdrawals	Balance
Acct# 01	GENERAL			Beginning Balance	\$10,664,829.83
03/10/2026	Withdraw - State Payment	STFL invoice #22027		(\$114,373.12)	\$10,550,456.71
03/23/2026	Deposit - Direct Aids	REV LOTTERY CRE	\$1,659.60		\$10,552,116.31
03/31/2026	Interest	INT Mar 26 3.69%	\$33,141.93		\$10,585,258.24
	Account Total		\$34,801.53	(\$114,373.12)	\$10,585,258.24
Acct# 02	CAP EXP & CONST PROJ			Beginning Balance	\$533,798.17
03/31/2026	Interest	INT Mar 26 3.69%	\$1,671.47		\$535,469.64
	Account Total		\$1,671.47	\$0.00	\$535,469.64
Acct# 03	SEWER DEBT REPLACE			Beginning Balance	\$2,795,162.19
03/31/2026	Interest	INT Mar 26 3.69%	\$8,752.44		\$2,803,914.63
	Account Total		\$8,752.44	\$0.00	\$2,803,914.63
Acct# 04	SEWER INVESTMENTS			Beginning Balance	\$1,289,461.77
03/31/2026	Interest	INT Mar 26 3.69%	\$4,037.67		\$1,293,499.44
	Account Total		\$4,037.67	\$0.00	\$1,293,499.44
Acct# 05	WTR UTIL INVESTMENT			Beginning Balance	\$644,584.41
03/31/2026	Interest	INT Mar 26 3.69%	\$2,018.37		\$646,602.78
	Account Total		\$2,018.37	\$0.00	\$646,602.78
Acct# 06	TIF RELATED HOLDING			Beginning Balance	\$167,660.67
03/31/2026	Interest	INT Mar 26 3.69%	\$524.99		\$168,185.66
	Account Total		\$524.99	\$0.00	\$168,185.66
Acct# 07	LAIMON DONATION/LAKESIDE PARK			Beginning Balance	\$361,678.25
03/31/2026	Interest	INT Mar 26 3.69%	\$1,132.52		\$362,810.77
	Account Total		\$1,132.52	\$0.00	\$362,810.77
Acct# 08	CEMETARY PERPETUAL			Beginning Balance	\$37,852.25
03/31/2026	Interest	INT Mar 26 3.69%	\$118.53		\$37,970.78

	Account Total		\$118.53	\$0.00	\$37,970.78
Acct# 09	SEWER HOOKUP FEES			Beginning Balance	\$1,987,793.32
03/31/2026	Interest	INT Mar 26 3.69%	\$6,224.34		\$1,994,017.66
	Account Total		\$6,224.34	\$0.00	\$1,994,017.66
Acct# 12	WATER HOOKUP FEES			Beginning Balance	\$287,568.73
03/31/2026	Interest	INT Mar 26 3.69%	\$900.46		\$288,469.19
	Account Total		\$900.46	\$0.00	\$288,469.19
Acct# 16	LIBRARY			Beginning Balance	\$103,620.43
03/31/2026	Interest	INT Mar 26 3.69%	\$324.46		\$103,944.89
	Account Total		\$324.46	\$0.00	\$103,944.89

• There are no minimum or maximum dollar limits for deposits and withdrawals. However, to enhance investment performance for all LGIP participants, notify the LGIP Administrator, at least one day prior to the transaction date, of any deposits and/or withdrawals of \$10 million or more.

• There has been changes to your account security. The Local Government Investment Pool (LGIP) has a new security measure to protect your account. Your LGIP Account will be assigned a verification code to protect your account from unauthorized use. The verification code is used to validate your full user rights account access. To assist us in this new security measure, please make note of what your verification code is. For users with full user rights access, you can find your verification code on the LGIP website under your account settings. Please provide this verification code when calling LGIP. If you do not have online access, please contact the LGIP Administrator at lgip@wisconsin.gov.

• As a user of your LGIP account online, please ensure your user access is updated. If you would like to verify who has user access to your account, please email the administrator at LGIP@wisconsin.gov

Pewaukee Public Library - Monthly Statistics 2026

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Year to date	%
Circulation - ALL														
2024	27030	25093	27741	26423	24802	29343	33221	28671	24717	23933	23536	22784	317294	101.25%
2025	25546	23468	27323	25880	24601	30919	32449	28203	25483	26132	23069	23447	316520	99.76%
2026	26305	23907	27410	0	0	0	0	0	0	0	0	0	77622	101.68%
Circulation - Print and A/V														
2024	22224	20591	23043	21936	20181	24818	28559	24014	20107	19320	18971	18157	261921	98.81%
2025	20181	18557	21880	20813	19503	25807	27066	22708	20117	20485	17860	18017	252994	96.59%
2026	20150	18480	21359										59989	98.96%
Circulation - Digital														
Libby NON-PPL Titles 2025	4787	4418	4921	4557	4522	4587	4856	4977	4870	4944	4428	4604	56471	114.12%
Libby PPL Titles 2025	0	0	0	0	0	0	0	0	0	382	781	826	1989	
Hoopla Circulation	578	493	522	510	576	525	527	518	496	321	0	0	5066	102.14%
Total 2025	5365	4911	5443	5067	5098	5112	5383	5495	5366	5647	5209	5430	63526	118.14%
Libby NON-PPL Titles 2026	5254	4632	5245										15131	107.11%
Libby PPL Titles 2026	901	795	806										2502	#DIV/0!
Total 2026	6155	5427	6051	0	0	0	0	0	0	0	0	0	17633	112.18%
% of Circulation Digital														
2024	17.78%	17.94%	16.94%	16.98%	18.63%	15.42%	14.03%	16.24%	18.65%	19.27%	19.40%	20.31%	17.45%	
2025	21.00%	20.93%	19.92%	19.58%	20.72%	16.53%	16.59%	19.48%	21.06%	20.15%	19.19%	19.64%	19.44%	
2026	23.40%	22.70%	22.08%										22.72%	
Circulation Of PPL Owned Titles - Libby														
PPL Patrons 2026	901	795	806										2,502	
Other Bridges Libraries 2026	48	57	58										163	
Other Statewide Circ 2026	637	627	833										2,097	
Total Circulation	1,586	1,479	1,697										4,762	
CD Books vs. Eaudiobook Circulation														
CD Books 2026	221	188	246										655	
Eaudiobooks 2026	3183	4133	3200										10516	
% of Physical Circulation	6.94%	4.55%	7.69%										6.23%	
Library Visits														
Monthly total 2025	4500	4230	4735	4995	4034	6467	6392	4528	4230	4837	3925	3599	56472	121.94%
Daily average 2025	173	176	175	185	208	259	246	181	169	179	164	150	2353	
Monthly total 2026	4531	4531	4799										13861	102.94%
Daily average 2026	174	189	192										278	
Reference Transactions														
2025	590	559	580	564	493	1098	859	647	603	544	494	496	7527	96.55%
2026	699	572	715										1986	114.86%
New Library Cards Issued														
2025	114	81	113	115	94	169	133	97	98	80	56	50	1200	96.08%
2026	90	56	84										230	74.68%
Meetings Room Usage														
2025	58	68	61	80	56	62	68	44	65	67	73	40	742	117.78%
2026	61	63	74										198	105.88%

Pewaukee Public Library - Monthly Statistics 2026

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Year to date	%
Study Room Usage														
2025	153	182	157	154	151	149	45	130	119	100	128	106	1574	92.32%
2026	140	159	98										397	80.69%
Uses of Public Wireless Internet														
2025	348	4503	5121	5627	5219	4265	5247	4590	5323	6195	5709	6654	58801	477.51%
2026	3833	5344	4827										14004	140.43%
Use of Public Internet Computers														
2025	379	N/A	431	435	369	384	391	368	440	431	341	422	4391	90.09%
2026	453	395	439										1287	#VALUE!
Website Visits														
2025	15180	14268	14013	20555	15063	15180	19116	17165	13921	13631	16039	18381	192512	103.17%
2026	13322	10506	13113										36941	85.00%
Children's Programs (0-5)														
# programs 2025	8	14	11	17	6	15	19	1	12	17	13	5	138	103.76%
Attendance 2025	291	676	494	771	319	728	783	31	556	809	579	236	6273	100.50%
# programs 2026	14	16	14										44	200.00%
Attendance 2026	595	684	589										1868	193.17%
Children's Programs (6-11)														
# programs 2025	4	5	5	7	6	17	18	2	4	7	5	5	85	114.86%
Attendance 2025	86	144	126	271	849	1198	678	300	111	312	150	133	4358	122.66%
# programs 2026	7	9	6										22	157.14%
Attendance 2026	148	205	107										460	129.21%
Young Adult Programs (12-18)														
# programs 2025	2	2	3	3	4	1	4	0	3	2	3	2	29	111.54%
Attendance 2025	12	19	18	26	159	2	68	0	15	24	31	26	400	93.24%
# programs 2026	2	5	4										11	157.14%
Attendance 2026	11	23	24										58	118.37%
Adult Programs (19+)														
# programs 2025	6	9	12	13	13	10	9	11	12	9	13	5	122	96.83%
Attendance 2025	35	118	206	224	220	139	108	142	289	100	209	62	1852	90.65%
# programs 2026	9	9	9										27	100.00%
Attendance 2026	89	108	128										325	90.53%
General Interest Program														
# programs 2025	0	0	1	0	0	2	0	0	0	0	0	1	4	66.67%
Attendance 2025	0	0	120	0	0	404	0	0	0	0	0	32	556	80.58%
# programs 2026	0	0	1										1	100.00%
Attendance 2026	0	0	110										110	91.67%
Children's Self-Directed Activities (0-5) (includes summer reading participation)														
# programs 2025	0	0	0	0	0	0	2	1	0	0	0	0	3	300.00%
Attendance 2025	0	0	0	0	0	0	125	158	0	0	0	0	283	191.22%
# programs 2026	0	0											0	#DIV/0!
Attendance 2026	0	0											0	#DIV/0!

Pewaukee Public Library - Monthly Statistics 2026

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Year to date	%
Children's Self-Directed Activities (6-11) (includes summer reading participation)														
# programs 2025	0	1	1	2	1	0	0	2	0	0	0	1	8	100.00%
Attendance 2025	0	15	121	38	20	0	0	736	0	0	0	60	990	81.28%
# programs 2026	0	1	0										1	50.00%
Attendance 2026	0	12	0										12	8.82%
Young Adult Self-Directed Activities (12-18) (includes summer reading participation)														
# programs 2025	4	4	3	4	3	3	5	4	3	3	4	4	44	122.22%
Attendance 2025	104	144	95	110	92	284	241	399	106	168	97	118	1958	132.39%
# programs 2026	3	4	5										12	109.09%
Attendance 2026	110	94	173										377	109.91%
Adult Self-Directed Activities (19+) (includes summer reading participation)														
# programs 2025	2	4	4	0	0	0	0	1	0	0	0	1	12	92.31%
Attendance 2025	196	366	375	0	0	0	0	255	0	0	0	46	1238	90.70%
# programs 2026	3	5	5										13	130.00%
Attendance 2026	320	468	325										1113	118.78%
Other Self-Directed Activities (All Ages) (includes summer reading participation)														
# programs 2025	0	0	0	0	0	2	1	1	0	0	0	0	4	57.14%
Attendance 2025	0	0	0	0	0	357	165	52	0	0	0	0	574	53.20%
# programs 2026	1	1	1										3	#DIV/0!
Attendance 2026	74	93	130										297	#DIV/0!

Pewaukee Public Library
Director's Report
April 2026

Public Services Department (from Emma Kutchenreuter, Library Services Manager)

- In March, I attended the virtual Bridges Circulation meeting. The discussion included updates and reminders on circulation procedures to help the process of transferring items between libraries run more smoothly.
- I have been working through webinars available through the Wisconsin Department of Public Instruction that give guidance on how to handle difficult situations with patrons. I will continue to view these and incorporate what I've learned in both my patron interactions and in circulation staff training.
- We had a manual at the circulation desk with scripts for circ staff to use when encountering common patron questions and interactions. These scripts are meant to give circ staff a guide on how to handle patron questions accurately and quickly. It was a bit out of date, so I updated all the scripts and let staff know of the updates and changes. I also converted everything to electronic format, so the paper manual wasn't cluttering up the circ desk area.
- The machine that we use to clean damaged DVDs and CDs had a broken part. I was able to find an inexpensive part to replace the broken one, and with the help of our administrative assistant, a clerk, and a librarian, I was able to replace the part and get the machine up and running again.
- Finally, we have implemented a new system for ordering processing supplies so that it is more cost-effective and less time-consuming. One of our clerks has taken on the task of completing an inventory of all supplies and submitting an order to the administrative assistant on a regular basis. I was able to build a spreadsheet for her to use as a guide for what to order and when. So far, it has been working smoothly.

Thanks for everything you do!

Youth Services Department (from Peter Blenski, Youth Services Manager)

Pewaukee Kiwanis has been generous enough to fund our Summer Reading program again. The money will go to funding our summer performers, programs, and prize book giveaways. THANKS! It's so great that we can rely on their support.

Pewaukee Public Library Director's Report April 2026



Our summer reading program is shaping up well, we will have full details next time but most of our programming is 90% solidified. Nicole Mattke, the new school librarian for the district, will be working directly with us to allow school visits to promote the program, so it's great to continue that partnership. Our special Irish Dance program was a big hit for St. Patrick's Day. It's their third year in a row performing for us, so it's great that they can always bring out such a big audience.



My work on the 150th committee has started to pick up, so I've been helping promote events for the Village. And we are working on potentially having a special program with the police over summer. It's wonderful that we can help out the Village and work together!

**Pewaukee Public Library
Director's Report
April 2026**



**PEWAUKEE
MEMORIAL
WEEKEND**

SATURDAY, MAY 23

CEMETERY WALK

SELF-GUIDED TOUR THROUGH
FOREST HILL CEMETERY & ST. MARY'S CEMETERY
CELEBRATING OUR FALLEN HEROES
AND THE VILLAGE'S FOUNDING FIGURES

MONDAY, MAY 25

MEMORIAL DAY PARADE
STARTS AT 10 AM FOREST HILL CEMETERY
THRU DOWNTOWN, FINISHING AT BELL TOWER
MEMORIAL IN KIWANIS VILLAGE PARK
PRESENTED BY PEWAUKEE VFW AND AMERICAN LEGION

MEMORIAL DAY CAR SHOW
KIWANIS VILLAGE PARK 9:00-3:00 PM
FOOD AND DRINK FOR PURCHASE

Adult Services Department (from Madi Cooper, Adult Services Manager)

- **Memory Cafe:** This month the library hosted memory café. We had a traveling bar service come and teach people how to make mocktails. It was one of our better attended memory cafes which was great (and surprising) because the weather was awful. Feedback for the program was amazing and the mocktails were very yummy. The bar service did a great job with the program as well. I was very happy with the turnout
- **Fiction Shifting:** We are working on the very large project of shifting the fiction section again. We had some empty shelves after the last shift and we wanted to use those shelves again. The fiction section is getting quite tight due to our inability to weed anything because of library standards. Hopefully with this shift the shelves won't be so tight.
- **Technology and Computer Updates:** Four staff members received new laptops this year as they were all due for an update. Unfortunately, the laptops that we received did not work with our current docking set up. I worked with Taylor Computers and Dell to get a new docking option. Once the docks were received, I swapped out the technology at the 4 staff members desks as well as the public desks. I also worked with Taylor Computers to get the laptops set up and working for all 4 staff members. It ended up being a longer process than any of us expected, but everything is now working as it should.

Pewaukee Public Library Director's Report April 2026

- **Upcoming Mystery Party:** Due to the success of our mystery party back in October, we are hosting another one in April. I have spent the last month prepping for the event and I am looking forward to boogying the night away at the Disco mystery. Hopefully this one will be as successful as the last one because we would like to keep them going.
- **WIFI:** For the last couple months we were dealing with a WIFI problem where seemingly randomly people would stop being able to connect to our public WIFI. I worked with Ubiquiti (our WIFI providers) to try and figure out what the problem was. I did a lot of testing and setting changes in the admin site but was not able to find out where the problem was. Ubiquiti's response time was also incredibly slow so it was making troubleshooting take longer than we wanted. We ended up getting Taylor Computers involved who was able to find the problem much faster than Ubiquiti was and it seems that the problem has now been taken care of. I'm hopeful that the problem won't happen again.

Thanks for everything you do!

Administration (from Nan Champe, Library Director)

- *Meetings/Events attended:*
 - March 3: Village of Pewaukee Department Heads Meeting
 - March 10: Foundation Meeting
 - March 13: APL Meeting
 - March 16: Library Closed due to Snow Storm
 - March 18: Library Board Meeting
 - March 19: PPL Department Heads Meeting
 - March 24: Friends Meeting
 - March 25: ACT 150 Meeting
- *Building Updates*
 - *Envisionware Gates.* Emma and I have been working with Envisionware to improve the accuracy of our gate counts. An Envisionware technician logged in to review our settings and initially determined that the gate sensitivity needed to be increased. After making that adjustment, we conducted additional comparisons between actual counts and gate counts, but the discrepancy remained significant. Following further research, the technician consulted with the gate manufacturer and was advised that, for extra-wide gates, the sensitivity should be set to the highest level. This change has now been implemented. We are hopeful that, beginning in April, our gate totals will increase and more accurately reflect Library traffic.
 - *Internet Outage.* For several days, we were without Internet/WIFI service through our primary provider after AT&T installed new equipment at the Bridges offices, and the connection could not be easily restored. During this outage, Pewaukee was able to pivot to our Spectrum connection, which is typically used for telephone service. This additional connection proved invaluable. Pewaukee remained online while many other Bridges Libraries had no connectivity. For the future, we have configured the system so that the Spectrum connection will kick-in if the Wisnet connection is not working.

**Pewaukee Public Library
Director's Report
April 2026**

- *Parking Lot.* The winter took a significant toll on the parking lot, leaving several areas in poor condition. I have contracted with PLM to perform infrared repairs on the most damaged sections. The cost for these repairs will be \$2,980.00.
- *Roof Project Update.* I submitted written requests to both the City and the Village on March 20, 2026 for approval and funding of the roof replacement project. The City Council approved the project and its \$26,960 contribution at its meeting on Monday, April 6, 2026 contingent upon the Village's approval. The Village Board subsequently approved the project and its \$107,840 contribution at its meeting on Wednesday, April 8, 2026.
- *Foundation/Friends Update.* Both groups have agreed to pursue a merger to form a single charitable organization supporting the Library. They will continue working toward this goal and have agreed to engage an attorney to ensure all legal documentation and bylaws are thorough and comprehensive. I am confident that this reorganization will be a positive step, creating a more cohesive organization with improved marketing efforts and greater clarity around its role in supporting the Library.
- *2027 Adjacent County Funding Requests.* I have completed all of the Library's adjacent county funding requests for 2027. The Library is expected to receive \$3,312.75 from Washington, Dodge and Jefferson County, which represents a decrease of \$1,608.25 compared to our 2026 reimbursement.
- *Bridges Grant.* The Library's application for a \$3,000 grant from Bridges to support the website redesign has been approved. With this funding, the Library's share of the project cost will be \$12,000.00.
- *Library Standards and Act 150 Committee (AGENDA ITEM).* The Act 150 Committee met and reviewed feedback from libraries that did not approve the proposed standards. Based on this input, modifications were made. An attached memo outlines the specific changes, with revisions highlighted in yellow. The most significant update involves the FTE standard, which has been adjusted to remain consistent with the 2022–2026 plan. With these updates, the Library Board is asked to reconsider the proposed standards and provide its endorsement.
- *Surplus furniture (AGENDA ITEM).* Spring cleaning is underway, and as part of the lobby update, we need to decide whether to keep the display cases. Additionally, the bookcases in the Visaya Room have been sitting empty for as long as I can remember—if we don't plan to use them, should we consider removing them? Photos of all items have been included for reference.
- *Closed Session (AGENDA ITEM).* The confidential request will be sent to you as a separate document.



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 February 2026. Seven meetings were held during this planning process. Library input was solicited and received throughout the process and meetings were open to the public. History from previous Waukesha County Library Services planning processes can be found in Appendix A.

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

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

2027-2031 Plan Highlights

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

County Profile

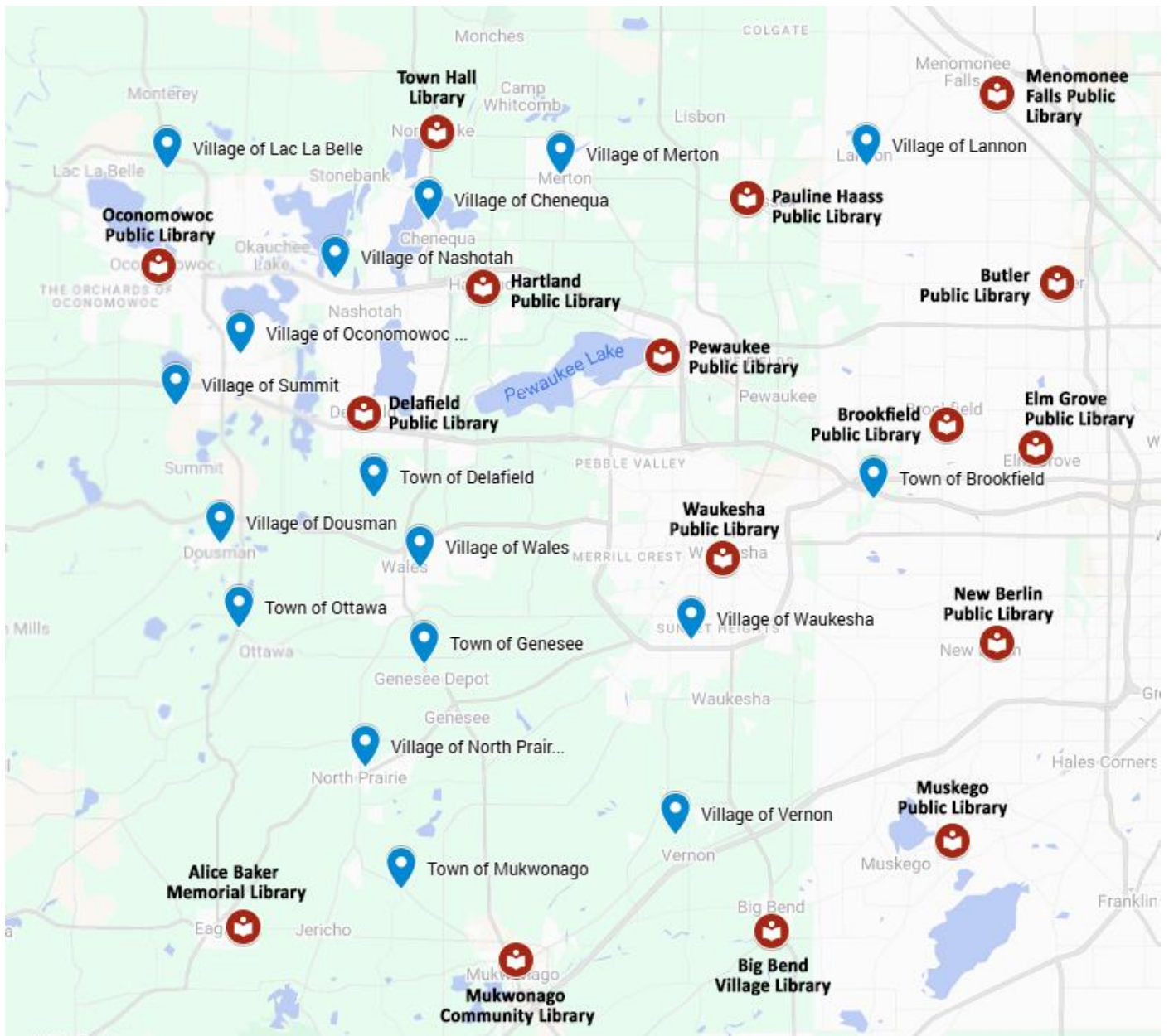
Understanding the trends in the population of Waukesha County provides the background for planning. The 2020 Census and 2023 American Community Survey from the U.S. Census estimates, as well as the State of Wisconsin Department of Administration (DOA) website showed following in Waukesha County:



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

County Library Services Profile

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

Figure 1. Waukesha County Libraries and TNR Communities



KEY	
TNR Community	
Municipal Library	

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

Figure 2. Waukesha County Libraries

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

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

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

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

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

Regional Public Library Systems

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

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

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

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

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

Public Library Data Comparative Analysis

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

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

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

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

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

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

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

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

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

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

Key Strategic Issues

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

Strategic Issue #1. County Funding Collection Formula

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

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

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

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

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

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

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

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

Allowable Costs Formula:

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

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

Figure 6. 2024 TNR Circulation Percentages for 2026 Budget

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Strategic Issue #2. County Funding Distribution Formula

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

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

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

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

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

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

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

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

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

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

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

Strategic Issue #3. Standards

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

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

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

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

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

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

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

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

Figure 8. LSER Target Ratios

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

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

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

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

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

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

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

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

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

Materials Expenditures Per Capita

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

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

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

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

Figure 10. Sample of Materials Per Capita Minimums to Exempt

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

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

Hours Open

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

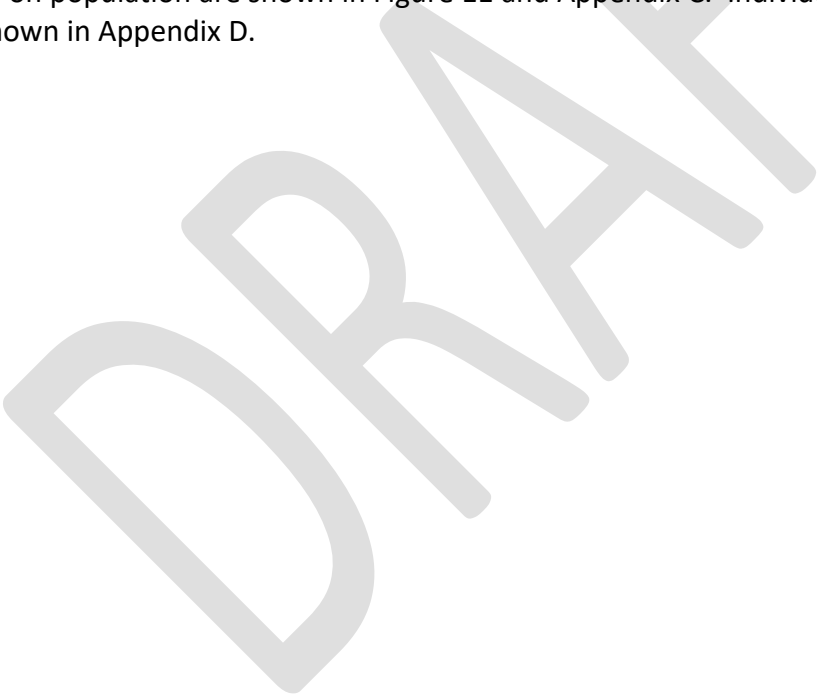


Figure 11: Winter Hours Open/Week Minimums

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

Full Time Staff Equivalent (FTE)

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

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

The current Committee reviewed the 2022-2026 FTE minimums. Having enough staff to handle daily operations was considered important to contributing to overall success for countywide library services. 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	Population	FTE Staffing Minimum Budget
1,000	2.00	17,500	11.62
2,000	2.00	18,000	11.74
3,000	3.00	18,500	11.86
4,000	4.00	19,000	11.98
5,000	5.00	19,500	12.10
6,000	6.00	20,000	12.22
7,000	7.00	20,500	12.34
8,000	8.00	21,000	12.47
9,000	9.00	21,500	12.59
10,000	10.00	22,000	12.75
10,500	10.10	22,500	12.85
11,000	10.20	23,000	12.98
11,500	10.31	23,500	13.11
12,000	10.41	24,000	13.24
12,500	10.51	24,500	13.38
13,000	10.62	25,000	13.51
13,500	10.73	25,500	13.64
14,000	10.84	26,000	13.77
14,500	10.94	26,500	13.90
15,000	11.05	27,000	14.03
15,500	11.17	27,500	14.16
16,000	11.28	28,000	14.30
16,500	11.39	28,500	14.44
17,000	11.51	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 1st, 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) and net crossover borrowing/lending circulations.

(b) Definitions. For purposes of this section:

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

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

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

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

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

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

Appendix C

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

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

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

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

Population	Materials Expenditures ³	Materials Exp. / Capita ³ Rate	Hours Open	FTE	Collection Size	Public Computers	Wi Fi
1,000	\$6,000	\$6.00	35	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 ³	Materials Exp. / Capita ³ 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 ³	Materials Exp. / Capita ³ 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 ³	Materials Exp. / Capita ³ 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 ³	Materials Exp. / Capita ³ 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

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

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

Appendix D

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

New 2027 Minimums for Individual Libraries

Library	Big Bend	2025 Population: 1,490
Category		2027 Minimum To Exempt
	\$ Materials/Capita	\$6.00/capita
	Hours Open	35
	FTE	2.00
	Collection Size	11,900
	Public Computers/Internet Access Devices	2
	Wireless Internet Access	Yes

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Appendix E

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

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

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

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

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

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

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

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

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

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

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

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

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

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

To: Waukesha County Library Boards
From: Brittany Larson, Bridges Library System Director
Date: April 7, 2026
Re: Proposed Library Standards for Waukesha County Library Board Endorsement Consideration

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

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

A public hearing was held on February 3rd. The first draft of standards within the plan proposed to the Waukesha County Library Boards was not endorsed by enough libraries that represented enough of the population per statute. The Committee met again in March to consider library board feedback provided on the standards. A common theme of concern in this feedback across many library boards was the FTE reduction. The Committee heard this feedback and restored the FTE back to the current values. A new five-year County Library Services Plan was endorsed by the Committee on April 6, 2026, after a second public hearing was held, moving the FTE standard back to its original level.

In summary, this endorsed Plan proposes a reduction to three of the numerical *Minimum to Exempt Standards* measures and maintaining the levels of three others. Each of these was reviewed carefully by the Committee. Table 1 below shows a summary of the recommended *Minimum to Exempt Standards*.

Table 1: Minimum to Exempt Standards Measures and Status

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

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

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

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

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

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

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

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

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

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

Waukesha County Library Standards Endorsement

Please fill out and return to the System office by April 23, 2026.

Endorsement: (Please check one)	<input type="checkbox"/> The library board DOES endorse the proposed standards <input type="checkbox"/> The library board DOES NOT endorse the proposed standards
Comments: (Please provide comments if a "no" endorsement is selected)	
Library	
Date	
Name of Board President	
Signature of Board President	
Name of Library Director	
Signature of Library Director	

Allowable Costs Worksheet for Waukesha County Libraries - in Bridges Library System

Instructions: Fill out the following financial information as they pertain to prior year actuals and the current year budget. For prior year actual information, please verify that all applicable information matches the reference fields certified in the annual report. For current year adopted budget information, please reflect the numbers adopted by your municipal entity, effective January 1.

Library Name:	Pewaukee			
Description	Annual Report Reference	2025 Actuals (Per Annual Report)	2026 Municipal Adopted Budget	Library Notes or Comments
Revenues				
Local Municipal Library Operating Revenue	Section V, 1 (for 2025) and Section V, 9 (for 2026)	\$1,132,020	\$1,158,899	
Home County Operating Revenue	Section V, 2(a)	\$110,349	\$129,179	
Other County Payments for Library Services	Section V, 2(b)	\$4,215	\$5,189	
State Funds (e.g. Innovation & Hoopla Grants)	Section V, 3	\$13,616	\$7,263	
Federal Funds	Section V, 4	\$0	\$0	
Contract Income	Section V, 5	\$0	\$0	
Funds Carried Forward for Operations	Section V, 6	\$11,817	\$39,021	
All Other Operating Income	Section V, 7	\$61,723	\$36,913	
Indirect Cost Funding (If applicable and if not already counted in Municipal Operating Revenue)	N/A - Field should match Indirect Cost field in Expenditures listed below			
Total Revenues		\$1,333,740	\$1,376,464	
Expenditures				
Operating Expenditures	Section VI, 6	\$1,333,740	\$1,376,464	
Indirect Costs (If applicable and if not already counted in another field)	N/A - Field should match Indirect Cost Funding in Revenues listed above			
Total Operating Expenditures		\$1,333,740	\$1,376,464	
Library Capital and Debt	Section VII (1 & 2)	\$6,957	\$190,000	
Total Expenditures		\$1,340,697	\$1,566,464	

The information listed above is a correct statement of the Library's spending for 2025 actuals and 2026 budget. Please provide any additional comments in the box below.

Board President

Date

Library Director

Date



107

MS

S
Y

QR code and text on a sign





Developing the Library Budget

The library budget is a tool for turning library dreams into reality. The budget determines the services that will be offered by your library and the resources devoted to each library program. A carefully developed budget will ensure that available funds are effectively utilized to realize your library's service objectives.

The Budget Development Process

The first step in developing a library budget is to look at what the library hopes to accomplish in the next year. The availability of a current strategic plan will make this step much easier, because the plan should already document your community's library service needs and the library activities necessary to meet those needs. So, at the point that the board wishes to begin planning the budget for the coming year, it should review the strategic plan and its chosen objectives, reflecting on the financial implications of the objectives for the coming year.

The second step is to determine the total financial resources necessary for what the library wants to accomplish in the coming year. Often, increased funding is necessary because of increased costs, increased usage, and/or new services that will be offered. Additional resources for new services can also be made available by shifting resources from a lower priority to a higher priority service.

Draft budget documents are prepared by the library director and library staff (following the format required by the municipality or county). (See attached [Sample Format of a Minimal Library Budget](#) for an example.) The library board and/or library board finance committee may have input into development of budget drafts. The board of trustees will then review the draft budget(s) with the director, propose changes, and finally approve a finished budget.

After the written budget documents are approved by the board and submitted to the municipality or county, the final step in the budget process is securing the funding needed to carry out the planned service program. Trustees, as volunteer public representatives, are especially effective budget advocates. Trustees should be involved in presenting, explaining, and supporting the library budget that was approved by the library board. (See also [Trustee Essential #13: Library Advocacy](#).)

The board may need to make budget changes if the funding needed to balance the budget is not secured. Budget changes may also be required during the budget year if, for example, certain expenditures are higher than expected, or costs are lower than expected.

Sources of Funding

One of the most important responsibilities for library trustees is determining the appropriate level of funding for the library and working to secure that funding.

8

In This Trustee Essential

- Goals of budgeting
- Steps in the budget development process
- Sources of library funding
- Budget terminology

Public library service in Wisconsin is provided through cooperative efforts at the state, public library system, and county and local level. The bulk of the funding for most Wisconsin public libraries is provided by the municipality or county that established the library.

Counties must reimburse libraries within the county or in an adjacent county for at least 70% of the cost of service to county residents who do not live in a library municipality. Payment requests must be submitted by July 1. Requests should be submitted to the county clerk, but some library system or county library services coordinate the requests. Municipalities can exempt themselves from the county library tax if they tax themselves for library service at a higher tax levy rate than the county.

Fines may be a source of library revenue, but the policy of charging fines is the subject of debate concerning their effectiveness in encouraging the return of materials, and concerning their public relations effects. In establishing a fine policy, a library board should consider not only the possible revenue but also the potential negative public relations effects.

Under Wisconsin law, public libraries may not charge fees for information-providing services. Fees and charges for such things as making computer printouts and using a copy machine are legal. Most fees, charges, and sales by public libraries are subject to the Wisconsin sales tax and any county and special sales taxes. For details, see <http://dpi.wi.gov/pld/boards-directors/administration/faq-pt5#sales-tax>.

Grants and gifts can be an excellent source of supplementary funds for special projects. In addition, community citizens are often willing to make significant donations to cover part or all of the costs of a new or remodeled library building.

Grants or donations should never be used to justify reducing or replacing the community's commitment to public funding. Donors will quit donating, volunteers will quit working, and granting organizations will quit awarding grants to your library if they see that their efforts are resulting in reduced public funding for the library instead of improved service. (See also *Trustee Essential #24: Library Friends and Library Foundations*.)

Desirable Budget Characteristics

There are four practical characteristics that your budget document should include.

1. Clarity: The budget presentation should be clear enough so every board member, every employee, and every municipal governing body member can understand what is being represented.
2. Accuracy: Budget documentation must support the validity of budget figures, and figures must be transcribed and reported carefully, without variation from the documentation.
3. Consistency: Budget presentations should retain the same format from period to period so that comparisons can be easily made. All budgets are comparative devices, used to show how what is being done now compares with what happened in the past and what is projected to happen in the future.

4. **Comprehensiveness:** Budget reports should include as complete a picture of fiscal activities as is possible. The only way to know the true cost of the library operation is to be certain that all revenue and expenditure categories are included within the budget.

Terms and Distinctions

Line item and program budgets

These are two of the most popular styles of budgets. The line item budget is organized around categories or lines of expenditures, and shows how much is spent on the various products and services that the library acquires. The program budget, designed to assist with planning, is organized around service programs (such as children's services, young adult services, reference services) and helps the library board and director see how much is spent on these individual areas. A program budget is usually sub-arranged in a line item style, so that the individual categories of expenditures for each program are also presented.

Operating vs. capital costs

In planning for the financial needs of the library and recording financial activities, it is important to keep operating and capital activities separated for reporting purposes. Operating activities are those that recur regularly and can be anticipated from year to year. Included as operating expenditures are staff salaries and benefits; books and other media acquired for the library; heating, cooling, and regular cleaning and maintenance of the building; and technology support contracts. Capital activities, in contrast, are those that occur irregularly and usually require special fundraising efforts. These would include new or remodeled library buildings, major upgrades of technology, and usually the purchase of computer hardware. You should present the operating and capital activities separately within your library budget. (See attached *Sample Library Budget* for an example.)

Income vs. expenditures

In both operating and capital budgets, you will need to show income (or revenues) and expenditures. Income should be broken down by the source of the funding—for instance, municipal appropriation, county reimbursement, system state aid, grant projects, gifts and donations, fines and fees. Expenditures are shown in categories (or lines) representing similar kinds of products or services—for instance, wages, benefits, print materials, audio and video materials, telecommunications, staff and board continuing education.

Municipal accounting vs. library accounting

As specified in state law, library boards must deposit most of their funds with their municipality. Since the municipality holds the funds, it will also keep records of how those funds are used. This municipal accounting should be available to the library board upon request. However, even though your city, village, or county is performing this accounting function, it is advisable for the library to also maintain its own set of records. This will allow the board and director to know the status of finances in a timely manner (if there is a delay in getting figures from the municipality) and to have a check to assure that the municipality is not inadvertently confusing transactions and balances. In addition, there are types of funds (gifts, bequests, devises, and endowments) which can be managed directly by the library board; if the board chooses to manage these funds it must, of course, keep records for accountability. (See also [Trustee Essential #9: Managing the Library's Money](#).)

Discussion Questions

1. What factors will contribute to the size of the appropriation the library board will request from the municipality?
2. What should a trustee's role be in presenting the request for funding from the municipality?
3. How does the library's strategic plan affect budget decisions?
4. In your library, how formal is the pursuit of gifts and donations, and how are these funds most often used?

Sources of Additional Information

- Sample Format of a Minimal Library Budget (attached)
- Your regional library system staff (See [Trustee Tool B: Library System Map and Contact Information](#).)
- [Wisconsin Public Library Standards](#)
- [Wisconsin Public Library Service Data](#)

Trustee Essentials: A Handbook for Wisconsin Public Library Trustees was prepared by the DLT with the assistance of the Trustee Handbook Revision Task Force.

© 2002, 2012, 2015, 2016
Wisconsin Department
of Public Instruction.
Duplication and distribution for not-for-profit purposes are permitted with this copyright notice. This publication is also available online at <http://dpi.wi.gov/pld/boards-directors/trustee-essentials-handbook>

Sample Format of a Minimal Library Budget

Note: This simplified budget roughly corresponds to the *Wisconsin Public Library Standards* 2011 minimum operating budget of \$67,000. Actual amounts will vary depending on local needs.

Operating Income	2011 Actual	2012 Budget	2013 Budget
Municipality	\$ 47,500	\$ 48,200	\$ 48,925
County	\$ 13,400	\$ 13,600	\$ 13,800
State / library system	\$ 1,340	\$ 1,360	\$ 1,380
Federal (LSTA)	\$ 1,340	\$ 1,360	\$ 1,380
Funds carried forward	\$ 700	\$ 700	\$ 700
Fines	\$ 1,200	\$ 1,225	\$ 1,240
Donations	\$ 700	\$ 700	\$ 700
Fees/other*	\$ 150	\$ 175	\$ 175
Transfer from gift fund	\$ 670	\$ 680	\$ 700
Operating Income Total	\$ 67,000	\$ 68,000	\$ 69,000

Operating Expenditures	2011 Actual	2012 Budget	2013 Budget
Salaries and wages	\$ 30,820	\$ 31,280	\$ 31,740
Employee benefits	\$ 9,380	\$ 9,520	\$ 9,660
Books	\$ 9,000	\$ 9,110	\$ 9,250
Periodicals (including electronic)	\$ 1,800	\$ 1,880	\$ 1,930
Video materials	\$ 1,440	\$ 1,460	\$ 1,480
Audio materials	\$ 600	\$ 610	\$ 620
Software and other electronic materials	\$ 670	\$ 680	\$ 690
Contracted services	\$ 1,340	\$ 1,360	\$ 1,380
Staff and board continuing education	\$ 1,340	\$ 1,360	\$ 1,380
Public programming	\$ 670	\$ 680	\$ 690
Telecommunications	\$ 2,010	\$ 2,040	\$ 2,070
Utilities	\$ 5,250	\$ 5,300	\$ 5,350
Equipment repair	\$ 670	\$ 680	\$ 690
Supplies	\$ 2,010	\$ 2,040	\$ 2,070
Operating Expenditures Total	\$ 67,000	\$ 68,000	\$ 69,000

Capital Income	2011 Actual	2012 Budget	2013 Budget
Municipality	\$ 2,000	\$ 3,000	\$ 3,000

Capital Expenditures	2011 Actual	2012 Budget	2013 Budget
Computer equipment replacement	\$ 2,000	\$ 2,000	\$ 2,000
New shelving		\$ 1,000	\$ 1,000
Capital Expenditures Total	\$ 2,000	\$ 3,000	\$ 3,000

Total of All Expenditures	\$ 69,000	\$ 71,000	\$ 72,000
----------------------------------	------------------	------------------	------------------

*State law requires that all information-providing public library services be provided free of charge. (See [Trustee Essential #8: Developing the Library Budget](#) for details.)