

LIBRARY BOARD MEETING  
 Tuesday August 27, 2024, 6:30pm  
 Location: 2<sup>nd</sup> Floor Program Room  
 Rescheduled to Wed 9/4/24, 6:30pm



STREAM VIA ZOOM

<https://us02web.zoom.us/j/85986735998?pwd=SS9MRkJKOVBRcE0rRTN5VEtBOGZpQT09>

Meeting ID: 859 8673 5998

Passcode: Fk1S8kwf

Board of Trustees	Attended
<i>Name, Position Title, Year Board Term Expires</i>	
1. Sarah Leinweber, President, 2017-2026	
2. Erin Jelenchick, Vice President, 2020-2027	
3. Sam Dettmann, Village Board Representative, 2024-2025	
4. Nathan Christenson, School District Representative, 2021-2024	
5. Ellie Gettinger, Member, 2019-2025	
6. Claire Flannery, Member, 2020-2026	
7. Nikki DeGuire, Member, 2024-2027	
<b>Staff</b>	
Nyama Reed, Library Director	
Scott Lenski, Head of Adult Services	
<b>Guests</b>	
Steve Heser, MCFLS Executive Director	

CALL TO ORDER					
6:30	1. Statement of Public Notice				
6:31	2. Public Comment – limit to five minutes; the Board cannot discuss or act on any issue that is not duly noticed on the agenda.				
	Item	Action Desired	1st	2nd	Pass
6:33	3. Consent Agenda - Upon request of any Trustee, any item may be removed from the Consent Agenda for separate consideration under General Business. a. Minutes of July 30, 2024 meeting b. Finance Report Through July 31, 2024 c. Department Reports d. Monthly Statistics e. Director's Report	Motion			
6:35	4. 2025-2028 MCFLS Agreements with Steve Heser, MCFLS Director	Motion			
7:05	5. <del>Adult Services Presentation by Scott Lenski, Head of Adult Services</del>	Discuss			
7:30	6. Naming Policy Review (Flannery)	Motion			
8:00	7. "Faves for Fines" (Reed)	Motion			
8:10	8. Library IQ for Strategic Collection Analysis and Development (Reed)	Motion			
8:30	ADJOURNMENT	Motion			

#### BOARD MEETINGS

- Sep 4, 2024, Tuesday, 6:00-7:00 pm – Foundation Executive Board, @Library
- Sep 9, 2024, Monday, 6:00-7:00 pm – Foundation Board, @Library
- Sep 16, 2024, Monday, 6:00-8:30 pm - Village of WFB Board of Trustees, @Village Hall
- Sep 18, 2024, Wednesday, 6:00-7:30 pm - Friends of the Library Board of Directors, @Library
- Sep 19, 2024, Thursday, 5:00-7:00 pm – MCFLS Board of Trustees, @West Allis Library
- Sep 24, 2024 Tuesday, 6:30-8:30 pm - Library Board of Trustees, @Library





Board of Trustees	Attended
<i>Name, Position Title, Year Board Term Expires</i>	
Sarah Leinweber, President, 2017-2026	In-person
Erin Jelenchick, Vice President, 2020-2024	Absent
Sam Dettman, Village Board Representative, 2024-2025	In-person
Nathan Christenson, School District Representative, 2024-2025	In-person
Ellie Gettinger, Member, 2019-2025	In-person
Claire Flannery, Member, 2020-2026	In-person
Nikki DeGuire, Member, 2024-2027	In-person
<b>Staff</b>	
Nyama Reed, Library Director	In-Person

<b>CALL TO ORDER 6:35pm</b>				
1. Statement of Public Notice				
2. Public Comment – limit to five minutes; the Board cannot discuss or act on any issue that is not duly noticed on the agenda.				
Item	Action Desired	1st	2nd	Pass
3. Consent Agenda - Upon request of any Trustee, any item may be removed from the Consent Agenda for separate consideration under General Business. a. Minutes of June 25, 2024 meeting b. Finance Report Through June 30, 2024 c. Department Reports d. Monthly Statistics	Motion	Christenson	DeGuire	Unanimous
Motion to approve Consent Agenda				
4. 2025 Budget: Review Revised Draft	Motion	Gettinger	Christenson	Unanimous
Director Reed presented an updated draft for the 2025 operating budget based on the Board discussion at the June 2024 meeting				
Motion to approve the Library's 2025 operating budget, except for wage increases, insurance rates, and village tax allocation.				
5. Naming Policy Review	Motion	n/a	n/a	
Discussion ensued regarding naming policy, including the difference between policy and guidelines. Discussion included: listing individuals and organizations rather than only a single individual; flexibility of wording on signage rather than one specified wording option; mention of when naming will occur based on negotiated agreement (ex. only after pledge paid in full or after first payment of 3 year payment received).				
No action taken. Trustee Flannery will bring updated draft to August meeting.				
6. Library IQ for Strategic Collection Analysis and Development	Motion	n/a	n/a	
The discussion highlighted the advantages of Library IQ. Trustee Christenson inquired about the criteria for measuring success. Other Board questions included: How many users can log in simultaneously? Who are the national benchmark users comparable to WFB? What percentage of libraries renew after the initial year? Is there room to negotiate a lower price? What happens to our data if we decide not to renew? On what metrics is the pricing based?				
No decision was made. The Board directed Director Reed to seek answers to these questions and to revisit the topic at the August meeting.				
7. Director's Report	Discuss			
Director Reed presented info in packet memo.				
Director Reed discussed her monthly report as presented in packet memo.				
<b>ADJOURNMENT 8:36pm</b>	Motion	Christenson	Gettinger	Unanimous



GL NUMBER	DESCRIPTION	END BALANCE 12/31/2023	2024 ORIGINAL	YTD BALANCE 07/31/2024	AVAILABLE BALANCE	% BDGT	NOTES
			YTD: 58%	Above Target: 69%+	On Target: 48-68%	Under Target: 47%-	
13-00000-41100	Property Taxes	901,360	900,526	-	900,526	-	Ok
13-00000-43792	Other Grants	1,502	-	2,300	(2,300)	n/a	2023 Grant Disbursed Jan 2024
13-00000-43793	Library MCFLS RB Payment	13,869	57,179	57,191	(12)	100	
13-00000-45209	LIBRARY FINES	23,415	25,000	15,897	9,103	64	
13-00000-45210	Library Replacement Cards	208	150	51	99	34	
13-00000-45224	LIBRARY DAMAGE RECOVERY	(9)	-	(12)	12	n/a	
13-00000-46712	LIBRARY ROOM RENT	4,680	4,500	2,878	1,622	64	
13-00000-46713	LIBRARY COPY AND FAX FEES	5,291	4,000	3,575	425	89	
13-00000-46715	MISCELLANEOUS REVENUE	2,068	-	691	(691)	n/a	Foundation Payment to balance 13-93200-50428
13-00000-48501	LIBRARY DONATIONS	1,438	2,000	1,910	90	96	
13-00000-48504	Restricted Donation	104,200	-	-	-	n/a	
Total Revenue:		1,058,021	993,355	84,481	908,874	9	Ok
GL NUMBER	DESCRIPTION	END BALANCE 12/31/2023	2024 ORIGINAL	YTD BALANCE 07/31/2024	AVAILABLE BALANCE	% BDGT	NOTES
			YTD: 58%	Above Target: 69%+	On Target: 48-68%	Under Target: 47%-	
13-93000-50100	Salaries	571,806	599,350	338,507	305,046	56	Ok
13-93000-50150	FICA Tax	43,047	45,850	25,647	23,552	56	
13-93000-50160	Health/Dental Insurance Premium	58,474	57,010	33,261	28,500	58	
13-93000-50161	Health Insurance Deductible (Direct Pay)	588	1,450	1,633	(120)	113	NYR 2023 Charged to 2024
13-93000-50170	Retirement Contribution - ER portion	29,303	30,489	17,610	15,190	58	
13-93000-50180	Group Life Insurance Premium	1,271	1,284	811	611	63	
13-93000-50181	Disability Insurance Premium	-	1,284	-	1,284	-	
13-93200-50190	Training/Meetings/Travel	8,292	4,500	532	3,968	-	Mostly used in Fall
13-93200-50191	Membership Dues	997	1,200	1,046	154	87	Most paid in Q1
13-93200-50194	Personnel Related Expenses	489	700	68	682	10	
13-93200-50250	Utilities	46,057	48,000	27,198	25,502	57	Projected \$53,000
13-93200-50251	Telephone/Internet	5,792	5,700	2,959	3,653	52	Projected \$5,900
13-93200-50300	Office Supplies	1,619	2,000	510	1,535	26	
13-93200-50301	Printing/Publishing/Copies	491	500	265	235	53	Ok (Bookmarks)
13-93200-50302	Postage	16	25	2	23	7	
13-93200-50303	Covid Supplies	375	250	-	250	-	
13-93200-50360	Building Maintenance	9,948	12,000	19,272	(6,897)	161	Storytime Room Project, funded by Restricted Donations
13-93200-50428	Library Director Designated			50,822	(50,822)	n/a	Transfer to Foundation Fund + Foundation Supplies
13-93200-50760	Sales Tax	256	250	201	82	80	
13-93300-50240	IT Support Contract Services	18,667	25,000	7,448	19,286	30	
13-93300-50311	Copier Maintenance/Repair	2,970	3,200	1,646	1,866	51	3



13-93300-50312	Material Processing/Repairs	3,480	3,400	2,209	1,653	65	
13-93300-50350	Maintenance Service & Supplies	33,960	34,050	14,500	19,550	43	
13-93300-50351	Custodial Supplies	4,144	5,000	1,619	2,982	32	
13-93300-50400	MCFLS Supplies	1,565	1,200	731	469	61	Stocked up at start of year
13-93400-50401	MCFLS Membership	21,423	18,413	15,544	2,869	84	Pay total at start of year
13-93400-50402	Programs - Adult	588	500	-	500	-	
13-93400-50403	Programs - Children	317	500	402	172	80	
13-93400-50415	Programs - Young Adults	-	250	-	250	-	
13-93500-50410	Library Collection Materials	80,000	90,000	58,811	38,167	65	
	Fund 22	23,401	20,000	-	20,000	-	
	Total Collections	103,401	110,000	58,811	58,167	53	Ok
13-93500-50413	Adult DVD's	169	-	-	-		
Total Expenditure:		945,936	993,355	623,252	440,192	63	Ok
Fund 13 - Library Special Revenue Fund:							
TOTAL REVENUES		1,058,021	993,355	84,481	908,874	9	Ok
TOTAL EXPENDITURES		946,104	993,355	623,252	370,103	63	Ok
NET OF REVENUES & EXPENDITURES		111,917	-				
BEG. FUND BALANCE		47,293	159,209				
END FUND BALANCE		159,209	159,209				
GL NUMBER	DESCRIPTION	END BALANCE 12/31/2023	2024 ORIGINAL	YTD BALANCE 07/31/2024	AVAILABLE BALANCE		NOTES
TOTAL REVENUES		20,532	-	7,500			
TOTAL EXPENDITURES		23,401	20,000	-	20,000		\$20,000 approved for 2024
NET OF REVENUES & EXPENDITURES		(2,869)	(20,000)	7,500			
BEG. FUND BALANCE		76,857	73,988	73,988			
END FUND BALANCE		73,988	53,988	81,488			
GL NUMBER	DESCRIPTION	END BALANCE 12/31/2023	2024 ORIGINAL	YTD BALANCE 07/31/2024			
01-55500-50350-1001	Maintenance Services (Contracts)	25,986	n/a	12,224			
01-55500-50360-1001	Building Maintenance (Repairs)	33,094	n/a	22,080			



To: Whitefish Bay Public Library Board of Trustees  
 From: Nyama Y. Reed, Library Director  
 Date: August 27, 2024 Meeting  
 Re: Department Reports



## Adult Services (Lenski)

### **Programs**

We are taking a little break from special programs for the summer, as summer can be difficult to compete with local festivals, vacations, camps and other things, especially for the adults. Our two book clubs are going strong. Mystery Book Club, run by part-time librarian Sharon Nagel, averages between 6-8 people each month. She offers the book club in a hybrid format, and she always has both in person and online attendees. Nyama continues to offer the Tea Time Book Club, and regularly has around 10+ people monthly. This program is offered as a hybrid as well, but some months there are only in person attendees, while some months have both. We've gotten feedback that folks like the hybrid option and it's been a nice alternative for folks who maybe can't make a meeting due to illness or weather.

### **Collection Development**

Shifting in the nonfiction collection continues as we make our way from the end of the collection (999) to the start (000). We currently are at the 600s (having started at the 900s) and I anticipate that this will take us until end of year. As we continue we are looking at absorbing our foreign language learning collection, which currently is shelved in a separate area. It's always been difficult for patrons to find these so the goal is to have enough room so that we can place it in the 400s where it falls within the Dewey classification.

### **New Collection Alert**

The library has started circulating a new collection - Binge Boxes. Binge Boxes are a collection of DVDs that have a common theme such as all the movies in a series (think Star Wars, Hunger Games), movies directed by a famous director like the Coen Brothers, or starring a specific actor such as Denzel Washington. So far the collection contains about 20 Binge Boxes, and these can be placed on hold and requested and sent to other libraries. There are currently 2 other libraries in the MCFLS consortium that circulate a similar collection.

## Youth Services (Kiekhaefer)

### **Summer Reading Program**

- Summer Reading will be wrapping up next week.
- Our sign up numbers are very similar to last year's numbers, but we had a slight increase in completions. That tells me more of our participants were engaged this year.
  - I was not able to do a SRP presentation at Richards this year, so that might have impacted our sign-up numbers.
- Our teen numbers were higher across the board, which was exciting to see. I was able to talk with all of the 6<sup>th</sup> graders at WFBMS so I think that had an impact.

1	SRP (Paper Logs!)	2024					
2			Registered	Completed Level 1	Completed Level 2		
3	Kids (birth-PreK)		205	96	57		
4	Kids (K5-entering 6th)		747	531	343		
5			952	627	400		
6	Teens (7th-12)		Registered	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4
7			124	59	52	49	49
8							
9	SRP (Paper Logs!)	2023					
10			Registered	Completed Level 1	Completed Level 2		
11	Kids (birth-PreK)		193	82	38		
12	Kids (K5-entering 6th)		791	521	309		
13			984	603	347		
14	Teens (7th-12)		Registered	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4
15			111	42	42	33	32

### **Meetings and Trainings**

- I met with my mentee for the WLA Mentorship program.
- We hosted 50 K4 and K5 kids from the Richard K-Camp, the summer day camp through the WFB Rec Department. As part of their visit with us, they had a storytime with Heidi, some time for browsing and enjoying the library, a block building challenge, and two crafts.
- I also visited the K Camp for a storytime that same week.



TRANSACTIONS FROM 07/01/2024 TO 07/31/2024

Date	JNL	Type	Description	Reference #	Debits	Credits	Balance
Fund 13 Library Special Revenue Fund							
07/01/2024			<b>13-00000-11100 CASH IN BANK</b>		BEG. BALANCE		(300,935.87)
07/03/2024	CD	CHK	SUMMARY CD 07/03/2024			5,638.75	(306,574.62)
07/05/2024	CR	RCPT	Daily Library Receipts	218392	766.31		(305,808.31)
07/06/2024	GJ	JE	Quarterly utility payments	5597		981.64	(306,789.95)
07/09/2024	GJ	JE	Monthly Sales Tax ACH Payment	5594		32.34	(306,822.29)
07/10/2024	CD	CHK	SUMMARY CD 07/10/2024			2,110.94	(308,933.23)
07/12/2024	PR	CHK	SUMMARY PR 07/12/2024			23,594.39	(332,527.62)
07/12/2024	CD	CHK	SUMMARY CD 07/12/2024			2,175.20	(334,702.82)
07/12/2024	CR	RCPT	Daily Library Receipts	219339	459.92		(334,242.90)
07/19/2024	CD	CHK	SUMMARY CD 07/19/2024			3,718.11	(337,961.01)
07/22/2024	CR	RCPT	Daily Library Receipts	220589	587.74		(337,373.27)
07/25/2024	CD	CHK	SUMMARY CD 07/25/2024			4,313.09	(341,686.36)
07/26/2024	PR	CHK	SUMMARY PR 07/26/2024			24,769.87	(366,456.23)
07/28/2024	CR	RCPT	Daily Library Receipts	220817	4,362.15		(362,094.08)
07/30/2024	CR	RCPT	Daily Library Receipts	220902	76.35		(362,017.73)
07/31/2024	GJ	JE	Monthly WRS ACH Payment	5608		2,328.93	(364,346.66)
07/31/2024			13-00000-11100	END BALANCE	6,252.47	69,663.26	(364,346.66)
07/01/2024			<b>13-00000-12100 TAXES RECEIVABLE</b>		BEG. BALANCE		900,526.00
07/31/2024			13-00000-12100	END BALANCE	0.00	0.00	900,526.00
07/01/2024			<b>13-00000-21100 ACCOUNTS PAYABLE</b>		BEG. BALANCE		0.00
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	40023382 6/24		174.87	(174.87)
			June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	75003750 6/24		766.91	(941.78)
			June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	14211182 6/24		1,202.52	(2,144.30)
			June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	15190172 6/24		1,236.91	(3,381.21)
			June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	16798382 6/24		857.72	(4,238.93)
			June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	16798462 6/24		1,298.82	(5,537.75)
			June 2024 Statement				
07/02/2024	AP	INV	GREATAMERICA FINANCIAL SVCS	36852782		101.00	(5,638.75)
			Standard Payment				
07/03/2024	CD	CHK	SUMMARY CD 07/03/2024		5,638.75		0.00
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	7838		50.70	(50.70)
			Collections - YS various titles				
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	6032		9.76	(60.46)
			Expo Markers for Study Room				
07/05/2024	AP	INV	MILWAUKEE JOURNAL SENTINEL	6519		18.00	(78.46)
			MKE Journal Sentinel subscription				
07/05/2024	AP	INV	Sendik's Food Market	3113		50.00	(128.46)
			Gift Cards for Graduating Shelves				
07/05/2024	AP	INV	Mobile Beacon	8995		66.00	(194.46)
			Hotspots				
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	97.16		97.16	(291.62)
			UPS Battery Backups				
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	2062		67.80	(359.42)
			YS various titles				
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	6298		15.73	(375.15)
			Tape				
07/05/2024	AP	INV	DriveStrike	3952		22.00	(397.15)
			615				
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	3333		74.69	(471.84)
			Kids Headphones				
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	5106		52.77	(524.61)
			YS various titles				
07/08/2024	AP	INV	Scalefusion Inc.	6677		48.00	(572.61)
			License				
07/08/2024	AP	INV	Lenovo	9557		560.36	(1,132.97)
			Tech - Donation for digitization				



TRANSACTIONS FROM 07/01/2024 TO 07/31/2024

Date	JNL	Type	Description	Reference #	Debits	Credits	Balance
<b>13-00000-21100 ACCOUNTS PAYABLE</b>				(Continued)			
07/08/2024	AP	INV	Magnolia Journal	4863		30.00	(1,162.97)
			Magazine Renewal				
07/08/2024	AP	INV	AMAZON CAPITAL SERVICES	1477		6.76	(1,169.73)
			YS various titles				
07/08/2024	AP	INV	AMAZON CAPITAL SERVICES	8777		19.89	(1,189.62)
			Paper Products				
07/08/2024	AP	INV	AMAZON CAPITAL SERVICES	1344		9.44	(1,199.06)
			AS Titles				
07/08/2024	AP	INV	Spectrum Enterprise	8766		698.38	(1,897.44)
			Monthly Charges (2 months)				
07/08/2024	AP	INV	Spectrum Enterprise	3386		213.50	(2,110.94)
			Monthly Charges (2 months)				
07/10/2024	CD	CHK	SUMMARY CD 07/10/2024		2,110.94		0.00
07/10/2024	AP	INV	FORWARD TS, LTD	AR230554		13.89	(13.89)
			Magenta Toner				
07/10/2024	AP	INV	FORWARD TS, LTD	AR230524		176.53	(190.42)
			Library Copier 6/3 - 7/2/2024				
07/10/2024	AP	INV	FORWARD TS, LTD	AR230523		20.00	(210.42)
			Library Copier 6/3 - 7/2/2024				
07/10/2024	AP	INV	BRODART CO.	642054		461.81	(672.23)
			Laminating Rolls and Fold on Roll				
07/10/2024	AP	INV	BLACKSTONE PUBLISHING	2160914		273.23	(945.46)
			Misc Library CDs				
07/10/2024	AP	INV	GALE	84568513		23.99	(969.45)
			Misc Book				
07/10/2024	AP	INV	GALE	84590614		78.40	(1,047.85)
			Misc Books				
07/10/2024	AP	INV	GALE	8459024		49.60	(1,097.45)
			Misc Books				
07/10/2024	AP	INV	ARMSTRONG CONSULTING GROUP, INC.	10378		940.00	(2,037.45)
			Domain Name Renewals				
07/11/2024	AP	INV	SECURIAN FINANCIAL GROUP, INC.	04702-August 2024		137.75	(2,175.20)
			August Premiums				
07/12/2024	CD	CHK	SUMMARY CD 07/12/2024		2,175.20		0.00
07/18/2024	AP	INV	WE ENERGIES	0070316-2286-8		3,718.11	(3,718.11)
			June 2024 Charges				
07/19/2024	CD	CHK	SUMMARY CD 07/19/2024		3,718.11		0.00
07/23/2024	AP	INV	GALE	84622551		27.99	(27.99)
			Misc Books				
07/23/2024	AP	INV	GALE	84652700		28.79	(56.78)
			Misc Books				
07/23/2024	AP	INV	GALE	84653981		78.72	(135.50)
			Misc Books				
07/23/2024	AP	INV	GALE	84668091		95.97	(231.47)
			Misc Books				
07/23/2024	AP	INV	BLACKSTONE PUBLISHING	2161567		80.00	(311.47)
			Library CDs				
07/24/2024	AP	INV	DELTA DENTAL OF WISCONSIN	2180400		244.38	(555.85)
			August 2024 Premiums				
07/24/2024	AP	INV	UNITED HEALTHCARE	177474393746		3,757.24	(4,313.09)
			August 2024 Premiums				
07/25/2024	CD	CHK	SUMMARY CD 07/25/2024		4,313.09		0.00
07/30/2024	AP	INV	GALE	84689093		27.20	(27.20)
			The Midnight Feast				
07/30/2024	AP	INV	BLACKSTONE PUBLISHING	2163053		400.00	(427.20)
			Misc Library CDs				
07/30/2024	AP	INV	BLACKSTONE PUBLISHING	2162827		40.00	(467.20)
			Library CD				
07/30/2024	AP	INV	ROBB GREGG	2024-07		375.00	(842.20)
			July 2024 Garden				
07/31/2024			13-00000-21100	END BALANCE	17,956.09	18,798.29	(842.20)
07/01/2024			<b>13-00000-21550 DEPOSITS/SUSPENSE</b>		BEG. BALANCE		(86.33)
07/31/2024			13-00000-21550	END BALANCE	0.00	0.00	(86.33)



Date	JNL	Type	Description	Reference #	Debits	Credits	Balance
07/01/2024			<b>13-00000-24600 DEFERRED REVENUE - TAXES</b>		BEG. BALANCE		(900,526.00)
07/31/2024			13-00000-24600	END BALANCE	0.00	0.00	(900,526.00)
07/01/2024			<b>13-00000-25199 ACCRUED PAYROLL</b>		BEG. BALANCE		(11,011.11)
07/31/2024			13-00000-25199	END BALANCE	0.00	0.00	(11,011.11)
07/01/2024			<b>13-00000-25400 WRS Retirement - Payroll Deduct:</b>		BEG. BALANCE		(3,292.81)
07/12/2024	PR	CHK	SUMMARY PR 07/12/2024			1,135.89	(4,428.70)
07/26/2024	PR	CHK	SUMMARY PR 07/26/2024			1,175.11	(5,603.81)
07/31/2024	GJ	JE	Monthly WRS ACH Payment	5608	2,328.93		(3,274.88)
07/31/2024			13-00000-25400	END BALANCE	2,328.93	2,311.00	(3,274.88)
07/01/2024			<b>13-00000-28100 SURPLUS</b>		BEG. BALANCE		(159,209.37)
07/31/2024			13-00000-28100	END BALANCE	0.00	0.00	(159,209.37)
07/01/2024			<b>13-00000-43792 Other Grants</b>		BEG. BALANCE		(2,300.00)
07/31/2024			13-00000-43792	END BALANCE	0.00	0.00	(2,300.00)
07/01/2024			<b>13-00000-43793 Library MCFLS RB Payment</b>		BEG. BALANCE		(57,191.00)
07/31/2024			13-00000-43793	END BALANCE	0.00	0.00	(57,191.00)
07/01/2024			<b>13-00000-45209 LIBRARY FINES</b>		BEG. BALANCE		(11,639.42)
07/05/2024	CR	RCPT	LIBRARY FINES	218392		217.32	(11,856.74)
07/12/2024	CR	RCPT	LIBRARY FINES	219339		180.89	(12,037.63)
07/22/2024	CR	RCPT	LIBRARY FINES	220589		194.99	(12,232.62)
07/28/2024	CR	RCPT	LIBRARY FINES	220817		3,600.10	(15,832.72)
07/30/2024	CR	RCPT	LIBRARY FINES	220902		64.25	(15,896.97)
07/31/2024			13-00000-45209	END BALANCE	0.00	4,257.55	(15,896.97)
07/01/2024			<b>13-00000-45210 Library Replacement Cards</b>		BEG. BALANCE		(40.00)
07/05/2024	CR	RCPT	Library Replacement Cards	218392		4.00	(44.00)
07/12/2024	CR	RCPT	Library Replacement Cards	219339		4.00	(48.00)
07/30/2024	CR	RCPT	Library Replacement Cards	220902		2.60	(50.60)
07/31/2024			13-00000-45210	END BALANCE	0.00	10.60	(50.60)
07/01/2024			<b>13-00000-45224 LIBRARY DAMAGE RECOVERY</b>		BEG. BALANCE		11.95
07/31/2024			13-00000-45224	END BALANCE	0.00	0.00	11.95
07/01/2024			<b>13-00000-46712 LIBRARY ROOM RENT</b>		BEG. BALANCE		(2,573.45)
07/28/2024	CR	RCPT	LIBRARY ROOM RENT	220817		305.00	(2,878.45)
07/31/2024			13-00000-46712	END BALANCE	0.00	305.00	(2,878.45)
07/01/2024			<b>13-00000-46713 LIBRARY COPY AND FAX FEES</b>		BEG. BALANCE		(2,954.05)
07/05/2024	CR	RCPT	LIBRARY COPY AND FAX FEES	218392		146.30	(3,100.35)
07/12/2024	CR	RCPT	LIBRARY COPY AND FAX FEES	219339		275.03	(3,375.38)
07/22/2024	CR	RCPT	LIBRARY COPY AND FAX FEES	220589		127.75	(3,503.13)
07/28/2024	CR	RCPT	LIBRARY COPY AND FAX FEES	220817		62.05	(3,565.18)
07/30/2024	CR	RCPT	LIBRARY COPY AND FAX FEES	220902		9.50	(3,574.68)
07/31/2024			13-00000-46713	END BALANCE	0.00	620.63	(3,574.68)
07/01/2024			<b>13-00000-46715 MISCELLANEOUS REVENUE</b>		BEG. BALANCE		(691.44)
07/31/2024			13-00000-46715	END BALANCE	0.00	0.00	(691.44)
07/01/2024			<b>13-00000-48501 LIBRARY DONATIONS</b>		BEG. BALANCE		(1,250.00)



TRANSACTIONS FROM 07/01/2024 TO 07/31/2024

Date	JNL	Type	Description	Reference #	Debits	Credits	Balance
			<b>13-00000-48501 LIBRARY DONATIONS</b>	(Continued)			
07/22/2024	CR	RCPT	LIBRARY DONATIONS	220589		265.00	(1,515.00)
07/28/2024	CR	RCPT	LIBRARY DONATIONS	220817		395.00	(1,910.00)
07/31/2024			13-00000-48501	END BALANCE	0.00	660.00	(1,910.00)
			<b>13-93000-50100 Salaries</b>	BEG. BALANCE			
07/01/2024							294,304.09
07/12/2024	PR	CHK	SUMMARY PR 07/12/2024		21,961.59		316,265.68
07/26/2024	PR	CHK	SUMMARY PR 07/26/2024		22,240.94		338,506.62
07/31/2024			13-93000-50100	END BALANCE	44,202.53	0.00	338,506.62
			<b>13-93000-50150 FICA Tax</b>	BEG. BALANCE			
07/01/2024							22,297.71
07/12/2024	PR	CHK	SUMMARY PR 07/12/2024		1,632.80		23,930.51
07/26/2024	PR	CHK	SUMMARY PR 07/26/2024		1,716.43		25,646.94
07/31/2024			13-93000-50150	END BALANCE	3,349.23	0.00	25,646.94
			<b>13-93000-50160 Health/Dental Insurance Premium</b>	BEG. BALANCE			
07/01/2024							28,509.72
07/26/2024	PR	CHK	SUMMARY PR 07/26/2024		4,751.62		33,261.34
07/31/2024			13-93000-50160	END BALANCE	4,751.62	0.00	33,261.34
			<b>13-93000-50161 Health Insurance Deductible (Di</b>	BEG. BALANCE			
07/01/2024							1,570.00
07/26/2024	PR	CHK	SUMMARY PR 07/26/2024		62.50		1,632.50
07/31/2024			13-93000-50161	END BALANCE	62.50	0.00	1,632.50
			<b>13-93000-50170 Retirement Contribution - ER po</b>	BEG. BALANCE			
07/01/2024							15,299.46
07/12/2024	PR	CHK	SUMMARY PR 07/12/2024		1,135.89		16,435.35
07/26/2024	PR	CHK	SUMMARY PR 07/26/2024		1,175.11		17,610.46
07/31/2024			13-93000-50170	END BALANCE	2,311.00	0.00	17,610.46
			<b>13-93000-50180 Group Life Insurance Premium</b>	BEG. BALANCE			
07/01/2024							672.80
07/12/2024	PR	CHK	SUMMARY PR 07/12/2024		137.75		810.55
07/31/2024			13-93000-50180	END BALANCE	137.75	0.00	810.55
			<b>13-93200-50190 Training/Meetings/Travel</b>	BEG. BALANCE			
07/01/2024							532.16
07/31/2024			13-93200-50190	END BALANCE	0.00	0.00	532.16
			<b>13-93200-50191 Membership Dues</b>	BEG. BALANCE			
07/01/2024							1,046.22
07/31/2024			13-93200-50191	END BALANCE	0.00	0.00	1,046.22
			<b>13-93200-50194 Personnel Related Expenses</b>	BEG. BALANCE			
07/01/2024							17.64
07/05/2024	AP	INV	Sendik's Food Market	3113	50.00		67.64
07/31/2024			Gift Cards for Graduating Shelves				
			13-93200-50194	END BALANCE	50.00	0.00	67.64
			<b>13-93200-50250 Utilities</b>	BEG. BALANCE			
07/01/2024							22,497.96
07/06/2024	GJ	JE	Quarterly utility payments	5597	981.64		23,479.60
07/18/2024	AP	INV	WE ENERGIES	0070316-2286-8	3,718.11		27,197.71
07/31/2024			June 2024 Charges				
			13-93200-50250	END BALANCE	4,699.75	0.00	27,197.71
			<b>13-93200-50251 Telephone/Internet</b>	BEG. BALANCE			
07/01/2024							2,047.13
07/08/2024	AP	INV	Spectrum Enterprise	8766	698.38		2,745.51
			Monthly Charges (2 months)				
07/08/2024	AP	INV	Spectrum Enterprise	3386	213.50		2,959.01
			Monthly Charges (2 months)				
07/31/2024			13-93200-50251	END BALANCE	911.88	0.00	2,959.01
			<b>13-93200-50300 Office Supplies</b>	BEG. BALANCE			
07/01/2024							464.69
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	6032	9.76		474.45
			Expo Markers for Study Room				



TRANSACTIONS FROM 07/01/2024 TO 07/31/2024

Date	JNL	Type	Description	Reference #	Debits	Credits	Balance
			<b>13-93200-50300 Office Supplies</b>	(Continued)			
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES Tape	6298	15.73		490.18
07/08/2024	AP	INV	AMAZON CAPITAL SERVICES Paper Products	8777	19.89		510.07
07/31/2024			13-93200-50300	END BALANCE	45.38	0.00	510.07
			<b>13-93200-50301 Printing/Publishing/Copies</b>	BEG. BALANCE			
07/01/2024							265.00
07/31/2024			13-93200-50301	END BALANCE	0.00	0.00	265.00
			<b>13-93200-50302 Postage</b>	BEG. BALANCE			
07/01/2024							1.83
07/31/2024			13-93200-50302	END BALANCE	0.00	0.00	1.83
			<b>13-93200-50360 Building Maintenance</b>	BEG. BALANCE			
07/01/2024							18,896.99
07/30/2024	AP	INV	ROBB GREGG July 2024 Garden	2024-07	375.00		19,271.99
07/31/2024			13-93200-50360	END BALANCE	375.00	0.00	19,271.99
			<b>13-93200-50428 Library Director Designated</b>	BEG. BALANCE			
07/01/2024							50,821.93
07/31/2024			13-93200-50428	END BALANCE	0.00	0.00	50,821.93
			<b>13-93200-50760 Sales Tax</b>	BEG. BALANCE			
07/01/2024							168.17
07/09/2024	GJ	JE	Monthly Sales Tax ACH Payment	5594	32.34		200.51
07/31/2024			13-93200-50760	END BALANCE	32.34	0.00	200.51
			<b>13-93300-50240 IT Support Contract Services</b>	BEG. BALANCE			
07/01/2024							5,714.34
07/05/2024	AP	INV	Mobile Beacon Hotspots	8995	66.00		5,780.34
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES UPS Battery Backups	97.16	97.16		5,877.50
07/05/2024	AP	INV	DriveStrike 615	3952	22.00		5,899.50
07/08/2024	AP	INV	Scalefusion Inc. License	6677	48.00		5,947.50
07/08/2024	AP	INV	Lenovo Tech - Donation for digitization	9557	560.36		6,507.86
07/10/2024	AP	INV	ARMSTRONG CONSULTING GROUP, INC. Domain Name Renewals	10378	940.00		7,447.86
07/31/2024			13-93300-50240	END BALANCE	1,733.52	0.00	7,447.86
			<b>13-93300-50311 Copier Maintenance/Repair</b>	BEG. BALANCE			
07/01/2024							1,334.16
07/02/2024	AP	INV	GREATAMERICA FINANCIAL SVCS Standard Payment	36852782	101.00		1,435.16
07/10/2024	AP	INV	FORWARD TS, LTD Magenta Toner	AR230554	13.89		1,449.05
07/10/2024	AP	INV	FORWARD TS, LTD Library Copier 6/3 - 7/2/2024	AR230524	176.53		1,625.58
07/10/2024	AP	INV	FORWARD TS, LTD Library Copier 6/3 - 7/2/2024	AR230523	20.00		1,645.58
07/31/2024			13-93300-50311	END BALANCE	311.42	0.00	1,645.58
			<b>13-93300-50312 Material Processing/Repairs</b>	BEG. BALANCE			
07/01/2024							1,747.06
07/10/2024	AP	INV	BRODART CO. Laminating Rolls and Fold on Roll	642054	461.81		2,208.87
07/31/2024			13-93300-50312	END BALANCE	461.81	0.00	2,208.87
			<b>13-93300-50350 Maintenance Service &amp; Supplies</b>	BEG. BALANCE			
07/01/2024							14,500.00
07/31/2024			13-93300-50350	END BALANCE	0.00	0.00	14,500.00



TRANSACTIONS FROM 07/01/2024 TO 07/31/2024

Date	JNL	Type	Description	Reference #	Debits	Credits	Balance
07/01/2024			<b>13-93300-50351 Custodial Supplies</b>		BEG. BALANCE		2,017.77
07/05/2024	CR	RCPT	Custodial Supplies	218392		398.69	1,619.08
07/31/2024			13-93300-50351	END BALANCE	0.00	398.69	1,619.08
07/01/2024			<b>13-93300-50400 MCFLS Supplies</b>		BEG. BALANCE		731.09
07/31/2024			13-93300-50400	END BALANCE	0.00	0.00	731.09
07/01/2024			<b>13-93400-50401 MCFLS Membership</b>		BEG. BALANCE		15,544.00
07/31/2024			13-93400-50401	END BALANCE	0.00	0.00	15,544.00
07/01/2024			<b>13-93400-50403 Programs - Children</b>		BEG. BALANCE		327.55
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	3333	74.69		402.24
07/31/2024			Kids Headphones				
07/31/2024			13-93400-50403	END BALANCE	74.69	0.00	402.24
07/01/2024			<b>13-93500-50410 Library Collection Materials</b>		BEG. BALANCE		51,833.43
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	40023382 6/24	174.87		52,008.30
07/02/2024	AP	INV	June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	75003750 6/24	766.91		52,775.21
07/02/2024	AP	INV	June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	L4211182 6/24	1,202.52		53,977.73
07/02/2024	AP	INV	June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	L5190172 6/24	1,236.91		55,214.64
07/02/2024	AP	INV	June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	L6798382 6/24	857.72		56,072.36
07/02/2024	AP	INV	June 2024 Statement				
07/02/2024	AP	INV	BAKER & TAYLOR BOOKS	L6798462 6/24	1,298.82		57,371.18
07/02/2024	AP	INV	June 2024 Statement				
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	7838	50.70		57,421.88
07/05/2024	AP	INV	Collections - YS various titles				
07/05/2024	AP	INV	MILWAUKEE JOURNAL SENTINEL	6519	18.00		57,439.88
07/05/2024	AP	INV	MKE Journal Sentinel subscription				
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	2062	67.80		57,507.68
07/05/2024	AP	INV	YS various titles				
07/05/2024	AP	INV	AMAZON CAPITAL SERVICES	5106	52.77		57,560.45
07/05/2024	AP	INV	YS various titles				
07/08/2024	AP	INV	Magnolia Journal	4863	30.00		57,590.45
07/08/2024	AP	INV	Magazine Renewal				
07/08/2024	AP	INV	AMAZON CAPITAL SERVICES	1477	6.76		57,597.21
07/08/2024	AP	INV	YS various titles				
07/08/2024	AP	INV	AMAZON CAPITAL SERVICES	1344	9.44		57,606.65
07/08/2024	AP	INV	AS Titles				
07/10/2024	AP	INV	BLACKSTONE PUBLISHING	2160914	273.23		57,879.88
07/10/2024	AP	INV	Misc Library CDs				
07/10/2024	AP	INV	GALE	84568513	23.99		57,903.87
07/10/2024	AP	INV	Misc Book				
07/10/2024	AP	INV	GALE	84590614	78.40		57,982.27
07/10/2024	AP	INV	Misc Books				
07/10/2024	AP	INV	GALE	8459024	49.60		58,031.87
07/10/2024	AP	INV	Misc Books				
07/23/2024	AP	INV	GALE	84622551	27.99		58,059.86
07/23/2024	AP	INV	Misc Books				
07/23/2024	AP	INV	GALE	84652700	28.79		58,088.65
07/23/2024	AP	INV	Misc Books				
07/23/2024	AP	INV	GALE	84653981	78.72		58,167.37
07/23/2024	AP	INV	Misc Books				
07/23/2024	AP	INV	GALE	84668091	95.97		58,263.34
07/23/2024	AP	INV	Misc Books				
07/23/2024	AP	INV	BLACKSTONE PUBLISHING	2161567	80.00		58,343.34
07/23/2024	AP	INV	Library CDs				
07/30/2024	AP	INV	GALE	84689093	27.20		58,370.54
07/30/2024	AP	INV	The Midnight Feast				



Date	JNL	Type	Description	Reference #	Debits	Credits	Balance
			<b>13-93500-50410 Library Collection Materials</b>	(Continued)			
07/30/2024	AP	INV	BLACKSTONE PUBLISHING Misc Library CDs	2163053	400.00		58,770.54
07/30/2024	AP	INV	BLACKSTONE PUBLISHING Library CD	2162827	40.00		58,810.54
07/31/2024			13-93500-50410	END BALANCE	6,977.11	0.00	58,810.54



# WHITEFISH BAY PUBLIC LIBRARY

# STATISTICS

TOTAL CIRCULATION STATISTICS : PHYSICAL + DIGITAL CIRCULATION														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	25,223	23,698	26,790	24,067	23,405	27,946	29,536	28,858	24,097	25,356	25,108	24,403	308,487	180,665
2024	27,157	26,176	27,834	27,040	25,836	28,501	30,612							193,156
23-24	8%	10%	4%	12%	10%	2%	4%							7%
PHYSICAL CIRCULATION														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	21,136	19,896	22,525	20,148	19,373	23,951	25,176	24,700	20,016	20,541	20,167	19,166	256,795	152,205
2024	21,828	21,092	22,149	22,514	20,824	23,851	25,866							158,124
23-24	3%	6%	-2%	12%	7%	0%	3%							4%
DIGITAL CIRCULATION														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	4,087	3,802	4,265	3,919	4,032	3,995	4,360	4,158	4,081	4,815	4,941	5,237	51,692	28,460
2024	5,329	5,084	5,685	4,526	5,012	4,650	4,746							35,032
23-24	30%	34%	33%	15%	24%	16%	9%							23%
DIGITAL CIRCULATION AS % OF TRADITIONAL CIRCULATION (Libby, RB, Hoopla)														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	19%	19%	19%	19%	21%	17%	17%	17%	20%	23%	25%	27%	20%	18.8%
2024	24%	24%	26%	20%	24%	19%	18%							22.3%
23-24	26%	26%	36%	3%	16%	17%	6%							19%
LIBBY (Formerly Overdrive. Print books, Audio books, Music)														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	3,101	2,905	3,298	3,029	3,088	3,080	3,353	3,180	2,990	3,352	3,513	3,659	38,548	21,854
2024	3,738	3,522	3,965	3,334	3,488	3,291	3,427							24,765
23-24	21%	21%	20%	10%	13%	7%	2%							13%
HOOPLA (Print Books, Audio Books, Music, Movies)														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	408	326	400	379	451	436	453	421	403	433	359	440	4,909	2,853
2024	476	451	498	526	475	464	483							3,373
23-24	17%	38%	25%	39%	5%	6%	7%							18%
DIGITAL MAGAZINES														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	289	293	334	264	296	273	254	282	484	798	863	851	5,281	2,003
2024	862	878	912	486	790	632	535							5,095
23-24	198%	200%	173%	84%	167%	132%	111%							154%
KANOPY (PLAYS)														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	286	278	228	232	197	202	185	191	192	211	191	287	2,680	1,608
2024	253	233	310	180	259	263	301							1,799
23-24	-12%	-16%	36%	-22%	31%	30%	63%							12%
KANOPY (Unique Users)														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	66	59	53	56	47	50	50	47	50	55	48	52	633	381
2024	49	44	48	45	47	48	46							327
23-24	-26%	-25%	-9%	-20%	0%	-4%	-8%							-14%



# WHITEFISH BAY PUBLIC LIBRARY

# STATISTICS

NewsBank		Started Nov 2023												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	
2023											65	74	139	
2024	53	62	43	51	10	technical interruption								
23-24														
Ancestry														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	168	229	65	446	590	259	84	286	131	35	181	243	2,717	1,841
2024	30	184	110	315	5	technical interruption								644
23-24	-82%	-20%	69%	-29%	-99%									-65%
SELF-CHECK CIRCULATION STATISTICS FOR WHITEFISH BAY LIBRARY														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	8,504	6,562	8,869	7,522	7,885	11,322	11,969	11,830	8,602	8,929	8,466	8,102	108,562	62,633
2024	8,962	9,134	9,574	9,820	8,985	11,458	12,368							70,301
23-24	5%	39%	8%	31%	14%	1%	3%							12%
SELF-CHECK AS % OF TRADITIONAL CIRCULATION														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	40%	33%	39%	37%	41%	47%	48%	48%	43%	43%	42%	42%	40%	40.8%
2024	41%	43%	43%	44%	43%	48%	48%							44.3%
23-24	2%	31%	10%	17%	6%	2%	1%							9%
STAFF-CHECK CIRCULATION STATISTICS FOR WHITEFISH BAY LIBRARY														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	12,612	13,104	13,193	12,292	11,129	12,125	12,646	12,255	10,922	10,889	10,931	10,389	142,487	87,101
2024	12,009	11,015	11,712	11,916	11,073	11,556	12,743							82,024
23-24	-5%	-16%	-11%	-3%	-1%	-5%	1%							-6%
	-603	-2,089	-1,481	-376	-56	-569	97							-4,549
MOBILE APP CIRC														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	20	22	39	24	11	6	30	9	29	42	15	15	262	152
2024	9	33	21	19	31	26	14							153
23-24	-55%	50%	-46%	-21%	182%	333%	-53%							1%
LOCKER CIRC														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	3	208	424	310	348	498	531	606	463	681	755	660	5,487	2,322
2024	848	910	842	759	735	811	741							5,646
23-24	28167%	338%	99%	145%	111%	63%	40%							143%
WIRELESS (Clients per Month)														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	4,801	4,102	4,248	4,490	4,688	4,671	4,247	4,402	4,530	5,146	4,860	4,712	54,897	31,247
2024	5,270	4,727	4,650	5,160	5,146	4,830	4,867							34,650
23-24	10%	15%	9%	15%	10%	3%	15%							11%
WIRELESS (Unique Users)														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	1,569	1,307	1,330	1,528	1,617	1,702	1,499	1,606	1,588	1,818	1,784	1,742	19,090	10,552
2024	1,907	1,709	1,744	1,920	1,813	1,823	1,789							12,705
23-24	22%	31%	31%	26%	12%	7%	19%							20%



# WHITEFISH BAY PUBLIC LIBRARY

# STATISTICS

WIRELESS (Avg MB Usage per Client)														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	523	601	635	455	443	450	405	400	445	385	540	505	5,786	3,512
2024	467	558	437	419	500	454	607							3,441
23-24	-11%	-7%	-31%	-8%	13%	1%	50%							-2%
PC USER SESSIONS - # OF ADULT SESSIONS														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	1,076	1,052	1,089	1,019	943	1,033	992	1,315	1,131	968	1,043	922	12,583	7,204
2024	724	956	933	1,053	1,017	1,001	1,146							6,830
23-24	-33%	-9%	-14%	3%	8%	-3%	16%							-5%
PC USER SESSIONS - # OF KIDS SESSIONS														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	0	0	0	0	0	0	85	1,201	802	879	636	648	4,251	85
2024	727	689	809	684	709	1,023	1,007							5,648
23-24														
PC USER SESSIONS - # OF TOTAL SESSIONS														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	1,076	1,052	1,089	1,019	943	1,033	1,077	2,516	1,933	1,847	1,679	1,570	16,834	7,289
2024	1,451	1,645	1,742	1,737	1,726	2,024	2,153							12,478
23-24	35%	56%	60%	70%	83%	96%	100%							71%
PC USER SESSIONS - # OF ADULT HOURS														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	525	582	552	526	489	553	505	667	590	500	555	481	6,525	3,732
2024	353	493	495	525	530	546	613							3,555
23-24	-33%	-15%	-10%	0%	8%	-1%	21%							-5%
PC USER SESSIONS - # OF KIDS HOURS														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	0	0	0	0	0	0	34	507	346	384	274	296	1,841	34
2024	314	297	347	300	309	440	435							2,442
23-24														
PC USER SESSIONS - # OF TOTAL HOURS														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	525	582	552	526	489	553	539	1,174	936	884	829			3,766
2024	667	790	842	825	839	985	1,048							5,996
23-24	27%	36%	53%	57%	72%	78%	94%							59%
DOOR COUNT PER MONTH 2020 Door Counter Quit Working. Didn't replace until 2021.														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD Total
2023	11,930	11,497	12,135	13,052	11,605	14,323	14,098	14,520	11,782	12,251	12,417	10,890	150,500	88,640
2024	12,294	12,280	12,468	13,935	12,967	14,236	15,861							94,041
23-24	3%	7%	3%	7%	12%	-1%	13%							6%



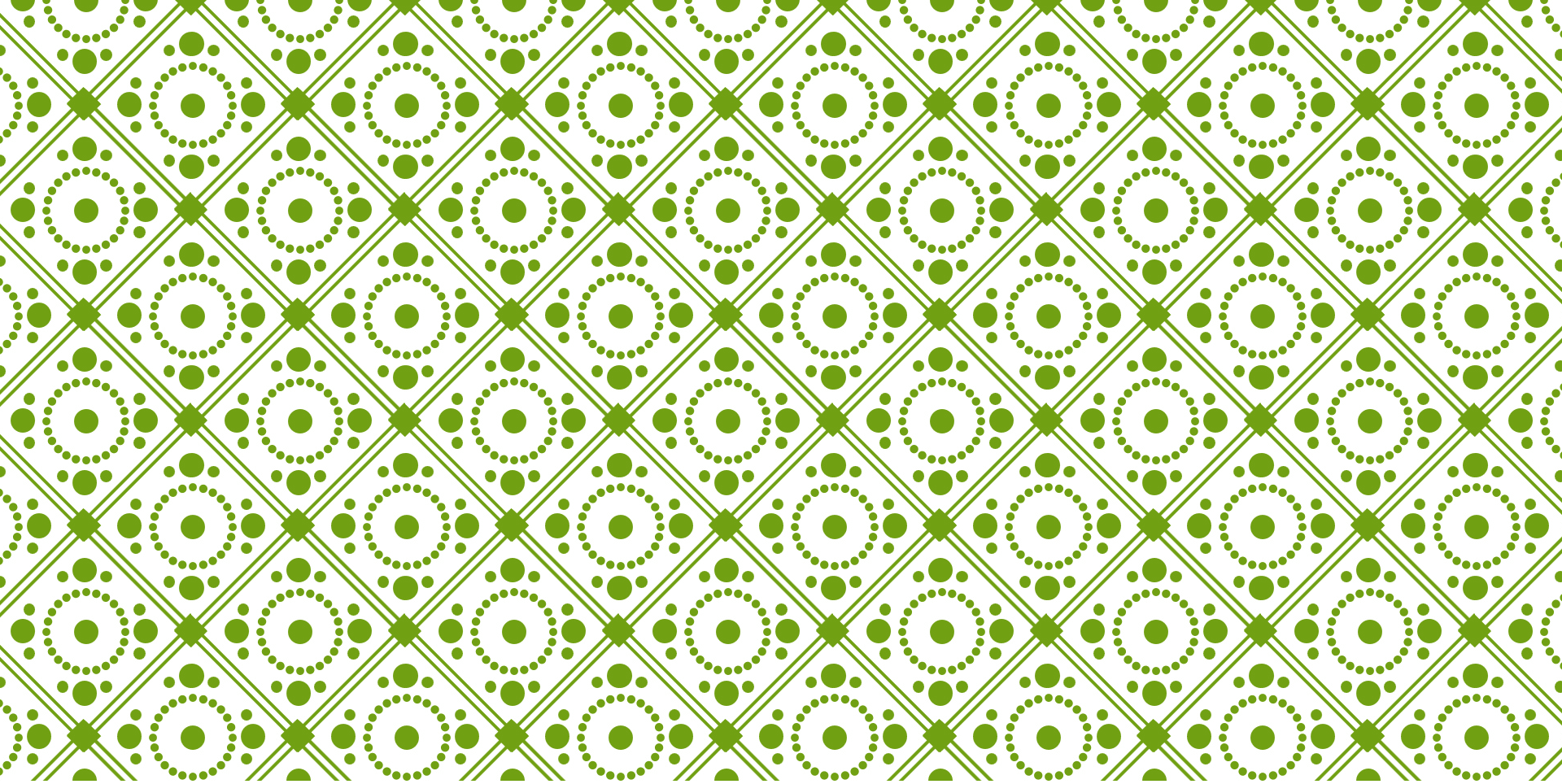
To: Whitefish Bay Public Library Board of Trustees  
From: Nyama Y. Reed, Library Director  
Date: August 27, 2024 Meeting  
Re: Director's Reports



Director (Reed)

- 1) Village
  - a) Kelsey McElroy will begin as Village Manager on September 30. The last 6 years she served as Assistant Village Administrator for Sussex, WI.
  - b) Director Reed will participate in interviews for Village Manager candidates.
- 2) Building
  - a) Regular maintenance occurs per schedule.
  - b) Significant repairs were made to a portion of the back roof where leaks have occurred for several years. The goal is for this repair to be a temporary fix until a new roof is installed. The new roof is tentatively planned to occur in the next couple of years.
  - c) Included in the Village Board packet for the August 26, 2024 (<https://www.wfbvillage.gov/agendacenter>) is info on solar panel options as part of the roof replacement project. Pages 57-90 of packet.
- 3) Foundation
  - a) The Foundation is planning a "Fall into Reading" event for Saturday September 28 in Schoolhouse Park.
  - b) Prep of the lobby wall for the Foundation donor board has started.
- 4) Friends – n/a
- 5) MCFLS – n/a
- 6) Grant
  - a) The Library received a \$1,000 grant from WiLS for working with a DEI consultant.
  - b) The grant coordinator connected Director Reed with Dr. Rainey Briggs from Meraki Consulting and the Superintendent of the Baraboo School District. We will hold a Zoom meeting next week to discuss potential collaboration and explore options for DEI training for the library's staff and board.
- 7) Donation tiles
  - a) Ann Wydeven, the artist who created the ceramic tiles as part of the 2002 building campaign, visited the library Tuesday 8/20 and meet with Director Reed. She assessed all tiles for structural integrity and found a few (6-8) that need stabilizing since they are starting to separate from their backboards.
  - b) She will provide a quote to: 1) create a tile for Barbara Bartley; 2) repair two broken tiles; 3) stabilize tiles that are starting to separate from their boards.
- 8) Staffing
  - a) Staffing at the adult and youth service desks has started to stabilize with substitute reference assistants filling in as needed.
  - b) Salaries and wages are projected to be underspent by about \$5,000 this year, likely due to part-time staff shortages during the first six months. Full-time staff covered desk shifts, resulting in lower wage expenses. With substitutes now available, expenses should return to expected levels.





# 2025-2028 MCFLS MEMBERSHIP AGREEMENTS

MCFLS LDAC  
July 30, 2024



# CURRENT MEMBERSHIP AGREEMENTS 2020 – 2024

Current agreements expire this December 31 with payments based on percentages of MCFLS state aid.

- ILS, Resource Sharing and Technology (IRST) (signed by all members)
- Resource Library (signed by MPL)
- Bibliographic and Database Maintenance (signed by MPL)

**50.25% of annual state aid currently goes to:**

- Reciprocal Borrowing (35% in 2025). Part of the IRST agreement.
- Resource Library (6.25%).
- Bibliographic and Database Maintenance (9%).
- This equates to **\$2,151,610** of the 2025 state aid total of **\$4,281,811**.



# NEW MEMBERSHIP AGREEMENTS 2025 – 2028

## Influences on New Membership Agreements

- 2025-2028 MCFLS Strategic Plan
  - Data analyst assistance
  - System staff training and development
- Trustee and Member Feedback
- Changes to MCFLS Role
  - Providing infrastructure vs content
- Rising Content Costs (example: hoopla costs)



# NEW MEMBERSHIP AGREEMENTS 2025 – 2028

## Cost Assumptions Made

- State aid will remain flat in my calculations, but will likely go up over the course of the agreements, increasing payouts to members.
- ILS and Cataloging costs are assumed to rise 3% each year. The ILS costs cannot exceed 3% year over year per our current contract. Cataloging cost increases will be negotiated with MPL.
- Hoopla costs are variable, but I've estimated a 5% increase year over year for member libraries.
- I've estimated a total cost for a full-time data analyst will run approximately \$120,000 starting in 2027 and include 2% COLA increases every year after.



# NEW MEMBERSHIP AGREEMENTS 2025 – 2028

## Proposed Changes to Agreements

- MCFLS pays infrastructure costs related to the Sierra ILS and the Cataloging contract. Estimated savings to members over four years: \$1,865,007.
- MCFLS will no longer subsidize hoopla costs through the buying pool budget line. Estimated costs to members over 4 years: \$1,842,578.
- Use small reductions to agreement payouts to allow the system to pay for infrastructure costs and spread the benefit to all members.



# ILS, RESOURCE SHARING AND TECHNOLOGY AGREEMENT

## Proposed Changes to Reciprocal Borrowing

- Two options for distributing funding:
  - Option 1: Keep RB formula unchanged and keep percentage at 35% of state aid in 2026, but reduce percentages to 33% in 2027/2028 and 31% in 2029 to pay for infrastructure costs.
  - Option 2: Use percentages in Option 1, but reimagine these payments as **Collection Development Grants** using a formula of 75% RB net positive transactions and 25% items added to the collection in a given year. Rationale: Reward net lenders and libraries that contribute to overall collection development for the system and remove the winners/losers scenario currently in place.
- Majority of MCFLS Trustees chose Option 2 on July 18 when asked for a preference.



# ILS, RESOURCE SHARING AND TECHNOLOGY AGREEMENT

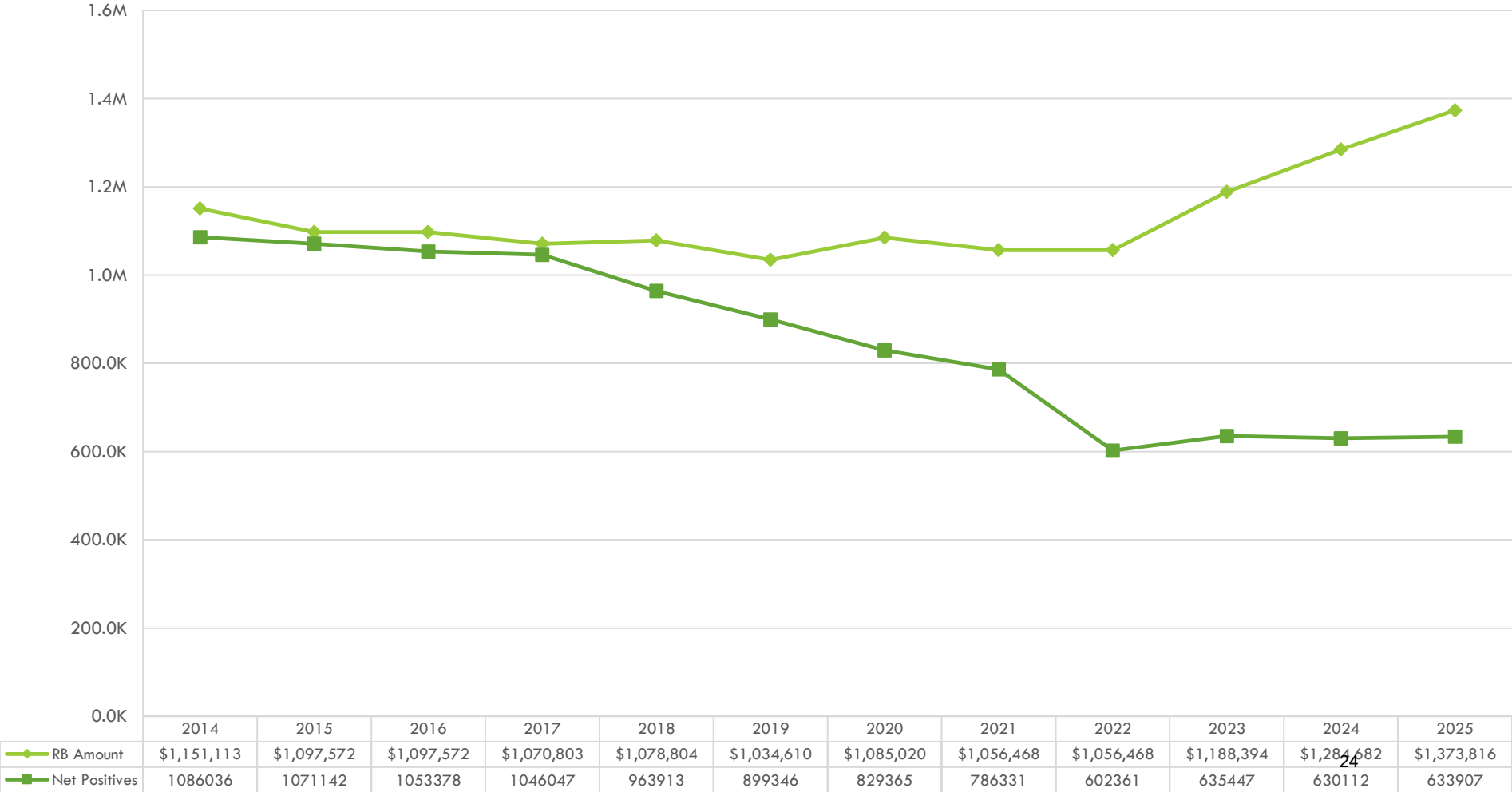
## Possible changes to contract language

- Adding a maintenance of effort clause requiring members to maintain investments in their collections.
- Using loan rules of the circulating library rather than the owning library when materials are checked out. A majority of systems in Wisconsin use this model.
- System-wide fee card concept.
- Additional changes based on system absorption of ILS and Cataloging costs.
- Other changes?



# RECIPROCAL BORROWING HISTORICAL DATA

NET POSITIVE TRANSACTIONS AND RECIPROCAL BORROWING





# RESOURCE LIBRARY AGREEMENT

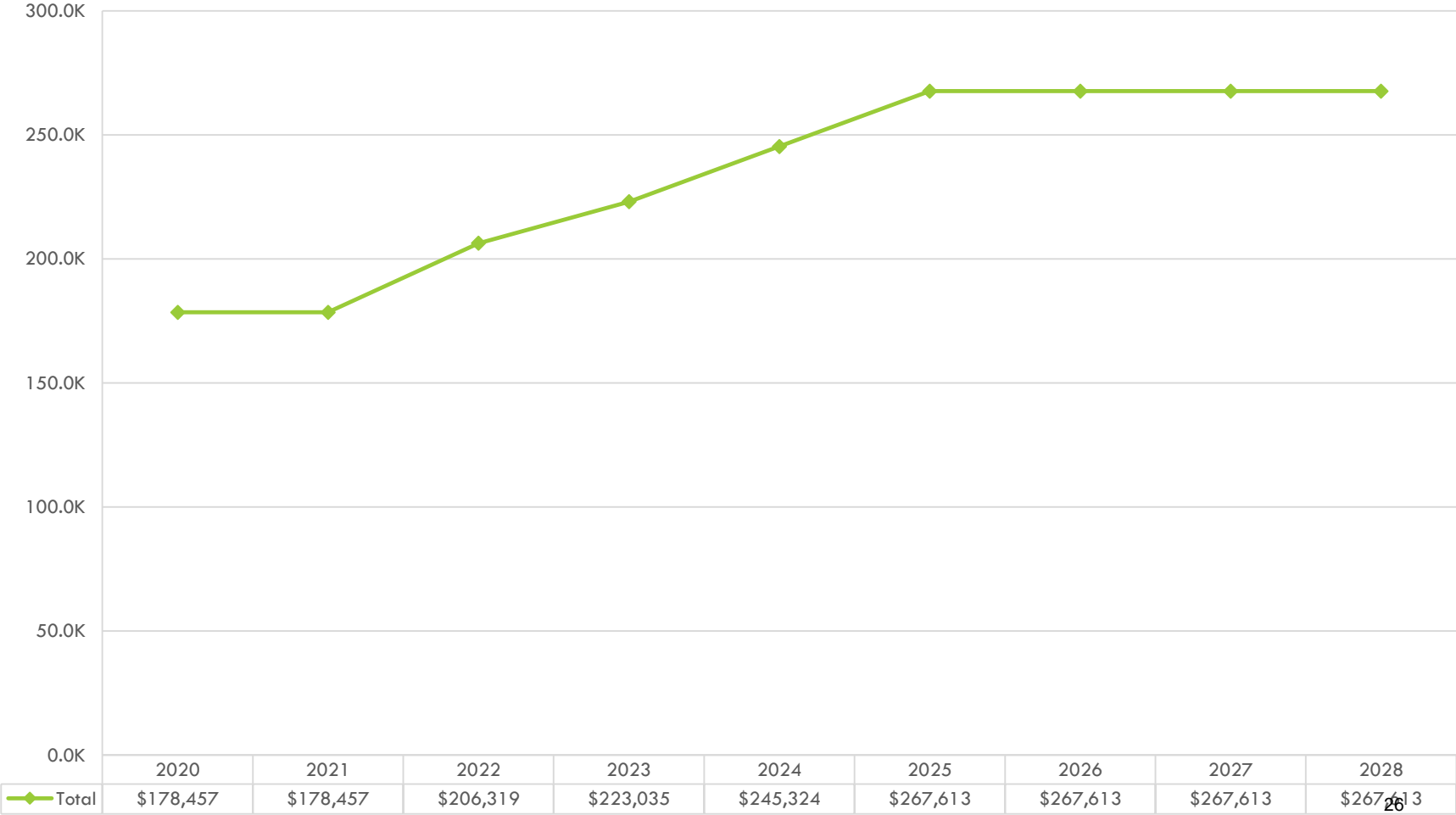
## Proposed Changes

- The percentage of state aid reserved for the contract remains at 6.25% to help with taking on hoopla costs.
- At this time, there are only minor revisions to the contract language in place. The agreement will now formalize the arrangement for MPL to provide liaison leadership to the system for both Youth and Inclusive Services, something they've provided for the last several years.



# RESOURCE LIBRARY PAYMENT HISTORICAL DATA

RESOURCE LIBRARY PAYMENTS





# CATALOGING CONTRACT

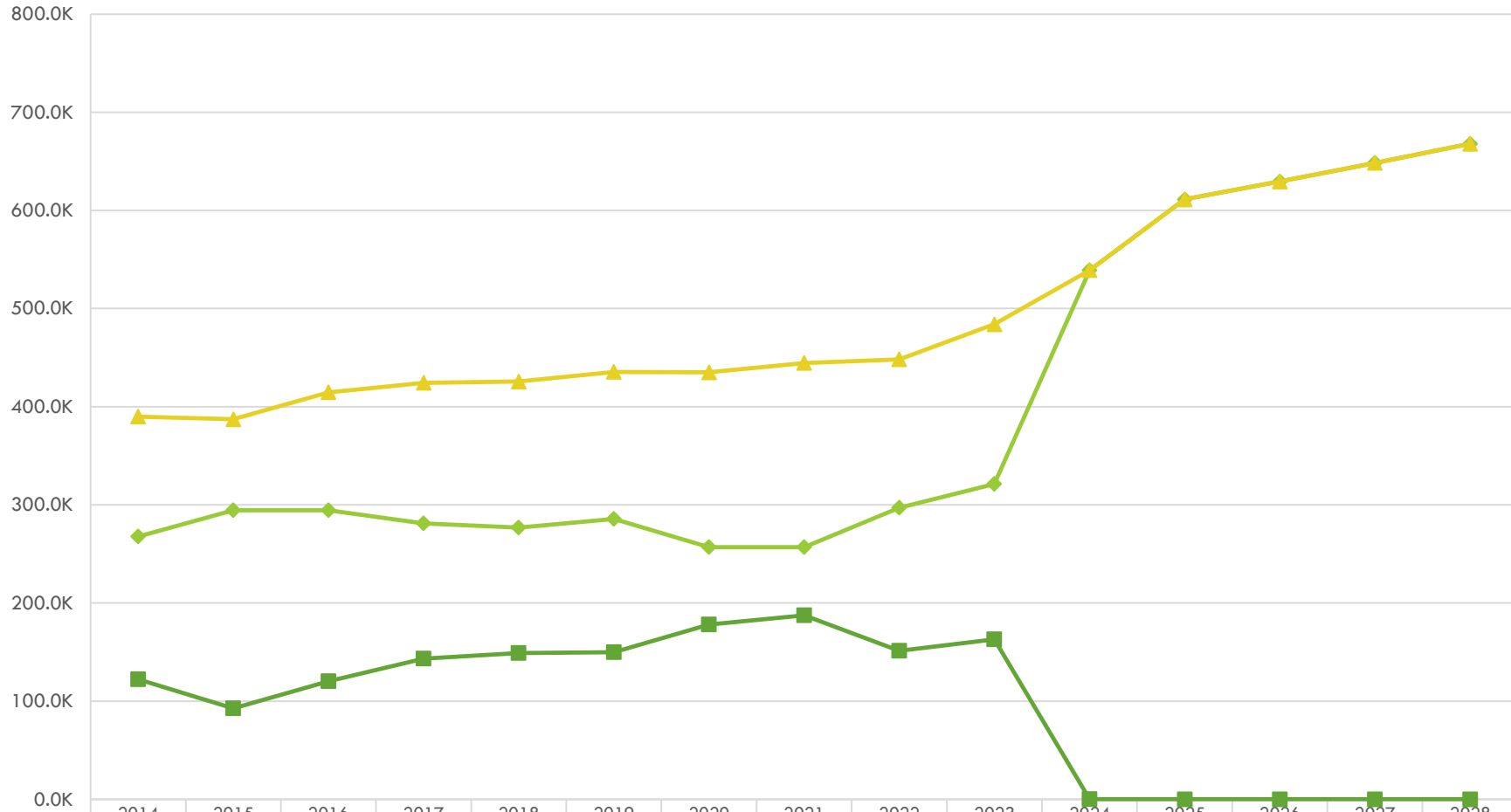
## Proposed Changes

- We've continued working with MPL on an extensive rewrite of the agreement, mostly updating services and responsibilities already in place. Additional language we've added will bring increased accountability and reporting to our members that will show the return on investment for this agreement.
- I am proposing the MCFLS take over complete payment of the terms of this agreement rather than sharing costs with members. At one point in time this contract was completely paid for by MCFLS.



# CATALOGING PAYMENT HISTORICAL DATA

## MCFLS AND MEMBER CATALOGING COSTS



MCFLS Amount	\$267,701	\$294,471	\$294,471	\$281,086	\$276,676	\$285,532	\$256,979	\$256,979	\$297,099	\$321,171	\$539,036	\$611,154	\$629,489	\$648,373	\$667,824
Member Amount	\$122,229	\$92,656	\$120,244	\$143,314	\$149,006	\$149,846	\$177,992	\$187,546	\$151,177	\$162,821	\$-	\$-	\$-	\$-	\$-
Sum of Contract	\$389,930	\$387,127	\$414,715	\$424,400	\$425,682	\$435,378	\$434,971	\$444,525	\$448,276	\$483,992	\$539,036	\$611,154	\$629,489	\$648,373	\$667,824



TOTAL FOUR YEAR ESTIMATED MEMBER COSTS:  
RECIPROCAL BORROWING OPTION 1 (CURRENT MODEL)

Library	ILS Balance	Cataloging Balance	Rec Borrowing Balance	Resource Exp	hoopla Exp (est)	Balance
Brown Deer	\$ (21,812)	\$ (39,543)	\$ (12,317)	\$ -	\$ 20,555	\$ (53,115)
Cudahy	\$ (31,086)	\$ (55,135)	\$ (26,828)	\$ -	\$ 28,283	\$ (84,765)
Franklin	\$ (49,177)	\$ (69,116)	\$ (6,766)	\$ -	\$ 89,824	\$ (35,235)
Greendale	\$ (37,357)	\$ (38,389)	\$ (2,733)	\$ -	\$ 41,378	\$ (37,101)
Greenfield	\$ (48,715)	\$ (52,502)	\$ (6,167)	\$ -	\$ 66,687	\$ (40,698)
Hales Crns.	\$ (17,215)	\$ (27,666)	\$ (7,681)	\$ -	\$ 24,050	\$ (28,512)
Milwaukee	\$ (325,613)	\$ (181,632)	\$ -	\$ (89,156)	\$ 849,809	\$ 253,408
North Shore	\$ (44,177)	\$ (44,218)	\$ -	\$ -	\$ 117,100	\$ 28,705
Oak Creek	\$ (45,049)	\$ (52,678)	\$ (2,183)	\$ -	\$ 89,068	\$ (10,842)
Saint Francis	\$ (35,047)	\$ (41,506)	\$ (7,500)	\$ -	\$ 26,285	\$ (57,769)
Shorewood	\$ (30,325)	\$ (57,943)	\$ (11,215)	\$ -	\$ 77,736	\$ (21,747)
South Milwaukee	\$ (21,001)	\$ (48,584)	\$ -	\$ -	\$ 41,866	\$ (27,719)
Wauwatosa	\$ (90,017)	\$ (124,344)	\$ (36,926)	\$ -	\$ 218,618	\$ (32,670)
West Allis	\$ (56,864)	\$ (98,372)	\$ (27,746)	\$ -	\$ 81,671	\$ (101,311)
Whitefish Bay	\$ (38,365)	\$ (41,559)	\$ (8,664)	\$ -	\$ 69,646	\$ (18,942)
Total	\$ (891,820)	\$ (973,187)	\$ (156,727)	\$ (89,156)	\$ 1,842,578	\$ (268,312)



TOTAL FOUR YEAR ESTIMATED MEMBER COSTS:  
RECIPROCAL BORROWING OPTION 2 (COLLECTION DEV GRANTS)

Library	ILS Balance	Cataloging Balance	Dev Grant Balance	Resource Exp	hoopla Exp (est)	Balance
Brown Deer	\$ (21,812)	\$ (39,543)	\$ 15,816	\$ -	\$ 20,555	\$ (24,983)
Cudahy	\$ (31,086)	\$ (55,135)	\$ 37,462	\$ -	\$ 28,283	\$ (20,475)
Franklin	\$ (49,177)	\$ (69,116)	\$ (10,498)	\$ -	\$ 89,824	\$ (38,967)
Greendale	\$ (37,357)	\$ (38,389)	\$ (6,471)	\$ -	\$ 41,378	\$ (40,838)
Greenfield	\$ (48,715)	\$ (52,502)	\$ (6,744)	\$ -	\$ 66,687	\$ (41,274)
Hales Crns.	\$ (17,215)	\$ (27,666)	\$ 7,643	\$ -	\$ 24,050	\$ (13,188)
Milwaukee	\$ (325,613)	\$ (181,632)	\$ (201,033)	\$ (89,156)	\$ 849,809	\$ 52,375
North Shore	\$ (44,177)	\$ (44,218)	\$ (13,099)	\$ -	\$ 117,100	\$ 15,605
Oak Creek	\$ (45,049)	\$ (52,678)	\$ (16,475)	\$ -	\$ 89,068	\$ (25,135)
Saint Francis	\$ (35,047)	\$ (41,506)	\$ 3,396	\$ -	\$ 26,285	\$ (46,872)
Shorewood	\$ (30,325)	\$ (57,943)	\$ 4,497	\$ -	\$ 77,736	\$ (6,035)
South Milwaukee	\$ (21,001)	\$ (48,584)	\$ (13,053)	\$ -	\$ 41,866	\$ (40,772)
Wauwatosa	\$ (90,017)	\$ (124,344)	\$ 18,584	\$ -	\$ 218,618	\$ 22,841
West Allis	\$ (56,864)	\$ (98,372)	\$ 22,199	\$ -	\$ 81,671	\$ (51,365)
Whitefish Bay	\$ (38,365)	\$ (41,559)	\$ 1,047	\$ -	\$ 69,646	\$ (9,230)
Total	\$ (891,820)	\$ (973,187)	\$ (156,727)	\$ (89,156)	\$ 1,842,578	\$ (268,312)



# TOTAL FIVE YEAR ESTIMATED SYSTEM COSTS

Changes to System Expenditures	2025	2026	2027	2028	2029
Additional State Aid	\$ 159,589	\$ 159,589	\$ 159,589	\$ 159,589	\$ 159,589
All Sierra ILS Costs	\$ (213,169)	\$ (219,564)	\$ (226,151)	\$ (232,936)	\$ (239,924)
Additional Cataloging Contract Costs	\$ (225,791)	\$ (237,081)	\$ (248,935)	\$ (261,381)	\$ (274,450)
Data Analyst Costs	\$ -	\$ -	\$ (120,760)	\$ (123,175)	\$ (125,639)
hoopla Costs	\$ 289,440	\$ 289,440	\$ 289,440	\$ 289,440	\$ 289,440
Balance Additional Needed	\$ 10,069	\$ (7,616)	\$ (146,817)	\$ (168,463)	\$ (190,984)
% State Aid Point Difference		0	-3	-4	31
					-4



# NEXT STEPS

- Review the proposals with your library boards and submit feedback using the form here by September 12.  
<https://form.jotform.com/242106300896048>
- MCFLS Director will collate feedback from member library directors and boards for consideration at the MCFLS Board meeting on September 19.
- Additional changes (if any) to agreement drafts made and shared with LDAC and library boards immediately after the MCFLS Board meeting.



# 2025-2028 MCFLS MEMBERSHIP AGREEMENTS

## EXECUTIVE SUMMARY

### Current Membership Agreements (2020-2024)

- Expiration: December 31, 2024
- Agreements:
  - ILS Resource Sharing and Technology (IRST): Signed by all members.
  - Resource Library Agreement: Signed by MPL.
  - Bibliographic and Database Maintenance: Signed by MPL.
- Funding Distribution:
  - 50.25% of state aid allocated as follows:
    - Reciprocal Borrowing: 35%
    - Resource Library: 6.25%
    - Bibliographic and Database Maintenance: 9%

### Influences on New Membership Agreements (2025-2028)

- MCFLS Strategic Plan
  - Data Analyst Assistance
  - System Staff Training and Development
- Trustee and Member Feedback
- Shifts in MCFLS Role and Rising Content Costs (e.g., hoopla)

### Cost Assumptions

- State aid assumed flat but likely to increase.
- ILS and Cataloging costs projected to rise 3% annually.
- Hoopla costs estimated to increase 5% annually.
- Full-time data analyst estimated to cost \$120,000 starting in 2027 with 2% annual COLA increases.



### Proposed Changes to Agreements

- Infrastructure Costs: MCFLS to cover costs related to Sierra ILS and Cataloging, saving members \$1,865,007 over four years.
- Hoopla Costs: No longer subsidized by MCFLS, estimated member costs \$1,842,578 over four years.
- Reciprocal Borrowing:
  - Option 1: Maintain 35% of state aid in 2026, reduce to 33% in 2027/2028, and 31% in 2029.
  - Option 2: Reimagine as Collection Development Grants, rewarding net lenders and contributors to the collection using 75% net positive transactions and 25% items added as metrics.
- Majority Preference: Option 2 selected by majority of MCFLS Trustees on July 18.

### Possible Contract Language Updates (TBD by LDAC)

- Maintenance of effort clause for member investment in collections.
- Use circulating library's loan rules for checkouts.
- System-wide fee card concept.
- Additional changes due to MCFLS absorbing ILS and Cataloging costs.

### Resource Library Agreement

- Percentage of state aid remains at 6.25%.
- Formalization of MPL's liaison leadership for Youth and Inclusive Services.

### Cataloging Contract

- Extensive rewrite with MPL, increasing accountability and reporting.
- MCFLS to take over complete payment of the contract.

### Next Steps

- Library boards to review proposals and submit feedback by September 12 [using the form here](#).
- Feedback to be collated for consideration at the MCFLS Board meeting on September 19.
- Post-meeting, changes to agreement drafts will be shared with LDAC and library boards.





## 2025-2028 Member Agreements

### Member Library Feedback Submission Form

The MCFLS Board is soliciting feedback from member libraries regarding potential changes to member agreements that expire on December 31, 2024, particularly the ILS, Resource Sharing and Technology agreement. Two other agreements (Resource Library and Cataloging) are made between MPL and MCFLS for additional services provided to the system.

[Timeline for Agreements](#)

[Existing Agreements](#)

[Executive Summary of Proposed Changes](#)

[Slidedeck used for July 30 LDAC Meeting](#)

[Excel File used for data in slidedeck](#)

Please note:

- Only one form entry should be made per member library. Responses should be made in collaboration with the library board and any other stakeholders.
- Form submissions are due September 30.
- The MCFLS Director will collate responses for board consideration in October and communicate with directors and boards with additional changes.

**Member Library \***

Please Select



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## ILS, Resource Sharing and Technology Agreement

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The MCFLS Board is proposing that the system take on all ILS and Cataloging agreement costs with adjustments to agreement amounts, but shift costs to members for hoopla and allow them to make their own decisions regarding investments in that collection. Does your library agree with that approach? Please expand on your choice directly below these options.

- ☐ Yes
- ☐ No
- ☐ Not Sure

Additional comments or rationale regarding your choice above

The MCFLS Board is considering two options regarding the current reciprocal borrowing structure. Which option does your library prefer?

- ☐ Option 1. Keep the reciprocal borrowing formula unchanged and keep percentage at 35% of state aid in 2026, but reduce percentages to 33% in 2027/2028 and 31% in 2029 to pay for infrastructure costs.
- ☐ Option 2. Use percentages in Option 1, but re-imagine these payments as Collection Development Grants using a formula of 75% reciprocal borrowing net positive transactions and 25% items added to the collection in a given year. Rationale: Reward net lenders and libraries that contribute to overall collection development for the system and remove the winners/losers scenario currently in place.

Additional comments regarding the two options above

Which of the following changes to language within the ILS, Resource Sharing and Technology agreement would your library support? Please add others you would like the system to consider.



- ☐ Adding a maintenance of effort clause requiring members to maintain investments in their collections.
- ☐ Using loan rules of the circulating library rather than the owning library when materials are checked out. A majority of systems in Wisconsin use this model to improve and simplify the user experience for patrons.
- ☐ A system-wide fee card issued by all libraries, allowing access to all physical collections in the county, and where owning libraries are reimbursed for use of their materials.
- ☐ Other

**Additional comments regarding the MCFLS agreements**

**Name of Person Filling Out this Form \***

**Email \***

example@example.com

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Review Answers



To: Whitefish Bay Public Library Board of Trustees  
From: Nyama Y. Reed, Library Director  
Date: August 27, 2024 Meeting  
Re: Commemorative Naming Policy – Review 2



WFB Public Library Mission Statement

The Whitefish Bay Public Library, as a cornerstone of the community, is dedicated to connecting all people, inspiring a love of learning, and providing access to ideas, information, and resources.

Background

The Library Board discussed a draft of a Commemorative Naming Policy compiled by Trustee Flannery at the July meeting. An updated draft of said policy will be presented for discussion at the August meeting.

Action



To: Whitefish Bay Public Library Board of Trustees  
From: Nyama Y. Reed, Library Director  
Date: August 27, 2024 Meeting  
Re: Faves for Fines



### WFB Public Library Mission Statement

The Whitefish Bay Public Library, as a cornerstone of the community, is dedicated to connecting all people, inspiring a love of learning, and providing access to ideas, information, and resources.

### Background

September is Library Card Month, "a time when the American Library Association and libraries across the country remind parents that a library card is the most important school supply of all. The observance was launched in 1987 to meet the challenge of then Secretary of Education William J. Bennett who said: 'Let's have a national campaign...every child should obtain a library card - and use it.' Since then, thousands of public and school libraries join each fall in a national effort to ensure every child does just that."

<http://www.ala.org/conferencesevents/celebrationweeks/card>

In previous years, the library:

- ❖ waived the \$2 fee for a replacement library card
- ❖ offered "Food for Fines," which entailed patrons receiving \$1 off fines for each item of food donated, up to \$5.
  - Only WFBPL overdue fines may be waived, not fines for other libraries' materials nor for replacement costs of lost items.

Impact:

- ❖ positive feedback from patrons evident in their additional giving of food items beyond their "fines" payment, patrons cleared fines from their accounts and it gave staff a feeling of "doing something good" for public relations.
- ❖ waived revenue is nominal, averaging \$200 per year.

### Faves for Fines

Other libraries have transitioned to waiving fines if patrons show pictures of babies or puppies, which garners positive attention. WFBPL would like to embrace this trend with Faves for Fines.

- ❖ Patrons will answer questions on small cut-out paper shapes with the answer to their favorite book, author, etc.
- ❖ The Library will waive up to \$5.00 in fines on WFBPL items.
- ❖ The Faves will be taped on the windows to the sides of the lobby doors for people to read as they enter and exit the library.

<https://www.washingtonpost.com/lifestyle/2024/06/07/library-pet-photo-damaged-book/>

<https://www.nytimes.com/2024/03/04/us/massachusetts-library-fines-cat-picture.html>

There may be some concerns that the Library will not receive food to donate. In years past, we noticed the food was often old or expired. We could put out a donation at the circulation desk during September and donate the proceeds to a food bank.

### Recommendation

It is recommended the WFBPL Board of Trustees Faves for Fines to occur in September 2024.



To: Whitefish Bay Public Library Board of Trustees  
From: Nyama Y. Reed, Library Director  
Date: August 27, 2024 Meeting  
Re: LibraryIQ - Update



#### WFB Public Library Mission Statement

The Whitefish Bay Public Library, as a cornerstone of the community, is dedicated to connecting all people, inspiring a love of learning, and providing access to ideas, information, and resources.

#### Background

At the July Board meeting, Director Reed reviewed LibraryIQ with the Board, who then asked him to find answers to their questions and return to the topic in August.

1. How does LibraryIQ price their product? Collection Budget (Print, Electronic, Other), Service Population, Number of Locations, ILS, Additional Technology Integration Points
2. How many users can login simultaneously? If required, Library IQ would provide a login for every employee.
3. If we don't renew after 1 year, what happens to our data? All of the data is deleted from our servers.
4. Are other users in WI, the Midwest, or Nationally that are comparable for size, circulation, or budget? Yes
5. Of your members, how many (or what %) do not renew? Less than 5%
6. Can we negotiate a lower price? No, this is the lowest they are willing to go.

#### Current Quote:

- 1-year agreement
- Initial Term: 11/1/24 – 10/31/25
- Courtesy time: execution date thru 11/1/24
- Invoice 11/1/24 (net-30)
- \$10,000 annual software
- Waived Costs
  - CommunityIQ Demographics – waive \$2,600 cost
  - Implementation Fee – waive \$2,500 cost
- Includes: CollectionIQ, DiversityIQ, MetricsIQ, CommunityIQ Demographics, and Report Builder

#### Measures of Success

- Collection Quality: Enhanced quality of the library's collection through the inclusion of more diverse and relevant materials, improved alignment with patron preferences, and more effective acquisition processes. This leads to a collection that better meets the needs and interests of library users.
- Cost-Effectiveness: Demonstrated value through reduced costs in acquiring new materials and a decrease in manual tasks. This results in more efficient use of the library's budget and resources, allowing for better allocation of funds and improved financial management.
- Operational Efficiency: More streamlined workflows and a reduction in the time required for collection development tasks. This increased efficiency helps staff to focus more on other important activities, such as programming and user services, enhancing overall productivity within the library.
- Data-Driven Insights: The software's ability to analyze and interpret collection data to provide actionable insights and trends. These insights assist in making informed decisions about collection management and strategy, leading to more effective and targeted improvements.
- Data Accuracy and Reporting: Consistent and precise collection of data, coupled with comprehensive reporting capabilities. This ensures that library staff can make well-informed decisions and plan strategically based on accurate and detailed information.

#### Recommendation

It is recommended the WFBPL Board of Trustees approve a 1-year subscription to LibraryIQ with funding from Fund 13 Fund Balance.



## Manhattan-Elwood Public Library District (IL)

I'm happy to answer your questions about LibraryIQ.

### **1) How long have you subscribed to LibraryIQ?**

We have had LibraryIQ for about 15 months, since about May of 2023.

### **2) Which of its features do you use monthly or annually?**

We regularly use the Collection Analyze tools. It helps us to create displays and market materials. We use collection circulation/Collection Discover regularly helps us see what's trending to make more informed purchasing decisions and determine what authors, genres, series, etc are trending. It is much easier to do this with LibraryIQ than with our ILS. I have found using the DEI recommendations very helpful as well. It is also handy if you want to make displays for heritage months, pride, etc.

We are about to open a second branch, and the Collection Maintain Balance will help us determine how many items we can reasonable transfer. We also use the Dead On Arrival List to help market titles that are not finding their audience.

### **3) How does it make work easier for you or your staff?**

Most of our staff cannot run reports through our ILS, so it is a quick and easy way to get information without having to constantly run reports. It's great for information snapshots (like I want to compare two days of circulation, or want to see how we are doing this month without running a whole report. It makes keeping displays fresh and merchandising far easier.

I think overall the thing that makes it worth the investment is the time it saves our staff and myself. It does a lot of the data mining for us, so we don't have to comb through spreadsheets and make educated guesses.

### **4) What makes it worth renewing in your opinion?**

We renewed it for another year and I imagine we will again. I think that the key is to make sure that staff really know how to use it, you have a plan for who is utilizing it and what they are utilizing it for. If staff doesn't know how to use it, they won't bother.

I hope my answers are helpful. If you have any other questions please let me know

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## Irondale Public Library (AL)

I'm glad you reached out! I can't stress enough how much we love LibraryIQ. Other than Overdrive and hoopla, I consider it our best digital investment.

### **1) How long have you subscribed to LibraryIQ?**

We've only been using LibraryIQ for one year, but we are renewing.

### **2) Which of its features do you use monthly or annually?**

We primarily rely on the Report Builder tool. We use that one several times a month. There are some other features that I think will be very helpful for us that I just haven't gotten around to trying yet. The problem is that the whole reason we love IQ is that we're so short on time, but because we're short on time, I don't always prioritize starting to incorporate new reports.

### **3) How does it make work easier for you or your staff?**

It's way faster than running the same reports through our ILS (Sierra). We also have Decision Center, which is Innovative's closest thing to IQ, but IQ is a lot more versatile and customizable.



For us, it's been a gamechanger for collection development. We had a period where weeding and strategic development weren't a priority, so our nonfiction was in an especially bad state. But with so many other responsibilities (regular stuff, plus we're in the middle of building a new library, so it's extra hectic), it was hard to carve out the time to tackle the issue. But once we started using IQ, it's been so fast to do weeding lists, compare what different weeding criteria would affect, and evaluate the collection post-weeding that time isn't even an issue. The only thing stopping us from overhauling all of it at once is just storage for the weeded books. Even beyond weeding, it makes it easy to evaluate what kind of books are working well, what we should invest more/less in, what areas we should maybe try different types of books in, etc.

We also tried a new service last year for readers advisory, and it didn't live up to expectations for us. So I used IQ to compensate for it. IQ gave me better lists of new books on various topics, and in that context, it was actually easier to search by different criteria than in our ILS.

Because we're planning a move, we're also starting to use it to plan for the future. It's easy to see the turnover rates and such for each collection, so it's helpful in planning shelving allocation for our new building.

None of these are things we didn't already have the ability to do. We just weren't doing them nearly as often before because of how time-consuming they were. And I should say that IQ doesn't 100% replace the Create Lists feature in our ILS. We still use that sometimes. But we greatly prefer IQ whenever we can use it.

**4) What makes it worth renewing in your opinion?**

The additional amount of useful work we've been able to get done is like having an advanced part-time employee. Library IQ isn't cheap, but it's way more affordable than that. The value has exceeded our expectations.

If there is any other info that would be helpful to you, please let me know!