

LIBRARY BOARD MEETING
 Tuesday October 21, 2025, 6:30pm
 Location: 2nd Floor Program Room



STREAM VIA ZOOM

<https://us02web.zoom.us/j/85986735998?pwd=SS9MRkJQOVBRcE0rRTN5VEtBOGZpQT09>

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, 2024-2025	
5. Claire Flannery, Member, 2020-2026	
6. Nikki DeGuire, Member, 2024-2027	
7. Ellie Gettinger, Member, 2019-2028	
Staff	
Nyama Reed, Library 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 September 30, 2025 meeting b. Finance Report Through September 30, 2025 c. Monthly Statistics	Motion			
	4.	Workforce Snapshot: Survey, Compensation & Longevity	Discuss			
	5.	Review Draft Staff Evaluation Forms	Motion			
	6.	Trustee Training: Trustee Handbook Chapters 10, 11, 13, 25	Discuss			
	7.	Director's Report	Discuss			
		ADJOURNMENT	Motion			

BOARD MEETINGS

- November 3, 2025, Monday, 6:00-8:30 pm - Village of WFB Board, @Village Hall
 - Detailed 2026 Budget Review
- November 10, 2025, Monday, 6:00-7:15 pm – Foundation Board, @Library
- November 17, 2025, Monday, 6:00-8:30 pm - Village of WFB Board, @Village Hall
 - Public Hearing on 2026 Budget; Board Budget Adoption
- November 18, 2025, Tuesday, 6:30-8:30 pm - Library Board, @Library
- November 19, 2025, Tuesday, 6:00-7:15 pm - Friends of the Library Board, @Library

10/16/2025 01:22 PM

User: N.Reed

DB: Whitefish Bay

REVENUE AND EXPENDITURE REPORT FOR WHITEFISH BAY

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PERIOD ENDING 09/30/2025

% Fiscal Year Completed: 74.79

GL NUMBER	DESCRIPTION	END BALANCE		2025	YTD BALANCE		AVAILABLE		% BDGT USED
		NORMAL	(ABNORMAL)	ORIGINAL BUDGET	NORMAL	(ABNORMAL)	NORMAL	(ABNORMAL)	
Fund 13 - Library Special Revenue Fund									
Revenues									
Function: Unclassified									
Dept 00000									
Taxes									
13-00000-41100	Property Taxes	900,526.00		930,490.00	930,490.00		0.00		100.00
Taxes		900,526.00		930,490.00	930,490.00		0.00		100.00
Intergovernmental Revenue									
13-00000-43792	Other Grants	3,300.00		2,000.00	1,000.00		1,000.00		50.00
Intergovernmental Revenue		3,300.00		2,000.00	1,000.00		1,000.00		50.00
Intergovernmental Revenue									
13-00000-43793	MCFLS Member Reserve Fund	58,091.00		75,948.00	76,193.00		(245.00)		100.32
Intergovernmental Revenue		58,091.00		75,948.00	76,193.00		(245.00)		100.32
Fines, Fees, Penalties									
13-00000-45209	LIBRARY FINES	22,740.18		25,000.00	18,029.05		6,970.95		72.12
13-00000-45210	Library Replacement Cards	68.60		150.00	116.70		33.30		77.80
13-00000-45224	LIBRARY DAMAGE RECOVERY	(11.95)		0.00	0.00		0.00		0.00
Fines, Fees, Penalties		22,796.83		25,150.00	18,145.75		7,004.25		72.15
Public Charges for Services									
13-00000-46712	LIBRARY ROOM RENT	4,155.45		5,500.00	2,385.00		3,115.00		43.36
13-00000-46713	LIBRARY COPY AND FAX FEES	6,368.96		5,500.00	5,163.89		336.11		93.89
13-00000-46715	MISCELLANEOUS REVENUE	861.93		0.00	0.00		0.00		0.00
Public Charges for Services		11,386.34		11,000.00	7,548.89		3,451.11		68.63
Miscellaneous Revenue									
13-00000-48501	LIBRARY DONATIONS	4,330.00		2,000.00	2,601.00		(601.00)		130.05
Miscellaneous Revenue		4,330.00		2,000.00	2,601.00		(601.00)		130.05
Total Dept 00000		1,000,430.17		1,046,588.00	1,035,978.64		10,609.36		98.99
Total - Function Unclassified		1,000,430.17		1,046,588.00	1,035,978.64		10,609.36		98.99
TOTAL REVENUES		1,000,430.17		1,046,588.00	1,035,978.64		10,609.36		98.99
Expenditures									
Function: Unclassified									
Dept 93000 - LIBRARY SALARIES									
Unclassified									
13-93000-50100	Salaries	588,245.06		616,620.00	442,613.01		174,006.99		71.78
13-93000-50150	FICA Tax	44,553.57		47,171.00	33,442.29		13,728.71		70.90
13-93000-50160	Health/Dental Insurance Premium	57,446.28		65,106.00	48,917.16		16,188.84		75.13
13-93000-50161	Health Insurance Deductible (Direct Pay)	1,945.00		1,450.00	3,652.50		(2,202.50)		251.90
13-93000-50170	Retirement Contribution - ER portion	30,561.21		31,430.00	23,040.32		8,389.68		73.31
13-93000-50180	Group Life Insurance Premium	1,499.30		1,656.00	1,257.07		398.93		75.91
13-93000-50181	Disability Insurance Premium	0.00		1,656.00	0.00		1,656.00		0.00

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REVENUE AND EXPENDITURE REPORT FOR WHITEFISH BAY

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PERIOD ENDING 09/30/2025

% Fiscal Year Completed: 74.79

GL NUMBER	DESCRIPTION	END BALANCE 12/31/2024		2025	YTD BALANCE 09/30/2025		AVAILABLE BALANCE		% BDGT USED
		NORMAL	(ABNORMAL)	ORIGINAL BUDGET	NORMAL	(ABNORMAL)	NORMAL	(ABNORMAL)	
Fund 13 - Library Special Revenue Fund									
Expenditures									
Unclassified		724,250.42		765,089.00		552,922.35		212,166.65	72.27
Total Dept 93000 - LIBRARY SALARIES		724,250.42		765,089.00		552,922.35		212,166.65	72.27
Dept 93200 - LIBRARY ADM EXP									
Unclassified									
13-93200-50190	Training/Meetings/Travel	6,223.56		4,500.00		1,595.98		2,904.02	35.47
13-93200-50191	Membership Dues	1,088.10		1,200.00		841.78		358.22	70.15
13-93200-50194	Personnel Related Expenses	803.45		700.00		1,214.07		(514.07)	173.44
13-93200-50220	Attorney Contract	0.00		0.00		2,309.00		(2,309.00)	100.00
13-93200-50250	Utilities	49,650.15		52,000.00		38,604.22		13,395.78	74.24
13-93200-50251	Telephone/Internet	6,443.93		6,000.00		3,366.17		2,633.83	56.10
13-93200-50300	Office Supplies	2,208.51		2,000.00		1,597.99		402.01	79.90
13-93200-50301	Printing/Publishing/Copies	450.00		500.00		0.00		500.00	0.00
13-93200-50302	Postage	10.89		25.00		0.69		24.31	2.76
13-93200-50303	Covid Supplies	27.98		300.00		97.10		202.90	32.37
13-93200-50360	Building Maintenance	22,046.99		13,000.00		6,204.28		6,795.72	47.73
13-93200-50428	Library Director Designated	51,721.93		0.00		0.00		0.00	0.00
13-93200-50760	Sales Tax	342.52		500.00		203.76		296.24	40.75
Unclassified		141,018.01		80,725.00		56,035.04		24,689.96	69.41
Total Dept 93200 - LIBRARY ADM EXP		141,018.01		80,725.00		56,035.04		24,689.96	69.41
Dept 93300 - LIBRARY EQUIPMENT									
Unclassified									
13-93300-50240	IT Support Contract Services	28,279.78		28,000.00		32,584.68		(4,584.68)	116.37
13-93300-50311	Copier Maintenance/Repair	3,176.16		3,500.00		2,951.97		548.03	84.34
13-93300-50312	Material Processing/Repairs	3,481.34		3,700.00		3,691.94		8.06	99.78
13-93300-50350	Maintenance Service & Supplies	33,960.00		34,050.00		17,290.00		16,760.00	50.78
13-93300-50351	Custodial Supplies	3,785.06		6,000.00		2,035.31		3,964.69	33.92
13-93300-50360	Building Maintenance	0.00		0.00		2,690.00		(2,690.00)	100.00
13-93300-50400	MCFLS Supplies	1,955.74		1,600.00		834.74		765.26	52.17
Unclassified		74,638.08		76,850.00		62,078.64		14,771.36	80.78
Total Dept 93300 - LIBRARY EQUIPMENT		74,638.08		76,850.00		62,078.64		14,771.36	80.78
Dept 93400 - LIBR PROG/SERVICES									
Unclassified									
13-93400-50401	MCFLS Membership	15,544.00		22,674.00		7,148.00		15,526.00	31.53
13-93400-50402	Programs - Adult	0.00		500.00		162.98		337.02	32.60
13-93400-50403	Programs - Children	507.74		500.00		234.43		265.57	46.89
13-93400-50415	Programs - Young Adults	0.00		250.00		0.00		250.00	0.00
Unclassified		16,051.74		23,924.00		7,545.41		16,378.59	31.54
Total Dept 93400 - LIBR PROG/SERVICES		16,051.74		23,924.00		7,545.41		16,378.59	31.54

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REVENUE AND EXPENDITURE REPORT FOR WHITEFISH BAY
PERIOD ENDING 09/30/2025
% Fiscal Year Completed: 74.79

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GL NUMBER	DESCRIPTION	END BALANCE 12/31/2024		2025 ORIGINAL	YTD BALANCE 09/30/2025		AVAILABLE BALANCE		% BDGT USED
		NORMAL	(ABNORMAL)	BUDGET	NORMAL	(ABNORMAL)	NORMAL	(ABNORMAL)	
Fund 13 - Library Special Revenue Fund									
Expenditures									
Dept 93500 - LIBRARY COLLECTIONS									
Unclassified									
13-93500-50410	Library Collection Materials	103,580.95		100,000.00	78,155.52		21,844.48		78.16
Unclassified		103,580.95		100,000.00	78,155.52		21,844.48		78.16
Total Dept 93500 - LIBRARY COLLECTIONS		103,580.95		100,000.00	78,155.52		21,844.48		78.16
Total - Function Unclassified		1,059,539.20		1,046,588.00	756,736.96		289,851.04		72.31
TOTAL EXPENDITURES		1,059,539.20		1,046,588.00	756,736.96		289,851.04		72.31
Fund 13 - Library Special Revenue Fund:									
TOTAL REVENUES		1,000,430.17		1,046,588.00	1,035,978.64		10,609.36		98.99
TOTAL EXPENDITURES		1,059,539.20		1,046,588.00	756,736.96		289,851.04		72.31
NET OF REVENUES & EXPENDITURES		(59,109.03)		0.00	279,241.68		(279,241.68)		100.00
BEG. FUND BALANCE		159,209.37		100,100.34	100,100.34				
END FUND BALANCE		100,100.34		100,100.34	379,342.02				
Fund 22 - LIBRARY EXPANSION FUND									
Revenues									
Function: Unclassified									
Dept 00000									
Miscellaneous Revenue									
22-00000-48110	INVESTMENT INCOME	14,798.45		0.00	9,673.98		(9,673.98)		100.00
Miscellaneous Revenue		14,798.45		0.00	9,673.98		(9,673.98)		100.00
Total Dept 00000		14,798.45		0.00	9,673.98		(9,673.98)		100.00
Total - Function Unclassified		14,798.45		0.00	9,673.98		(9,673.98)		100.00
TOTAL REVENUES		14,798.45		0.00	9,673.98		(9,673.98)		100.00
Fund 22 - LIBRARY EXPANSION FUND:									
TOTAL REVENUES		14,798.45		0.00	9,673.98		(9,673.98)		100.00
TOTAL EXPENDITURES		0.00		0.00	0.00		0.00		0.00
NET OF REVENUES & EXPENDITURES		14,798.45		0.00	9,673.98		(9,673.98)		100.00
BEG. FUND BALANCE		73,988.36		88,786.81	88,786.81				
END FUND BALANCE		88,786.81		88,786.81	98,460.79				
TOTAL REVENUES - ALL FUNDS		1,015,228.62		1,046,588.00	1,045,652.62		935.38		99.91

REVENUE AND EXPENDITURE REPORT FOR WHITEFISH BAY
PERIOD ENDING 09/30/2025
% Fiscal Year Completed: 74.79

		END BALANCE	2025	YTD BALANCE	AVAILABLE	
		12/31/2024	ORIGINAL	09/30/2025	BALANCE	% BDGT
GL NUMBER	DESCRIPTION	NORMAL (ABNORMAL)	BUDGET	NORMAL (ABNORMAL)	NORMAL (ABNORMAL)	USED
TOTAL EXPENDITURES - ALL FUNDS		1,059,539.20	1,046,588.00	756,736.96	289,851.04	72.31
NET OF REVENUES & EXPENDITURES		(44,310.58)	0.00	288,915.66	(288,915.66)	100.00
BEG. FUND BALANCE - ALL FUNDS		233,197.73	188,887.15	188,887.15		
END FUND BALANCE - ALL FUNDS		188,887.15	188,887.15	477,802.81		

Date	JNL	Type	DESC	Reference #	AMT	ENC/BDGT CHG	BALANCE	AVAILABLE
Fund 13 Library Special Revenue Fund								
09/01/2025			13-00000-11100 CASH IN BANK		BEG. BALANCE		(453,589.90)	
09/05/2025	PR	CHK	SUMMARY PR 09/05/2025		(25,524.80)		(479,114.70)	
09/05/2025	CD	CHK	SUMMARY CD 09/05/2025		(5,388.43)		(484,503.13)	
09/05/2025	GJ	JE	record tax revenue to funds	6106	930,490.00		445,986.87	
09/05/2025	GJ	JE	Library - stripe monthly deposiit	6109	677.84		446,664.71	
09/08/2025	CR	RCPT	Daily Library Receipts	236962	242.60		446,907.31	
09/09/2025	GJ	JE	Monthly Sales Tax ACH Payment	6126	(12.83)		446,894.48	
09/11/2025	CD	CHK	SUMMARY CD 09/11/2025		(2,718.73)		444,175.75	
09/12/2025	CD	CHK	SUMMARY CD 09/12/2025		(2,772.96)		441,402.79	
09/14/2025	GJ	JE	Nayax deposit	6147	340.26		441,743.05	
09/17/2025	CR	RCPT	Daily Library Receipts	237123	391.67		442,134.72	
09/19/2025	PR	CHK	SUMMARY PR 09/19/2025		(25,438.57)		416,696.15	
09/19/2025	CD	CHK	SUMMARY CD 09/19/2025		(5,303.24)		411,392.91	
09/26/2025	CD	CHK	SUMMARY CD 09/26/2025		(484.11)		410,908.80	
09/29/2025	CR	RCPT	Daily Library Receipts	237263	354.73		411,263.53	
09/30/2025	GJ	JE	Monthly WRS ACH Payment	6079	(2,451.94)		408,811.59	
09/30/2025			13-00000-11100 CASH IN BANK		END BALANCE		408,811.59	
09/01/2025			13-00000-12100 TAXES RECEIVABLE		BEG. BALANCE		930,490.00	
09/05/2025	GJ	JE	record tax revenue to funds	6106	(930,490.00)		0.00	
09/30/2025			13-00000-12100 TAXES RECEIVABLE		END BALANCE		0.00	
09/01/2025			13-00000-21100 ACCOUNTS PAYABLE		BEG. BALANCE		(2,301.60)	
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(L5190172 8/25 AUGUST 2025 STATEMENT		1,009.25		3,310.85	
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(75003750 8/25 AUGUST 2025 STATEMENT		432.43		3,743.28	
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(L4211182 8/2025 AUGUST 2025 STATEMENT		196.81		3,940.09	
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(40023382 8/25 AUGUST 2025 STATEMENT		58.18		3,998.27	
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(L6798382 8/25 AUGUST 2025 STATEMENT		358.29		4,356.56	
09/03/2025	AP	INV	DEMCO/DEMCO TAPE, ADHESIVE & LABEL PROTECTORS	7689286	81.12		4,437.68	
09/03/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD TONER COLLECTION CONTAINER	AR262548	14.00		4,451.68	
09/03/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD BLACK TONER	AR262555	14.00		4,465.68	
09/03/2025	AP	INV	KANOPY, INC./KANOPY, INC. TICKETS & KKIDS	466977	368.05		4,833.73	
09/03/2025	AP	INV	GREATAMERICA FINANCIAL SVCS/GREATAMERI(39966559 STANDARD PAYMENT		101.00		4,934.73	
09/03/2025	AP	INV	INGRAM LIBRARY SERVICES/INGRAM LIBRARY 20AC678 8/25 AUGUST 2025 STATEMENT		2,548.10		7,482.83	
09/03/2025	AP	INV	KATIE KIEKHAEFER/KATIE KIEKHAEFER MILEAGE FOR CONFERENCES IN MADISON	9/3/2025	207.20		7,690.03	
09/05/2025	CD	CHK	SUMMARY CD 09/05/2025		(5,388.43)		2,301.60	
09/08/2025	AP	INV	BIBLIOTHECA, LLC/BIBLIOTHECA, LLC LICENSE FEE, RFID WORKSTATIONS, & SOFTV	INV-US82470	1,905.33		4,206.93	

Date	JNL	Type	DESC	Reference #	AMT	ENC/BDGT CHG	BALANCE	AVAILABLE
13-00000-21100 ACCOUNTS PAYABLE					(Continued)			
09/08/2025	AP	INV	WISCONSIN LIBRARY ASSOCIATION/WISCONSII23664 2024 WLA ANNUAL CONFERENCE - T HOGE		300.00		4,506.93	
09/08/2025	AP	INV	WISCONSIN LIBRARY ASSOCIATION/WISCONSII23616 2024 WLA CONFERENCE - N REED		395.00		4,901.93	
09/08/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE 6042070403 FACIAL TISSUE		30.83		4,932.76	
09/08/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE 6042070405 PAPER TOWEL & TOILET PAPER		141.80		5,074.56	
09/10/2025	AP	INV	SPECTRUM ENTERPRISE/SPECTRUM ENTERPRISI6207 MONTHLY CHARGES		107.15		5,181.71	
09/10/2025	AP	INV	SPECTRUM ENTERPRISE/SPECTRUM ENTERPRISI7999 MONTHLY CHARGES		309.98		5,491.69	
09/11/2025	CD	CHK	SUMMARY CD 09/11/2025		(2,718.73)		2,772.96	
09/12/2025	CD	CHK	SUMMARY CD 09/12/2025		(2,772.96)		0.00	
09/16/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD AR263224 LIBRARY COPIER 8/3 - 9/2/20285		113.50		113.50	
09/16/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD AR263223 LIBRARY COPIER 8/3 - 9/2/2025		28.22		141.72	
09/16/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE 6019966102 TOILET PAPER		69.70		211.42	
09/16/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE 6019966104 FACIAL TISSUE		53.74		265.16	
09/16/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE 6042070402 COPY PAPER		200.76		465.92	
09/17/2025	AP	INV	YVETTE NIKOLOVA/YVETTE NIKOLOVA 9/15/2025 WORK PERMIT APPLICATION FEE		10.00		475.92	
09/18/2025	AP	INV	SECURIAN FINANCIAL GROUP, INC./SECURIAI045702 - OCT 20 OCTOBER PREMIUMS		142.08		618.00	
09/18/2025	AP	INV	DELTA DENTAL OF WISCONSIN/DELTA DENTAI2415077 OCTOBER 2025 PREMIUMS		251.68		869.68	
09/18/2025	AP	INV	UNITED HEALTHCARE/UNITED HEALTHCARE 177474387616 OCTOBER 2025 PREMIUMS		4,433.56		5,303.24	
09/19/2025	CD	CHK	SUMMARY CD 09/19/2025		(5,303.24)		0.00	
09/23/2025	AP	INV	CAITLIN FORCIEA/CAITLIN FORCIEA 9/18/2025 REFUND OF BOOK REPLACEMENT		75.64		75.64	
09/23/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD AR263653 BLACK TONER		14.00		89.64	
09/24/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD AR258675 LIBRARY COPIER 6/3 - 7/2/2025		239.68		329.32	
09/24/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD AR258674 LIBRARY COPIER 6/3 - 7/2/2025		20.90		350.22	
09/24/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE 6043041369 BREAKROOM SUPPLIES		36.79		387.01	
09/24/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE 6043041370 DISINFECTING WIPES		44.24		431.25	
09/24/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE 6043041371 HAND SANITIZER		52.86		484.11	
09/26/2025	CD	CHK	SUMMARY CD 09/26/2025		(484.11)		0.00	
09/29/2025	AP	INV	ROBB GREGG/ROBB GREGG 2025-09 SEPTEMBER 2025 GARDEN		375.00		375.00	
09/29/2025	AP	INV	GALE/GALE 999101414346 MISC BOOKS		52.48		427.48	

Date	JNL	Type	DESC	Reference #	AMT	ENC/BDGT CHG	BALANCE	AVAILABLE
13-00000-21100 ACCOUNTS PAYABLE					(Continued)			
09/29/2025	AP	INV	WE ENERGIES/WE ENERGIES JULY & AUGUST 2025 CHARGES	5627754633	12,667.06		13,094.54	
09/30/2025			13-00000-21100 ACCOUNTS PAYABLE		END BALANCE		(13,094.54)	
13-00000-21550 DEPOSITS/SUSPENSE					BEG. BALANCE		(151.49)	
09/17/2025	CR	RCPT	DEPOSITS/SUSPENSE	237123	7.99		159.48	
09/29/2025	CR	RCPT	DEPOSITS/SUSPENSE	237263	15.00		174.48	
09/30/2025			13-00000-21550 DEPOSITS/SUSPENSE		END BALANCE		(174.48)	
13-00000-24600 DEFERRED REVENUE - TAXES					BEG. BALANCE		(930,490.00)	
09/05/2025	GJ	JE	record tax revenue to funds	6106	(930,490.00)		0.00	
09/30/2025			13-00000-24600 DEFERRED REVENUE - TAXES		END BALANCE		0.00	
13-00000-25199 ACCRUED PAYROLL					BEG. BALANCE		(14,679.90)	
09/30/2025			13-00000-25199 ACCRUED PAYROLL		END BALANCE		(14,679.90)	
13-00000-25200 Health Insurance - PR Deduction					BEG. BALANCE		0.00	
09/18/2025	AP	INV	UNITED HEALTHCARE/UNITED HEALTHCARE OCTOBER 2025 PREMIUMS	177474387616	(4,433.56)		(4,433.56)	
09/19/2025	PR	CHK	SUMMARY PR 09/19/2025		4,433.56		0.00	
09/30/2025			13-00000-25200 Health Insurance - PR Deduction		END BALANCE		0.00	
13-00000-25202 Dental Insurance - PR Deduction					BEG. BALANCE		0.00	
09/18/2025	AP	INV	DELTA DENTAL OF WISCONSIN/DELTA DENTAL OCTOBER 2025 PREMIUMS	2415077	(251.68)		(251.68)	
09/19/2025	PR	CHK	SUMMARY PR 09/19/2025		251.68		0.00	
09/30/2025			13-00000-25202 Dental Insurance - PR Deduction		END BALANCE		0.00	
13-00000-25210 Life Insurance - PR Deduction					BEG. BALANCE		0.00	
09/05/2025	PR	CHK	SUMMARY PR 09/05/2025		142.08		142.08	
09/18/2025	AP	INV	SECURIAN FINANCIAL GROUP, INC./SECURIA OCTOBER PREMIUMS	1045702	(142.08)		0.00	
09/30/2025			13-00000-25210 Life Insurance - PR Deduction		END BALANCE		0.00	
13-00000-25400 WRS Retirement - Payroll Deduction					BEG. BALANCE		(1,559.51)	
09/05/2025	PR	CHK	SUMMARY PR 09/05/2025		1,192.93		2,752.44	
09/19/2025	PR	CHK	SUMMARY PR 09/19/2025		1,220.15		3,972.59	
09/30/2025	GJ	JE	Monthly WRS ACH Payment	6079	(2,451.94)		1,520.65	
09/30/2025			13-00000-25400 WRS Retirement - Payroll Deduction		END BALANCE		(1,520.65)	
13-00000-28100 SURPLUS					BEG. BALANCE		(100,100.34)	

Date	JNL	Type	DESC	Reference #	AMT	ENC/BDGT CHG	BALANCE	AVAILABLE
13-00000-28100 SURPLUS					(Continued)			
09/30/2025			13-00000-28100 SURPLUS		END BALANCE		(100,100.34)	
09/01/2025			13-00000-41100 Property Taxes		BEG. BALANCE		0.00	930,490.00
09/05/2025	GJ	JE	record tax revenue to funds	6106	930,490.00		930,490.00	0.00
09/30/2025			13-00000-41100 Property Taxes		END BALANCE		930,490.00	0.00
09/01/2025			13-00000-43792 Other Grants		BEG. BALANCE		1,000.00	1,000.00
09/30/2025			13-00000-43792 Other Grants		END BALANCE		1,000.00	1,000.00
09/01/2025			13-00000-43793 MCFLS Member Reserve Fund		BEG. BALANCE		76,193.00	(245.00)
09/30/2025			13-00000-43793 MCFLS Member Reserve Fund		END BALANCE		76,193.00	(245.00)
09/01/2025			13-00000-45209 LIBRARY FINES		BEG. BALANCE		16,861.04	8,138.96
09/05/2025	GJ	JE	Library - stripe monthly deposiit	6109	677.84		17,538.88	7,461.12
09/08/2025	CR	RCPT	LIBRARY FINES	236962	161.50		17,700.38	7,299.62
09/17/2025	CR	RCPT	LIBRARY FINES	237123	224.38		17,924.76	7,075.24
09/23/2025	AP	INV	CAITLIN FORCIEA/CAITLIN FORCIEA REFUND OF BOOK REPLACEMENT	9/18/2025	(75.64)		17,849.12	7,150.88
09/29/2025	CR	RCPT	LIBRARY FINES	237263	179.93		18,029.05	6,970.95
09/30/2025			13-00000-45209 LIBRARY FINES		END BALANCE		18,029.05	6,970.95
09/01/2025			13-00000-45210 Library Replacement Cards		BEG. BALANCE		116.70	33.30
09/30/2025			13-00000-45210 Library Replacement Cards		END BALANCE		116.70	33.30
09/01/2025			13-00000-46712 LIBRARY ROOM RENT		BEG. BALANCE		2,385.00	3,115.00
09/30/2025			13-00000-46712 LIBRARY ROOM RENT		END BALANCE		2,385.00	3,115.00
09/01/2025			13-00000-46713 LIBRARY COPY AND FAX FEES		BEG. BALANCE		4,463.43	1,036.57
09/08/2025	CR	RCPT	LIBRARY COPY AND FAX FEES	236962	81.10		4,544.53	955.47
09/14/2025	GJ	JE	Nayax deposit	6147	340.26		4,884.79	615.21
09/17/2025	CR	RCPT	LIBRARY COPY AND FAX FEES	237123	159.30		5,044.09	455.91
09/29/2025	CR	RCPT	LIBRARY COPY AND FAX FEES	237263	119.80		5,163.89	336.11
09/30/2025			13-00000-46713 LIBRARY COPY AND FAX FEES		END BALANCE		5,163.89	336.11
09/01/2025			13-00000-48501 LIBRARY DONATIONS		BEG. BALANCE		2,561.00	(561.00)
09/29/2025	CR	RCPT	LIBRARY DONATIONS	237263	40.00		2,601.00	(601.00)
09/30/2025			13-00000-48501 LIBRARY DONATIONS		END BALANCE		2,601.00	(601.00)

Date	JNL	Type	DESC	Reference #	AMT	ENC/BDGT CHG	BALANCE	AVAILABLE
09/01/2025			13-93000-50100 Salaries		BEG. BALANCE		395,985.53	220,634.47
09/05/2025	PR	CHK	SUMMARY PR 09/05/2025		23,760.02		419,745.55	196,874.45
09/19/2025	PR	CHK	SUMMARY PR 09/19/2025		22,867.46		442,613.01	174,006.99
09/30/2025			13-93000-50100 Salaries		END BALANCE		442,613.01	174,006.99
09/01/2025			13-93000-50150 FICA Tax		BEG. BALANCE		29,918.90	17,252.10
09/05/2025	PR	CHK	SUMMARY PR 09/05/2025		1,764.78		31,683.68	15,487.32
09/19/2025	PR	CHK	SUMMARY PR 09/19/2025		1,758.61		33,442.29	13,728.71
09/30/2025			13-93000-50150 FICA Tax		END BALANCE		33,442.29	13,728.71
09/01/2025			13-93000-50160 Health/Dental Insurance Premium		BEG. BALANCE		43,481.92	21,624.08
09/19/2025	PR	CHK	SUMMARY PR 09/19/2025		5,435.24		48,917.16	16,188.84
09/30/2025			13-93000-50160 Health/Dental Insurance Premium		END BALANCE		48,917.16	16,188.84
09/01/2025			13-93000-50161 Health Insurance Deductible (Direct Pay)		BEG. BALANCE		3,590.00	(2,140.00)
09/19/2025	PR	CHK	SUMMARY PR 09/19/2025		62.50		3,652.50	(2,202.50)
09/30/2025			13-93000-50161 Health Insurance Deductible (Direct Pay)		END BALANCE		3,652.50	(2,202.50)
09/01/2025			13-93000-50170 Retirement Contribution - ER portion		BEG. BALANCE		20,627.24	10,802.76
09/05/2025	PR	CHK	SUMMARY PR 09/05/2025		1,192.93		21,820.17	9,609.83
09/19/2025	PR	CHK	SUMMARY PR 09/19/2025		1,220.15		23,040.32	8,389.68
09/30/2025			13-93000-50170 Retirement Contribution - ER portion		END BALANCE		23,040.32	8,389.68
09/01/2025			13-93000-50180 Group Life Insurance Premium		BEG. BALANCE		1,114.99	541.01
09/05/2025	PR	CHK	SUMMARY PR 09/05/2025		142.08		1,257.07	398.93
09/30/2025			13-93000-50180 Group Life Insurance Premium		END BALANCE		1,257.07	398.93
09/01/2025			13-93200-50190 Training/Meetings/Travel		BEG. BALANCE		693.78	3,806.22
09/03/2025	AP	INV	KATIE KIEKHAEFER/KATIE KIEKHAEFER 9/3/2025		207.20		900.98	3,599.02
			MILEAGE FOR CONFERENCES IN MADISON					
09/08/2025	AP	INV	WISCONSIN LIBRARY ASSOCIATION/WISCONSII23664		300.00		1,200.98	3,299.02
			2024 WLA ANNUAL CONFERENCE - T HOGE					
09/08/2025	AP	INV	WISCONSIN LIBRARY ASSOCIATION/WISCONSII23616		395.00		1,595.98	2,904.02
			2024 WLA CONFERENCE - N REED					
09/30/2025			13-93200-50190 Training/Meetings/Travel		END BALANCE		1,595.98	2,904.02
09/01/2025			13-93200-50191 Membership Dues		BEG. BALANCE		841.78	358.22
09/30/2025			13-93200-50191 Membership Dues		END BALANCE		841.78	358.22
09/01/2025			13-93200-50194 Personnel Related Expenses		BEG. BALANCE		1,204.07	(504.07)
09/17/2025	AP	INV	YVETTE NIKOLOVA/YVETTE NIKOLOVA 9/15/2025		10.00		1,214.07	(514.07)
			WORK PERMIT APPLICATION FEE					

Date	JNL	Type	DESC	Reference #	AMT	ENC/BDGT CHG	BALANCE	AVAILABLE
			13-93200-50194 Personnel Related Expenses		(Continued)			
09/30/2025			13-93200-50194 Personnel Related Expenses		END BALANCE		1,214.07	(514.07)
09/01/2025			13-93200-50220 Attorney Contract		BEG. BALANCE		2,309.00	(2,309.00)
09/30/2025			13-93200-50220 Attorney Contract		END BALANCE		2,309.00	(2,309.00)
09/01/2025			13-93200-50250 Utilities		BEG. BALANCE		25,937.16	26,062.84
09/29/2025	AP	INV	WE ENERGIES/WE ENERGIES JULY & AUGUST 2025 CHARGES	5627754633	12,667.06		38,604.22	13,395.78
09/30/2025			13-93200-50250 Utilities		END BALANCE		38,604.22	13,395.78
09/01/2025			13-93200-50251 Telephone/Internet		BEG. BALANCE		2,949.04	3,050.96
09/10/2025	AP	INV	SPECTRUM ENTERPRISE/SPECTRUM ENTERPRISI6207 MONTHLY CHARGES		107.15		3,056.19	2,943.81
09/10/2025	AP	INV	SPECTRUM ENTERPRISE/SPECTRUM ENTERPRISI7999 MONTHLY CHARGES		309.98		3,366.17	2,633.83
09/30/2025			13-93200-50251 Telephone/Internet		END BALANCE		3,366.17	2,633.83
09/01/2025			13-93200-50300 Office Supplies		BEG. BALANCE		1,360.44	639.56
09/16/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE COPY PAPER	6042070402	200.76		1,561.20	438.80
09/24/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE BREAKROOM SUPPLIES	6043041369	36.79		1,597.99	402.01
09/30/2025			13-93200-50300 Office Supplies		END BALANCE		1,597.99	402.01
09/01/2025			13-93200-50302 Postage		BEG. BALANCE		0.69	24.31
09/30/2025			13-93200-50302 Postage		END BALANCE		0.69	24.31
09/01/2025			13-93200-50303 Covid Supplies		BEG. BALANCE		0.00	300.00
09/24/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE DISINFECTING WIPES	6043041370	44.24		44.24	255.76
09/24/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE HAND SANITIZER	6043041371	52.86		97.10	202.90
09/30/2025			13-93200-50303 Covid Supplies		END BALANCE		97.10	202.90
09/01/2025			13-93200-50360 Building Maintenance		BEG. BALANCE		5,829.28	7,170.72
09/29/2025	AP	INV	ROBB GREGG/ROBB GREGG SEPTEMBER 2025 GARDEN	2025-09	375.00		6,204.28	6,795.72
09/30/2025			13-93200-50360 Building Maintenance		END BALANCE		6,204.28	6,795.72
09/01/2025			13-93200-50760 Sales Tax		BEG. BALANCE		190.93	309.07
09/09/2025	GJ	JE	Monthly Sales Tax ACH Payment	6126	12.83		203.76	11 296.24

Date	JNL	Type	DESC	Reference #	AMT	ENC/BDGT CHG	BALANCE	AVAILABLE
13-93200-50760 Sales Tax					(Continued)			
09/30/2025			13-93200-50760 Sales Tax		END BALANCE		203.76	296.24
13-93300-50240 IT Support Contract Services					BEG. BALANCE		30,679.35	(2,679.35)
09/01/2025								
09/08/2025	AP	INV	BIBLIOTHECA, LLC/BIBLIOTHECA, LLC LICENSE FEE, RFID WORKSTATIONS, & SOFTV	INV-US82470	1,905.33		32,584.68	(4,584.68)
09/30/2025			13-93300-50240 IT Support Contract Services		END BALANCE		32,584.68	(4,584.68)
13-93300-50311 Copier Maintenance/Repair					BEG. BALANCE		2,406.67	1,093.33
09/01/2025								
09/03/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD TONER COLLECTION CONTAINER	AR262548	14.00		2,420.67	1,079.33
09/03/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD BLACK TONER	AR262555	14.00		2,434.67	1,065.33
09/03/2025	AP	INV	GREATAMERICA FINANCIAL SVCS/GREATAMERI STANDARD PAYMENT	(39966559	101.00		2,535.67	964.33
09/16/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD LIBRARY COPIER 8/3 - 9/2/20285	AR263224	113.50		2,649.17	850.83
09/16/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD LIBRARY COPIER 8/3 - 9/2/2025	AR263223	28.22		2,677.39	822.61
09/23/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD BLACK TONER	AR263653	14.00		2,691.39	808.61
09/24/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD LIBRARY COPIER 6/3 - 7/2/2025	AR258675	239.68		2,931.07	568.93
09/24/2025	AP	INV	FORWARD TS, LTD/FORWARD TS, LTD LIBRARY COPIER 6/3 - 7/2/2025	AR258674	20.90		2,951.97	548.03
09/30/2025			13-93300-50311 Copier Maintenance/Repair		END BALANCE		2,951.97	548.03
13-93300-50312 Material Processing/Repairs					BEG. BALANCE		3,610.82	89.18
09/01/2025								
09/03/2025	AP	INV	DEMCO/DEMCO TAPE, ADHESIVE & LABEL PROTECTORS	7689286	81.12		3,691.94	8.06
09/30/2025			13-93300-50312 Material Processing/Repairs		END BALANCE		3,691.94	8.06
13-93300-50350 Maintenance Service & Supplies					BEG. BALANCE		17,290.00	16,760.00
09/01/2025								
09/30/2025			13-93300-50350 Maintenance Service & Supplies		END BALANCE		17,290.00	16,760.00
13-93300-50351 Custodial Supplies					BEG. BALANCE		1,739.24	4,260.76
09/01/2025								
09/08/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE FACIAL TISSUE	6042070403	30.83		1,770.07	4,229.93
09/08/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE PAPER TOWEL & TOILET PAPER	6042070405	141.80		1,911.87	4,088.13
09/16/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE TOILET PAPER	6019966102	69.70		1,981.57	4,018.43
09/16/2025	AP	INV	STAPLES ADVANTAGE/STAPLES ADVANTAGE FACIAL TISSUE	6019966104	53.74		2,035.31	3,964.69
09/30/2025			13-93300-50351 Custodial Supplies		END BALANCE		2,035.31	3,964.69

Date	JNL	Type	DESC	Reference #	AMT	ENC/BDGT CHG	BALANCE	AVAILABLE
09/01/2025			13-93300-50360 Building Maintenance		BEG. BALANCE		2,690.00	(2,690.00)
09/30/2025			13-93300-50360 Building Maintenance		END BALANCE		2,690.00	(2,690.00)
09/01/2025			13-93300-50400 MCFLS Supplies		BEG. BALANCE		834.74	765.26
09/30/2025			13-93300-50400 MCFLS Supplies		END BALANCE		834.74	765.26
09/01/2025			13-93400-50401 MCFLS Membership		BEG. BALANCE		7,148.00	15,526.00
09/30/2025			13-93400-50401 MCFLS Membership		END BALANCE		7,148.00	15,526.00
09/01/2025			13-93400-50402 Programs - Adult		BEG. BALANCE		162.98	337.02
09/30/2025			13-93400-50402 Programs - Adult		END BALANCE		162.98	337.02
09/01/2025			13-93400-50403 Programs - Children		BEG. BALANCE		234.43	265.57
09/30/2025			13-93400-50403 Programs - Children		END BALANCE		234.43	265.57
09/01/2025			13-93500-50410 Library Collection Materials		BEG. BALANCE		73,131.93	26,868.07
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(L5190172 8/25 AUGUST 2025 STATEMENT		1,009.25		74,141.18	25,858.82
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(75003750 8/25 AUGUST 2025 STATEMENT		432.43		74,573.61	25,426.39
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(L4211182 8/2025 AUGUST 2025 STATEMENT		196.81		74,770.42	25,229.58
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(40023382 8/25 AUGUST 2025 STATEMENT		58.18		74,828.60	25,171.40
09/03/2025	AP	INV	BAKER & TAYLOR BOOKS/BAKER & TAYLOR BO(L6798382 8/25 AUGUST 2025 STATEMENT		358.29		75,186.89	24,813.11
09/03/2025	AP	INV	KANOPY, INC./KANOPY, INC. TICKETS & KKIDS	466977	368.05		75,554.94	24,445.06
09/03/2025	AP	INV	INGRAM LIBRARY SERVICES/INGRAM LIBRARY 20AC678 8/25 AUGUST 2025 STATEMENT		2,548.10		78,103.04	21,896.96
09/29/2025	AP	INV	GALE/GALE MISC BOOKS	999101414346	52.48		78,155.52	21,844.48
09/30/2025			13-93500-50410 Library Collection Materials		END BALANCE		78,155.52	21,844.48

WHITEFISH BAY PUBLIC LIBRARY

STATISTICS

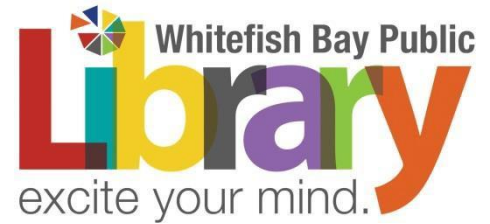
TOTAL CIRCULATION STATISTICS : PHYSICAL + DIGITAL CIRCULATION														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
2023	25,220	23,698	26,785	24,052	23,405	27,942	29,421	28,774	24,085	25,335	25,093	24,403	308,213	233,382
2024	27,157	26,176	27,834	27,040	25,836	28,501	30,612	29,773	25,852	25,949	24,970	24,560	324,260	248,781
2025	28,064	25,723	29,573	27,081	26,850	29,366	31,574	29,144	25,769					253,144
23-24	8%	10%	4%	12%	10%	2%	4%	3%	7%	2%	0%	1%	5%	7%
24-25	3%	-2%	6%	0%	4%	3%	3%	-2%	0%					2%
PHYSICAL CIRCULATION			Easter: Apr 23, Mar 24, Apr 25									-123		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
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	196,921
2024	21,828	21,092	22,149	22,514	20,824	23,851	25,866	25,168	20,877	21,148	20,119	19,705	265,141	204,169
2025	22,715	20,822	23,789	21,711	21,313	23,978	26,022	23,589	20,376					204,315
23-24	3%	6%	-2%	12%	7%	0%	3%	2%	4%	3%	0%	3%	3%	4%
24-25	4%	-1%	7%	-4%	2%	1%	1%	-6%	-2%					0%
DIGITAL CIRCULATION			12%											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
2023	4,084	3,802	4,260	3,904	4,032	3,991	4,245	4,074	4,069	4,794	4,926	5,237	51,418	36,461
2024	5,329	5,084	5,685	4,526	5,012	4,650	4,746	4,605	4,975	4,801	4,851	4,855	59,119	44,612
2025	5,349	4,901	5,784	5,370	5,537	5,388	5,552	5,555	5,393					48,829
23-24	30%	34%	33%	16%	24%	17%	12%	13%	22%	0%	-2%	-7%	15%	22%
24-25	0%	-4%	2%	19%	10%	16%	17%	21%	8%					9%
OVERDRIVE														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
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	28,024
2024	3,738	3,522	3,965	3,334	3,488	3,291	3,427	3,217	3,442	3,386	3,309	3,232	41,351	31,424
2025	3,841	3,387	4,135	3,800	3,937	3,841	3,988	3,879	3,808					34,616
23-24	21%	21%	20%	10%	13%	7%	2%	1%	15%	1%	-6%	-12%	7%	12%
24-25	3%	-4%	4%	14%	13%	17%	16%	21%	11%					10%
OVERDRIVE MAGAZINES														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
2023	289	293	334	264	296	273	254	282	484	798	863	851	5,281	2,769
2024	862	878	912	486	790	632	535	556	725	661	674	663	8,374	6,376
2025	782	787	874	850	828	862	793	873	844					7,493
23-24	198%	200%	173%	84%	167%	132%	111%	97%	50%	-17%	-22%	-22%	59%	130%
24-25	-9%	-10%	-4%	75%	5%	36%	48%	57%	16%					18%
HOOPLA (Print Books, Audio Books, Music, Movies)						Jan 2025 reduced to 2/mo vs 4/mo								
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
2023	408	326	400	379	451	436	453	421	403	433	359	440	4,909	3,677
2024	476	451	498	526	475	464	483	512	528	512	507	637	6,069	4,413
2025	437	390	407	372	378	364	377	387	342				13,816	3,454
23-24	17%	38%	25%	39%	5%	6%	7%	22%	31%	18%	41%	45%	24%	20%
24-25	-8%	-14%	-18%	-29%	-20%	-22%	-22%	-24%	-35%					-22%

WHITEFISH BAY PUBLIC LIBRARY

STATISTICS

KANOPY (PLAYS)														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
2023	286	278	228	232	197	202	185	191	192	211	191	287	2,680	1,991
2024	253	233	310	180	259	263	301	320	280	242	361	323	3,325	2,399
2025	289	337	368	348	394	321	394	416	399					3,266
23-24	-12%	-16%	36%	-22%	31%	30%	63%	68%	46%	15%	89%	13%	24%	20%
24-25	14%	45%	19%	93%	52%	22%	31%	30%	43%					36%
WIRELESS (Clients per Month)														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
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	40,179
2024	5,270	4,727	4,650	5,160	5,146	4,830	4,867	4,929	4,800	5,828	5,220	4,712	60,139	44,379
2025	5,983	4,508	5,177	5,520	5,456	5,040	4,960	4,960	5,400					47,004
23-24	10%	15%	9%	15%	10%	3%	15%	12%	6%	13%	7%	0%	10%	10%
24-25	14%	-5%	11%	7%	6%	4%	2%	1%	13%					6%
PC USER SESSIONS - # OF ADULT SESSIONS														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
2023	1,076	1,052	1,089	1,019	943	1,033	992	1,315	1,131	968	1,043	922	12,583	9,650
2024	724	956	933	1,053	1,017	1,001	1,146	1,012	1,101	1,137	1,018	1,000	12,098	8,943
2025	1,380	875	1,019	926	948	931	929	841	983					8,832
23-24	-33%	-9%	-14%	3%	8%	-3%	16%	-23%	-3%	17%	-2%	8%	-4%	-7%
24-25	91%	-8%	9%	-12%	-7%	-7%	-19%	-17%	-11%					-1%
PC USER SESSIONS - # OF KIDS SESSIONS														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
2023	0	0	0	0	0	0	85	1,201	802	879	636	648	4,251	2,088
2024	727	689	809	684	709	1,023	1,007	1,271	737	770	762	750	9,938	7,656
2025	552	544	721	679	773	1,045	1,394	1,347	828					7,883
23-24	n/a	n/a	n/a	n/a	n/a	n/a	1085%	6%	-8%	-12%	20%	16%	134%	
24-25	-24%	-21%	-11%	-1%	9%	2%	38%	6%	12%					3%
DOOR COUNT PER MONTH														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
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	114,942
2024	12,294	12,280	12,468	13,935	12,967	14,236	15,861	15,742	12,418	13,375	14,516	11,256	161,348	122,201
2025	14,223	12,082	13,717	15,124	14,051	15,123	16,601	14,939	13,211					129,071
23-24	3%	7%	3%	7%	12%	-1%	13%	8%	5%	9%	17%	3%	7%	6%
24-25	16%	-2%	10%	9%	8%	6%	5%	-5%	6%					6%
Patron Interactions at Adult & Youth Service Desks														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	YTD
2023	884	714	871	828	779	980	842	862	725	698	706	636	9,525	7,485
2024	835	755	802	835	794	975	912	904	702	701	684	588	9,487	7,514
2025	944	773	909	860	838	958	876	826	754					7,738
23-24	-6%	6%	-8%	1%	2%	-1%	8%	5%	-3%	0%	-3%	-8%	0%	0%
24-25	13%	2%	13%	3%	6%	-2%	-4%	-9%	7%					3%

To: Whitefish Bay Public Library Board of Trustees
From: Nyama Y. Reed, Library Director
Date: October 21, 2025 Meeting
Re: Workforce Snapshot: Survey, Compensation & Longevity



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.

Overview

The 2025 staff survey shows that the Whitefish Bay Public Library continues to be a positive, engaged, and high-performing workplace. Staff report strong satisfaction with their work, deep pride in serving the community, and a collaborative culture that supports both individual and team success.

At the same time, opportunities exist to strengthen staffing levels, compensation equity, communication, and professional development. These insights will help guide ongoing strategic planning in alignment with the Library's commitment to "offer an exceptional workplace."

Staff Satisfaction & Engagement

Nearly 90% of staff completed the September 2025 survey. Responses reflect a highly engaged team that values collaboration, meaningful work, and collegiality. Staff consistently describe WFBPL as *a friendly, welcoming, and supportive place to work*.

Key strengths include:

- **Positive Workplace Culture:** Staff enjoy their colleagues, leadership support, and shared mission.
- **Community Connection:** Many express pride in helping patrons and providing high-quality service.
- **Collaboration & Communication:** Most find intra-department communication effective and supervisor support strong.
- **Engagement:** Staff offered numerous actionable ideas for improving communication, workflow, and staff spaces.

Areas for improvement include more frequent all-staff meetings, better cross-department communication, inclusion of part-time staff in decision-making, and a virtual communication platform for announcements and updates.

Training & Professional Development

Staff generally feel well-trained and supported.

Many would like additional:

- In-person and hands-on training (particularly for part-time staff)
- Skill refreshers on infrequently used tasks
- Emergency preparedness and defibrillator training

Leadership is reviewing options for expanded in-person training options for all staff.

Performance Evaluation

Staff value feedback but identified improvements for the annual review process:

- Simplify and update the forms to better reflect job responsibilities for each position
- Improve timing so reviews occur regularly and are not rushed at year-end
- Continue supervisor check-ins and recognition throughout the year

The Leadership Team has reviewed the newly revised evaluation forms. The next step is for the Library Board to review and approve them.

Wages & Benefits

The last few years, Director Reed compared WFBPL wages to the 'MCFLS suburban average.' There are fourteen libraries in that group, including WFBPL, but not all libraries have the same positions as us. Currently only three libraries have a Head of Adult Services, which limits the ability to compare our wages. As a result, this year Director Reed also compared WFBPL wages to the averages of thirty comparable libraries based on the following metrics:

- libraries in MCFLS and neighboring library systems
- a full time library director
- at least 1.0 MLS FTE
- Census designation as "suburban"
- within 20% of WFBPL's statistics on select variables

See Addendum A for list of libraries.

The 2024 wage comparison shows six of eight WFBPL positions are 98-115% of the average. Two positions, Reference Assistants and Shelves, fall below average due to higher turnover in those positions.

Staff feedback on compensation echoed these findings:

- Wages have improved but should remain under regular review to stay competitive
- Staff recommend an annual wage review process
- The lack of benefits for part-time staff remains a key recruitment and retention barrier

Director Reed recommends evaluating the feasibility of adjusting current shelver and reference assistant wages to align WFBPL with peer libraries.

WFB Title	WFB Avg as % of MCFLS Suburban Avg	WFB Avg as % of Comps Avg (Qty 30)	Avg of Avgs	WFB Start Date (Avg)
Director (1) (MLIS)	99%	99%	99%	2014
Adult Services, Head of (1) (MLIS)	109%	116%	113%	2012-2020 Librarian; 2020-Present Dept Head
Circulation Services, Head of (1) (Other Than MLIS)	108%	101%	105%	2018
Youth Services, Head of (1) (MLIS)	112%	118%	115%	2013
Librarian (3) (MLIS)	95%	100%	98%	1999-2023 (2011)
Ref Asst (3) (Bachelors Level)	85%	85%	85%	2022-2024 (2023)
Circ Asst (9) (N/A)	96%	107%	102%	2012-2022 (2019)
Shelver (8) (N/A)	83%	83%	83%	2023-2025 (2025)

Longevity & Retention

Department heads and full-time librarians demonstrate strong longevity, averaging between 7 and 12 years of service. This reflects organizational stability and job satisfaction, likely supported by the wages and benefits associated with full-time employment.

Circulation Assistants also show longevity, with no new hires since 2022. Some Circulation Assistants have expressed interest in additional hours and the possibility of receiving benefits, which are currently limited under the Village of Whitefish Bay employee handbook.

Reference Assistants and Shelves remain short-term positions. Reference Assistants frequently move on to full-time employment elsewhere, often motivated by the need for higher wages and benefits. High school-age Shelves typically leave after graduation. The Library currently employs three adult shelves. One has been with the Library for 2.5 years, while the others are recent hires.

Equity, Access & Inclusion

Staff expressed pride in WFBPL's inclusive environment but identified barriers to address:

- Limited accessible parking and delayed snow removal

- Three additional accessible parking spaces were recommended for approval by the Village of Whitefish Bay Public Works Committee on Monday, October 13. Final approval will be considered by the Village Board on Monday, October 20.
- Need for updated door openers and additional accessibility technology
- Inequity created by reliance on part-time, non-benefited positions

These concerns are being considered for building planning and staffing strategy discussions.

Next Steps

Actions underway or planned include:

- Annual review of wages, benefits, and staffing hours
- Implementation of updated performance evaluation forms
- Exploration of expanded training opportunities
- Continued collaboration with the Village on facility accessibility (parking, doors)
- Consideration of additional study rooms and staff workspace improvements
- Ongoing review of fine-free practices, senior programming, and service enhancements

Conclusion

Staff satisfaction and engagement remain strong, driven by meaningful work, collaboration, and leadership support. Continued investment in training, communication, fair compensation, and workplace improvements will sustain WFBPL's reputation as an exceptional place to work, and by extension, a cornerstone for community connection and learning.

Addendum A

MCFLS Suburban Libraries

- | | | |
|------------------------------------|--|-------------------|
| 1. Brown Deer (only director info) | 6. Hales Corners | 11. St. Francis |
| 2. Cudahy | 7. North Shore (Bayside, Fox Point, Glendale, River Hills) | 12. Wauwatosa |
| 3. Franklin | 8. Oak Creek | 13. West Allis |
| 4. Greendale | 9. Shorewood | 14. Whitefish Bay |
| 5. Greenfield | 10. South Milwaukee | |

Comparable Libraries

Metrics: Neighboring library systems - Bridges (Waukesha & Jefferson Counties), Milwaukee, or Monarch (Dodge, Ozaukee, Sheboygan, and Washington Counties); have a full time library director; at least 1.0 MLS FTE; Census designation as “suburban;” within 20% of WFBPL’s statistics on select variables. Brown Deer is not included in the group because they only supply director salary in their annual report.

- | | | |
|--------------------------------|----------------------------|---------------------------------|
| 1. Brookfield | 11. Hales Corners | 22. Shorewood |
| 2. Cedarburg | 12. Hartland | 23. South Milwaukee |
| 3. Cudahy | 13. Menomonee Falls | 24. St. Francis |
| 4. Delafield | 14. Muskego | 25. U.S.S. Liberty (Grafton) |
| 5. Elm Grove | 15. New Berlin | 26. W.J. Niederkorn (Port Wash) |
| 6. Frank L. Weyenberg (Mequon) | 16. North Shore (Glendale) | 27. Wauwatosa |
| 7. Franklin | 17. Oak Creek | 28. West Allis |
| 8. Germantown | 18. Oconomowoc | 29. West Bend |
| 9. Greendale | 19. Pauline Haass (Sussex) | 30. Whitefish Bay |
| 10. Greenfield | 20. Pewaukee | |
| | 21. Sheboygan Falls | |

Addendum B



Whitefish Bay Public Library Staff Development Day Monday October 13



Agenda

- 8:30-8:40 Strategic Plan Goals, Components, Timing (Nikki)
- 8:40-9:10 Staff Survey Highlights (Nikki)
- 9:10-9:40 Suggestions (Nyama)
- 9:40-9:50 Break
- 9:50-10:30 Questions & Discussion (Nyama)
- 10:30-11:00 Break for Sound Bath Set-up
- 11:00-12:00 Sound Bath
- 12:00-1:00 Lunch



2025 Strategic Plan

Goal, Components, Timing

Goal: Update the strategic plan, using a five-year timeframe, with significant community input and understanding of needs, review of best practices and benchmarking, and a comprehensive understanding of the current operations of the Whitefish Bay Public Library.

Components:

- Review Mission and Guiding Principles: No change to mission, minimal changes to guiding principles expected
- Community Needs Assessment: Review Data, Benchmarking, Community Survey, Input from Foundation & Friends
- Staff Needs Assessment: Staff Survey, Review Data, Benchmarking
- Review all data and reports, analysis, benchmarking to identify priorities and opportunities
- SWOT analysis (strengths, weaknesses, opportunities, threats) and environment/landscape summary
- Identify Goals (4-6 high-level, long-term): ID action items, ways to measure, accountabilities, etc.

Timing:

- Started June 2025
- Staff Survey: September; Patron/Community Survey: Launched Sept 29. Closing Sunday, October 19.
- Ongoing meetings and updates with Leadership Team and Board, input from Friends and Foundation
- Strategic Plan Board Presentation & Approval: February Mtg (tentatively)
- Shared with Staff, Community, and Partners Once Approved



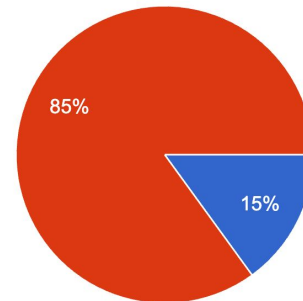
Staff Survey Highlights

Summary

- The 2025 staff survey reflects a **highly engaged and positive team culture.**
- Nearly **90% completed** the survey.
- Staff consistently report that they **enjoy their work, value their colleagues, and take pride in serving the community.**
- Engaged staff made **helpful and actionable suggestions** in staffing, communication, professional development, facilities, and equity that will inform the next phase of strategic planning.

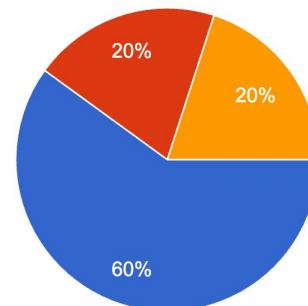
22 Responses: From 5 FT & 20 PT Staff

Are you:
20 responses



● Full time (40 hours per week) 3
● Part time (1-39 hours per week) 18

Select your department:
15 responses

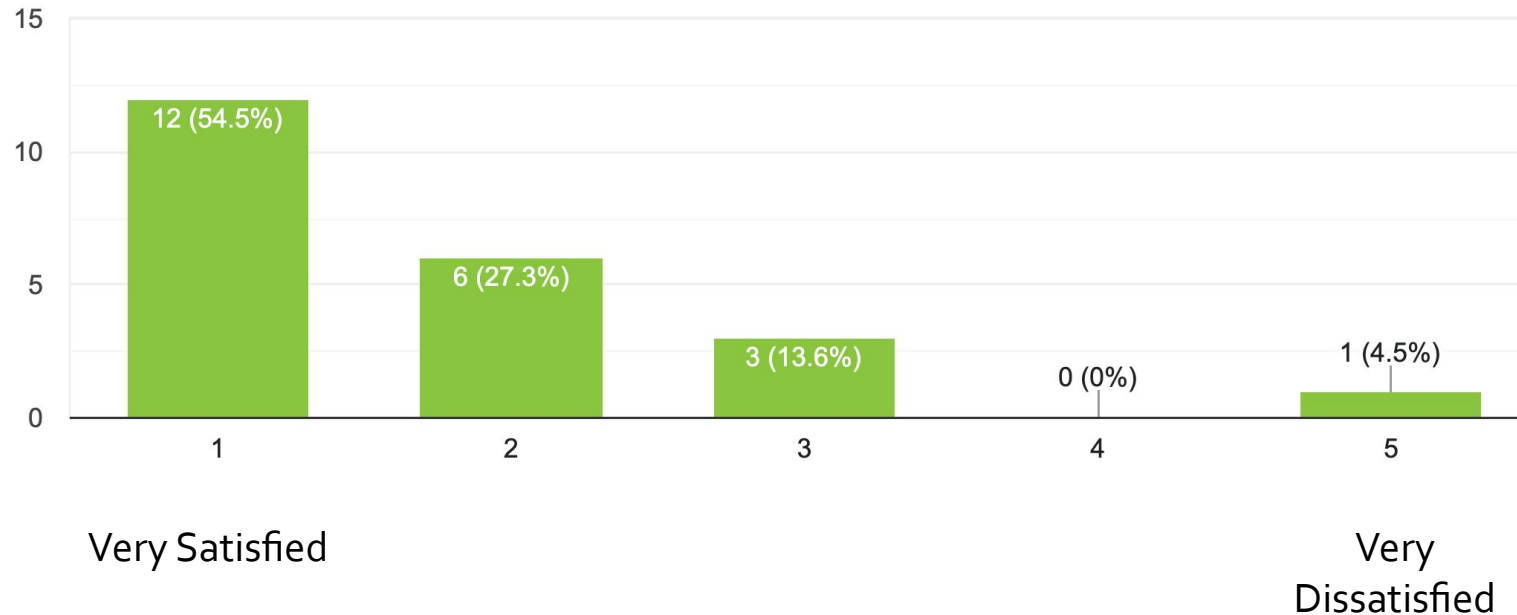


● Circulation Services 12
● Adult Services 3
● Youth Services 3

How satisfied are you with your current role at the library?

How satisfied are you with your current role at the library?

22 responses



What aspects of your job do you enjoy the most?

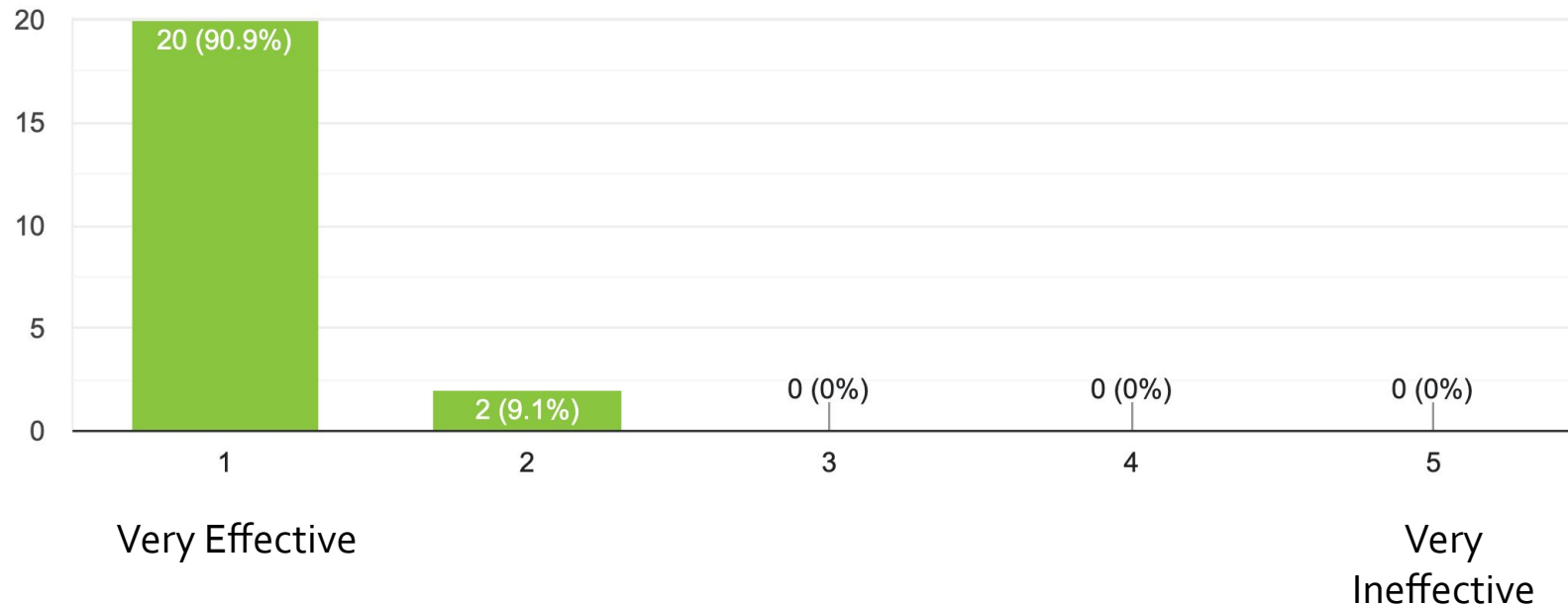
- **Positive Workplace Culture** – The library is described as a friendly, welcoming, and supportive place to work. Staff value their smart, caring, and devoted coworkers.
- **Community Connections** – Many enjoy interacting with patrons, building relationships with regular visitors, and helping people find books or solve problems.
- **Programs and Creativity** – Storytime, arts-and-crafts activities, and opportunities to be creative are highlights.
- **Variety and Engagement** – Staff appreciate the mix of tasks, such as cataloging, ordering, shelving, and paging, which keep the job interesting.
- **Library Atmosphere** – Several noted the calm, relaxing environment and the satisfaction of completing tasks.
- **Professional Purpose** – There is pride in performing an essential community function and contributing to a space that promotes literacy and learning.

“I thoroughly enjoy working with all of my coworkers, it is such a positive work environment. I also really enjoy serving and connecting with members of the community. I like that we have a lot of the same patrons visiting our library year after year...”

How effective is communication among team members in your department?

How effective is communication among team members in your department?

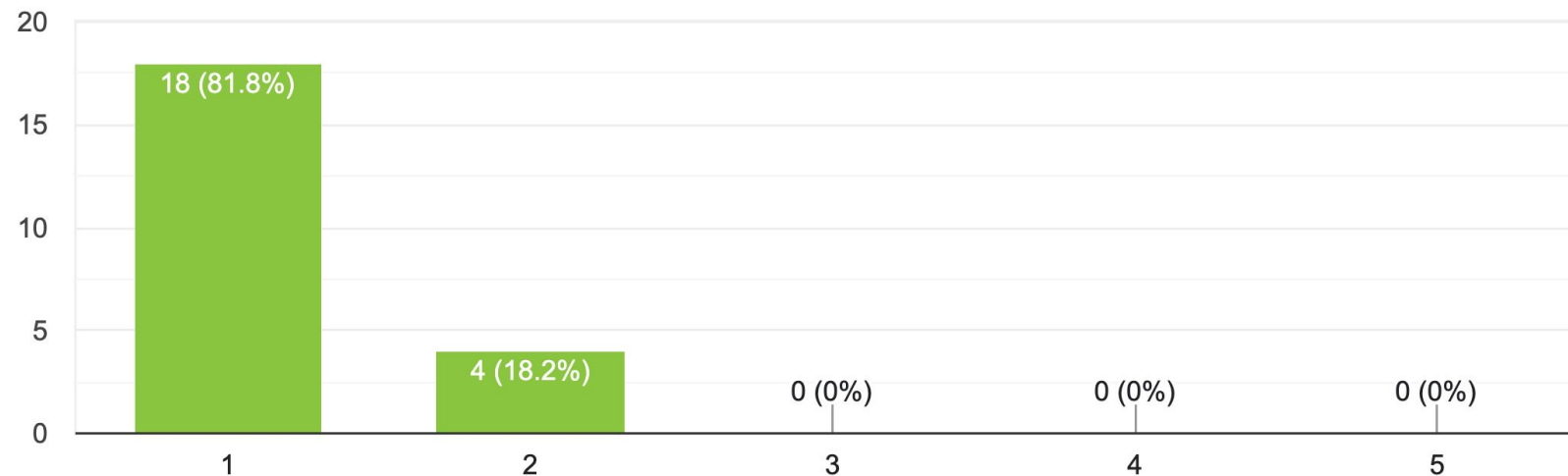
22 responses



How effective is the communication from your immediate supervisor?

How effective is the communication from your immediate supervisor?

22 responses



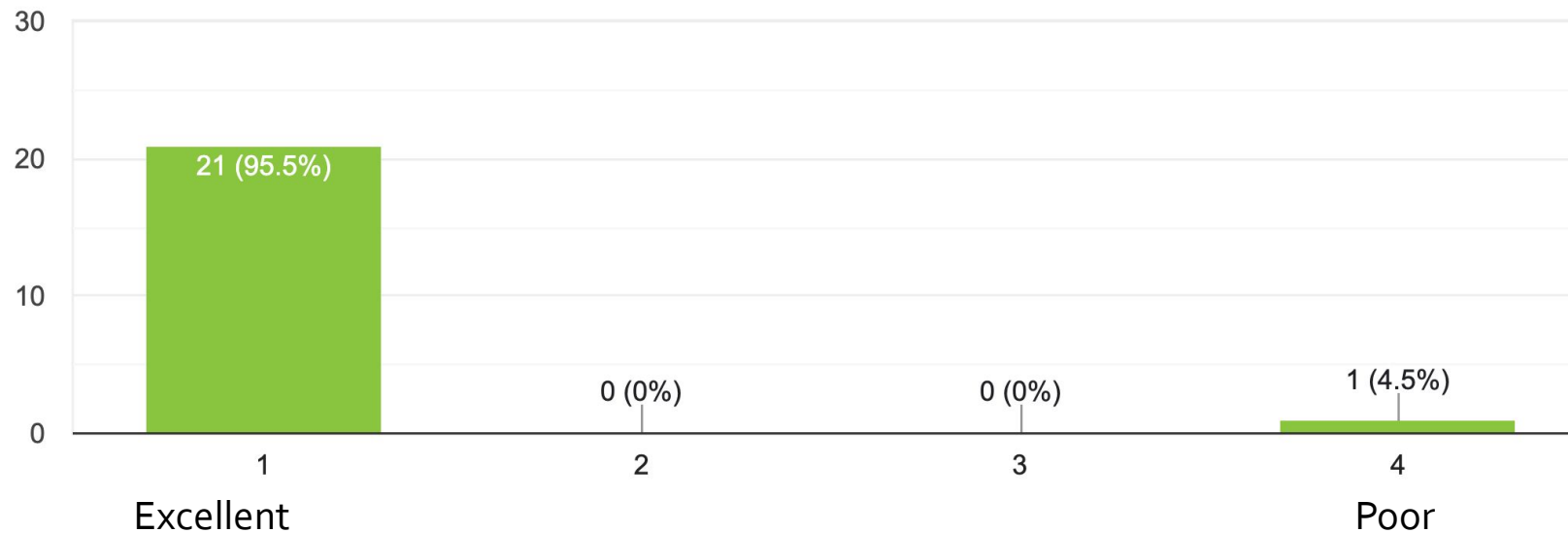
Very Effective

Very
Ineffective

How would you rate collaboration and support among staff in your department?

How would you rate collaboration and support among staff in your department?

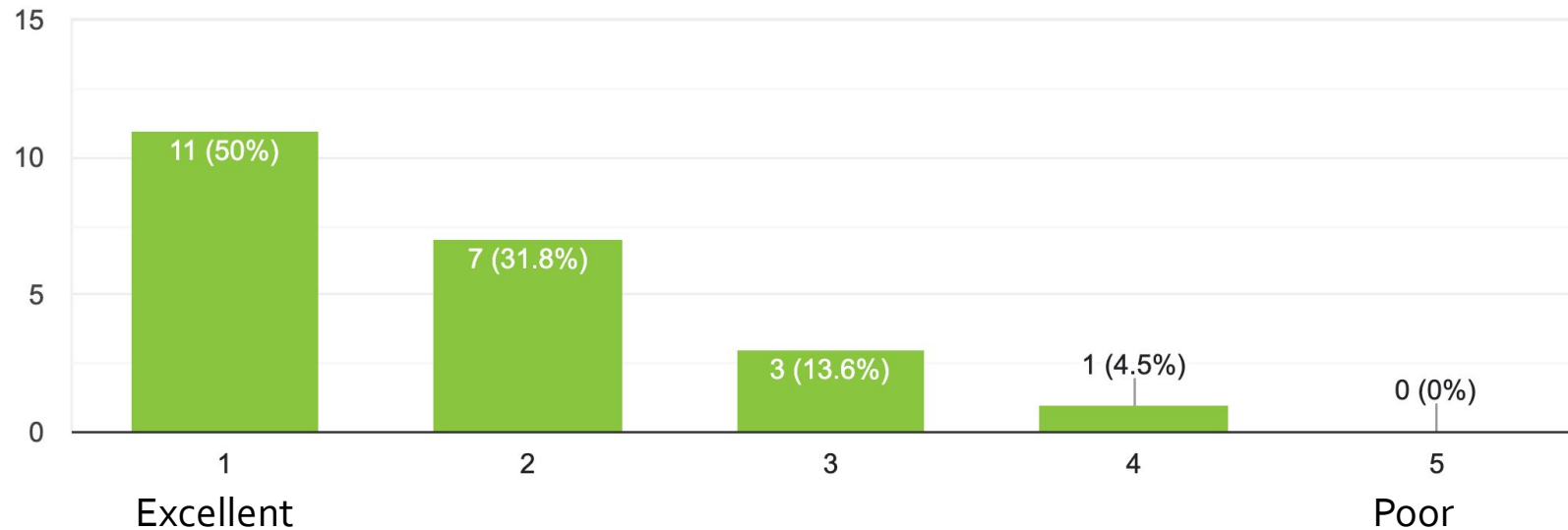
22 responses



How would you rate collaboration and support across departments?

How would you rate collaboration and support across departments?

22 responses



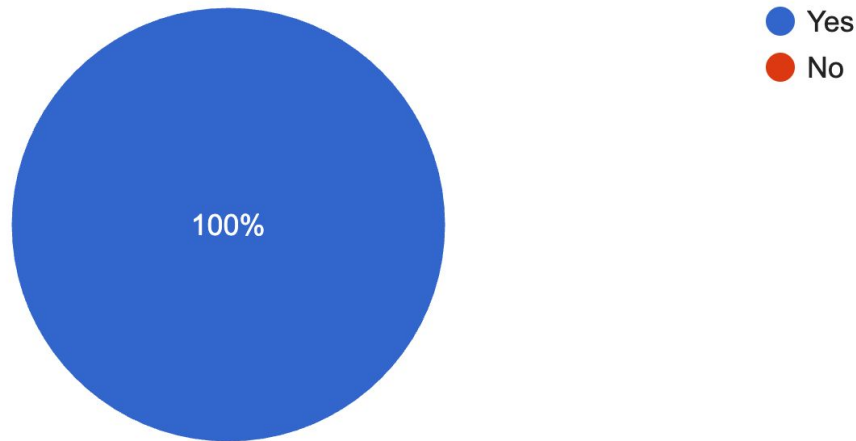
What improvements would you suggest for communication or teamwork?

- **Centralized Workspaces** – Several staff support relocating offices to a shared work area to encourage cross-department collaboration and “cross-pollination” of ideas.
- **More Frequent Meetings** – Quarterly cross-department meetings and more regular all-staff gatherings would improve information sharing and team connection.
- **Team Building** – Suggestions included informal staff get-togethers to build camaraderie.
- **Improved Communication Flow** – Staff expressed a need for more consistent communication between reference and circulation teams, as well as clearer updates from the leadership team to all staff.
- **Opportunities for Input** – Part-time staff would like to be consulted on decisions that directly affect their daily work, such as new collections or service changes.
- **Shared Information Tools** – A virtual announcement page or internal communication platform could help keep everyone updated.

Do you believe you have access to adequate training and professional development opportunities?

Do you believe you have access to adequate training and professional development opportunities?

22 responses



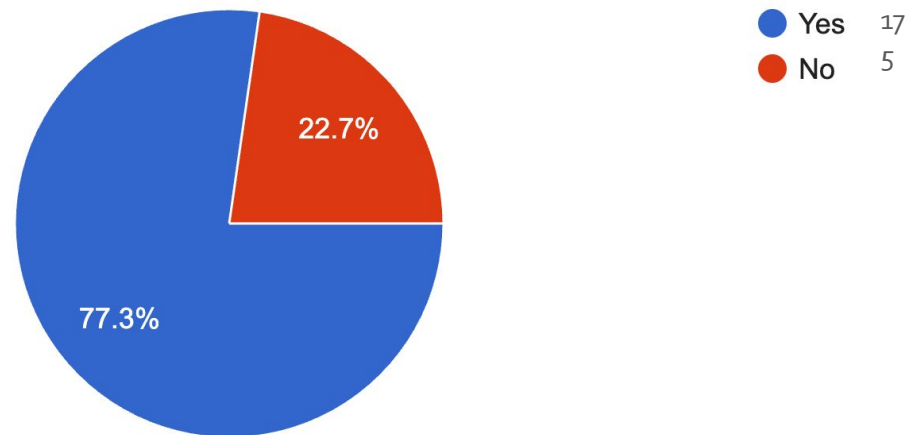
What additional training, resources, or support would help you perform your job better?

- **Professional Development Opportunities** – Interest in being informed about learning opportunities beyond the library, such as visits to other libraries or community outreach events.
- **Hands-On Training** – Requests for in-person training sessions, especially for part-time staff, focused on library-specific issues rather than only online cybersecurity modules.
- **Emergency Preparedness** – Staff would like training on how to use the library's defibrillator.
- **Skill Refreshers** – Occasional refreshers on infrequently used tasks (e.g., copier functions) would be helpful.
- **Overall Satisfaction** – Some staff feel well-trained and well-supported and did not identify additional needs.

Do you feel the library is adequately staffed to meet its needs currently?

Do you feel the library is adequately staffed to meet its needs currently?

22 responses



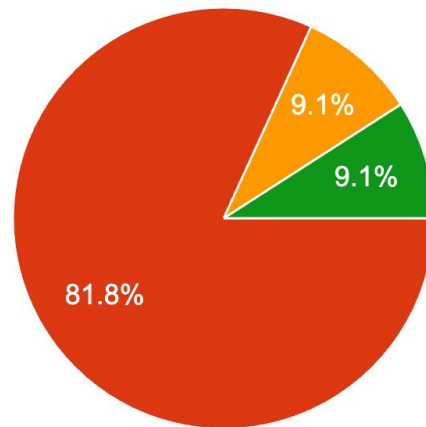
If "No" above, please provide details or suggestions to improve.

- **Adult Services Staffing** – Strong agreement that Adult Services is understaffed. Suggestions include converting an existing part-time position into a full-time role, hiring an additional full-time librarian, or adding one to two part-time reference staff.
- **Coverage Challenges** – Staff shortages create stress when filling evening, weekend, and sick-day shifts, impacting multiple departments and requiring circulation staff to cover reference more often.
- **Impact on Services** – Current staffing limits the library's ability to expand adult programming, strengthen community collaborations, and maintain smooth operations during absences or turnover.
- **Sufficient but Strained** – When fully staffed, operations run smoothly, but even a single resignation or absence causes significant disruption.

Which of the following best describes your workload?

Which of the following best describes your workload?

22 responses

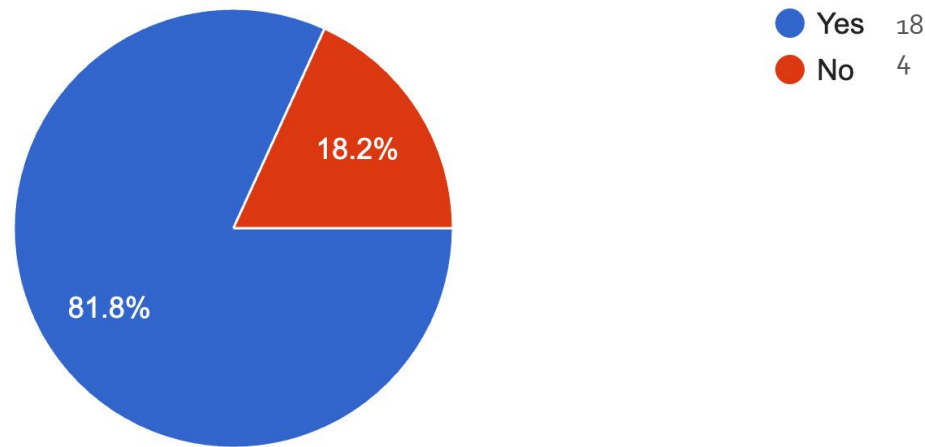


- I often do not have enough tasks to fill my work time 0
- I have a reasonable number of tasks to complete during my work time 18
- I often have more tasks than I can accomplish in my work time 2
- Most of the time I have more tasks than I can accomplish in my work time 2

Do you believe that your compensation is fair given your work and the marketplace?

Do you believe that your compensation is fair given your work and the marketplace?

22 responses



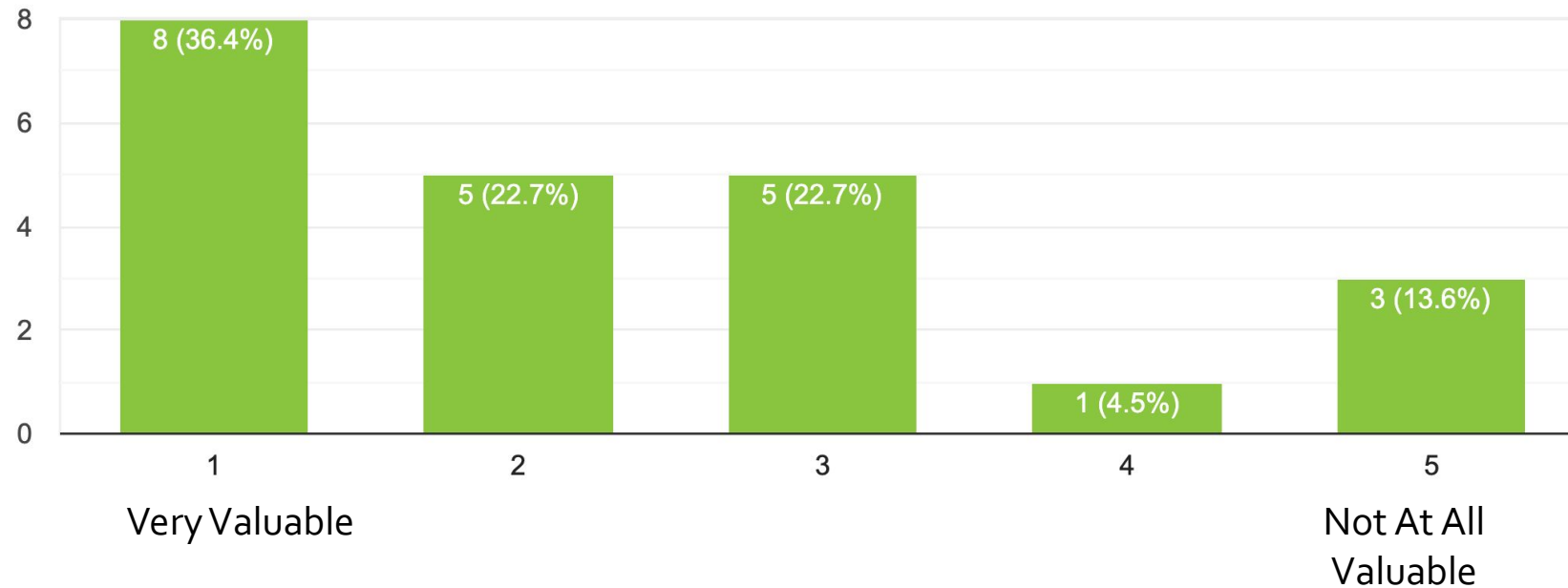
If "No" above, please provide details or suggestions to improve.

- Some staff feel compensation is improving, but several still view wages as low relative to the work performed and market standards.
- **Market Comparisons** – Staff referenced industry comparisons and suggested wages should align with or exceed peers in Milwaukee County and Southeastern Wisconsin.
- **Living Wage Concerns** – Comments noted that \$20 per hour should be a baseline and that current pay is too low, with one remark that \$10 per hour would be an improvement.
 - “NPR just had a story indicating that \$20 should be the minimum wage - I agree.”
 - “We could at least make \$10 per hour. Our pay is very low.”
- **Regular Review** – Recommendation for annual or biannual wage reviews to prevent falling behind comparable libraries.

Is your annual performance review a valuable experience?

Is your annual performance review a valuable experience?

22 responses



What improvements would you suggest for the annual performance review process?

- **Form and Content** – Suggestions include simplifying the forms and ensuring they accurately reflect the work performed.
- **Timing Concerns** – End-of-year timing feels rushed and contributes to reviews being skipped or delayed.
- **Need for Regularity** – Staff want the process to occur consistently each year for all employees.
- **Positive Notes** – Those who have received supervisor feedback (formal or informal) found it helpful and detailed.

Any barriers to equity, access, or inclusion for patrons you have observed or experienced?

- **Parking and Snow Removal** – Most common concern is insufficient disabled parking and slow snow removal, especially at ramps and curbs, which limits accessibility after storms.
- **Physical Space Accessibility** – Some staff worry that cluttered areas or that the building layout may hinder patrons with mobility challenges.
- **Assistive Technology** – Recent improvement with adding a wheelchair-accessible catalog station was noted, but there is still no Braille software for blind patrons.
- **Policy Improvements** – Positive feedback on allowing guest passes for all patrons, which has improved computer access equity.
- **Other Barriers** – A few mentioned late fees as a potential equity issue and raised concerns about whether all patrons receive equal treatment.
- **Overall Perception** – Several staff indicated no major barriers, suggesting general satisfaction with current inclusivity efforts.

Any barriers to equity, access, or inclusion for staff you have observed or experienced?

- **No Barriers Observed** – Several staff reported no observed barriers, suggesting that day-to-day equity and inclusion issues are not widespread.
- **Part-Time Employment Structure** – The 80% of staff being part-time with no benefits is seen as a barrier to attracting and retaining talent, limits diversity in hiring, and contributes to higher turnover when staff leave for full-time, benefited roles elsewhere.
- **Pay and Hours** – Low wages and limited hours make positions less appealing, especially for those commuting from outside the Village, further narrowing the applicant pool.
- **Comparison to Other Departments** – Reliance on part-time roles is noted as unusual compared to other Village departments, highlighting a structural inequity.
- **Clarity on DEI Support** – Past experiences with addressing mental health, physical health, or disability issues left staff unsure who was responsible for providing support or resources.

What changes would you recommend to improve the library as a workplace?

- **Positive Feedback** – Some staff reported no recommended changes, noting that the library already functions well as a workplace.
- **Part-Time Staff Support** – Suggestions for more paid holidays and more opportunities for part-time staff to interact with the Library Board.
- **Work Space Improvements** – Multiple comments about reorganizing and redeveloping staff work areas (backroom, offices) to eliminate clutter, improve safety, and create better space for collaboration.
- **Facility Fixes** – Requests to repair the front desk water issue and replace stained ceiling tiles, as well as improve lighting in the book aisles.
- **Hours Adjustments** – Recommendation to change Saturday hours to 12–4 p.m., at least during the school year when Sunday hours are also offered.
- **Onboarding and Communication** – Suggestion to formally introduce new staff, particularly shelveers, to the team.

What changes would you recommend to improve the library for patrons?

- **Positive Feedback** – Several staff noted that patrons already appreciate the service-focused environment and did not suggest major changes.
- **Space Enhancements** – Multiple requests for more study rooms, additional tables and chairs, and improved comfortable seating in both Youth and Adult areas.
- **Accessibility Upgrades** – Suggestions for more handicap parking, adding automatic door openers for bathrooms, and replacing outdated door openers on main entrances.
- **Programming** – Interest in more programs for seniors.
- **Policy Adjustments** – Proposal to eliminate fines for children's and YA materials.
- **Technology and Services** – Request to offer faxing services for patrons.
- **Environment Improvements** – Concerns about excessive computer game use in the children's area and general clutter reduction.

Is there anything else you would like to share?

- **Workplace Culture** – Overwhelmingly positive remarks about the library as a welcoming, supportive, and meaningful place to work. Staff expressed pride in their coworkers' compassion, education, and dedication to serving the community.
- **General Satisfaction** – Many simply stated that they enjoy working at the library and had no additional concerns to share.
- **Team Appreciation** – Several noted that the library has a great team doing good work with the resources available.
- **Compensation and Benefits** – One comment called for expanded benefits (health care, vacation, sick time) for part-time staff to better support those who need them.
- **Holiday Hours** – A suggestion to close the last two Sundays in December, similar to Milwaukee Public Library.

Key Strengths

- **Positive Workplace Culture** – Staff describe the library as friendly, supportive, and collaborative. There is pride in the library's service to the community and satisfaction with the work environment.
- **Community Engagement** – Staff enjoy interacting with patrons, offering readers' advisory, and running programs (especially storytimes and creative activities).
- **Communication & Collaboration** – Many find intra-department communication effective and report strong working relationships with colleagues and supervisors.
- **Training & Development** – Most staff feel well-trained, supported, and able to access professional development when needed.
- **General Satisfaction** – The majority rate their workload as reasonable, feel their wages are improving, and believe the library is doing a good job with available resources.

Opportunities for Improvement

- **Staffing & Coverage** - Adult Services is understaffed; staff suggest adding a full-time librarian or additional part-time reference staff. Coverage gaps during absences create stress, especially on evenings and weekends.
- **Compensation & Benefits** - Part-time wages are low and lack benefits, limiting applicants and potentially increasing turnover. Staff recommend annual wage reviews to stay competitive.
- **Communication & Inclusion** - Staff want more cross-department collaboration, quarterly all-staff meetings, and part-time input on decisions. A shared communication platform is requested.
- **Training & Professional Development** - Requests for more in-person training, defibrillator training, and refreshers on seldom-used tasks.
- **Facilities & Work Environment** - Staff spaces need decluttering and upgrades (lighting, ceiling repair). Patrons need more study rooms, seating, and improved accessibility.
- **Performance Review Process** - Reviews are inconsistent; staff call for annual reviews with simplified forms.



Suggestions

Doing or In Progress

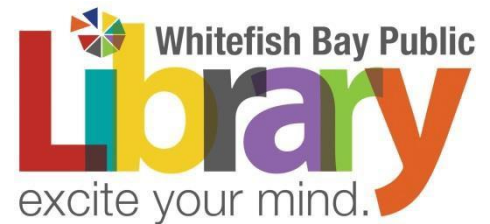
- Staff
 - Centralized workspaces
 - Annual review of wages, benefits, and staffing hours
 - Updating employee performance review forms and process
- Space
 - Working with DPW for additional handicap parking space(s) and snow removal
 - Working on adding another study room and automatic door openers to front lobby public restrooms
- Patron Services
 - Library Board reviews fine-free trend every couple of years
 - More programs for seniors/retirees
 - Obtained quote for fax service
 - Youth staff working to manage volume levels and behavior during computer use. No plans to reduce or eliminate gaming.

To Do or Explore

- Staff
 - More frequent all staff meetings
 - Informal staff get-togethers (establish a “fun” committee?)
 - Improve communication flow; find balance between not enough emails and too many
 - Loop in part-time staff during decision making
 - Virtual announcement page or communication platform
 - Examples? How different than email?
 - Staff training: more in-person opportunities; skills refreshers (ex. copier, AED)
 - Introduce new staff more broadly
- Space
 - Centralized workspaces
 - Declutter public and staff spaces
 - Improve lighting in book aisles
- Patron Services
 - Explore braille software and other accessibility options
 - Explore changes to hours and closing last two Sundays in December

Questions & Discussion

To: Whitefish Bay Public Library Board of Trustees
From: Nyama Y. Reed, Library Director
Date: October 21, 2025 Meeting
Re: Review Draft Staff Evaluation Forms



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.

Overview

The Library's current employee evaluation forms were approved more than a decade ago during a time of significant staff performance and behavior challenges. At that time, the forms were intentionally designed to document poor performance as a step toward termination. As a result, the process is now outdated, overly complex, and discouraging for both supervisors and staff.

Purpose of Revision

This update reflects the Library's ongoing commitment to fostering an exceptional workplace culture grounded in fairness, accountability, and professional growth. By modernizing the evaluation process, the Library continues to align staff development with organizational goals and service excellence.

The Leadership Team has reviewed and updated the forms to reflect a more constructive, efficient, and meaningful evaluation process. The new forms emphasize performance development and accountability rather than punitive documentation.

Key Improvements

- **Streamlined Format:** The updated forms are concise and easier to complete, reducing redundancy and administrative burden.
- **Task-Based Evaluation:** Following training and guidance from CVMIC, the new forms focus on specific job duties and work tasks. This structure allows supervisors to provide clearer, more actionable feedback.
- **Simplified Rating Scale:** The previous five-point scale lacked clarity and usefulness. Raises are not determined at that level of detail, making the distinctions unnecessary.
 - The new three-point scale better aligns with the Library's pay structure and performance expectations:
 - **Meets Expectations** – Eligible for the standard annual raise.
 - Typically, 90-95% of staff are in this category.
 - **Exceeds Expectations** – Eligible for a merit increase (though none have been available in recent years).
 - 5-10% of staff are in this category.
 - **Needs Improvement** – Requires a performance improvement plan and is not eligible for a raise until improvement is demonstrated.
 - 0% of staff have been in this category the last 10 years.

Motion

Motion to approve the revised staff evaluation forms.

Examples of current evaluation forms

Whitefish Bay Public Library

Employee Performance Review for Full Time Staff

The purpose of the performance review is to provide a communication tool to be used in the evaluation of employee performance and goal setting. This process is useful in order to form goals for the upcoming year, clearly communicate performance expectations, assist staff in accomplishing the job to be done, and evaluate the results. As the library evolves with the environment and the community it serves the review process is then intended to offer both employer and employee an opportunity to reflect and respond to any changes in performance expectation.

Name:

Hire Date/Years Employed: /

Service Area/Position: /

Review Year:

Date of review meeting:

Acknowledgement of Performance Review

The employee and director acknowledge that the performance review was held. The employee signature indicates neither agreement nor disagreement with the review, but that it was read by the employee and discussed with the director.

Employee Signature: _____

Date: _____

Director Signature: _____

Date: _____

Whitefish Bay Public Library

Performance Review Process

Step 1) The performance review process begins with the employee completing their **Employee Performance Planning Worksheet** and the director completing the **Director Performance Planning Worksheet**. These worksheets will contain information about:

- Job-related responsibilities
- Goals that support the Whitefish Bay Library's Mission
- Professional Development – including any workshops, training, or conference attendance, etc.

Step 2) An initial meeting will be held where the employee and the director will share and discuss their written responses to the questions on the worksheet. During this meeting clarification will be made on job duties, assignments and priorities. Goals will be clarified and professional development plans for the review period will be identified. This meeting will occur in the first month of the review period.

Step 3) A mid-year meeting will be held during the review period where the employee and director will review the areas on the Performance worksheet. This allows for any changes or concerns in the fulfillment of the job responsibilities, goals or development from the performance worksheet to be discussed, and if necessary, documented.

Step 4) At the end of the review period:

- The director will provide the employee with feedback on their job responsibilities, goals and development. Suggestions for improvements and comments will be included as needed. The director will also evaluate the employee's communication and listening, intrapersonal and resource management skills.
- Each employee will provide a written self appraisal. This will be used for discussion purposes only.

I. Employee/Director Performance Planning Worksheet

Employee Performance Planning Worksheet

Name:

Service Area/Position:

Use a separate sheet of paper for responses.

- 1) List what you consider to be your primary job duties or assignments at this time. List some specific daily/weekly/monthly tasks that you are responsible for.**
- 2) Develop 1-3 goals for each of the Action Plan areas that will support the Library's Mission Statement during the review period. Be sure to include a timeline for when you want the goal achieved by and the benefits that will impact the library.**
- 3) Describe the training or development activities that you hope to pursue for the upcoming review period that will help to improve or enhance your job performance and/or career development.**

Director Performance Planning Worksheet

Name:

Service Area/Position: /

The Library Director will complete the following points.

- 1) List the primary job duties or assignments for this employee's position at this time.**
- 2) Recommend goals, improvements or changes for the upcoming review period for this position that will directly support the current Whitefish Bay Library Mission Statement.**
- 3) Describe the training or development activities that would support this employee during the upcoming review period that will help to improve job performance and/or career development.**

Final Performance Evaluation Worksheet
Compilation of Employee/Director Worksheets

Name:

Service Area/Position: /

Review Period:

SUMMARY OF STRENGTHS AND AREAS OF IMPROVEMENT

1. Strengths (Comment on the strongest performance assets)

2. Areas of Improvement (Comment on areas to work on in the upcoming year)

Goals for Growth (List specific goals agreed upon for accomplishment before the next evaluation)

1) Primary job duties/assignments for this position for this review period include:

2) Goals, improvements, or changes to this position during the review period that will directly support the current Whitefish Bay Library Mission Statement are:

3) Continuing education or development activities that this employee will be provided support for during the review period to enhance job performance and career development include:

II. Director Review of Performance Worksheet

At the end of the review period, the director will provide the employee with feedback on their job responsibilities, goals and development defined in the initial meeting. Suggestions for improvements and comments will also be included as needed.

A. Job-related responsibilities

Whitefish Bay Library Expectation: Employee performs consistent with job duties outlined on Performance Worksheet.

☐ **Employee performs at a high level**

☐ **Employee performs at a satisfactory level but can improve as noted.**

☐ **Employee performs at an unsatisfactory level. Initiate 90 day improvement period.**

Director Comments:

B. Goals that support the Whitefish Bay Library's Mission

Whitefish Bay Library Expectation: Employee accomplishes goals outlined on Performance Worksheets supporting the Whitefish Bay Library's Mission.

☐ **Employee performs at a high level**

☐ **Employee performs at a satisfactory level but can improve as noted.**

☐ **Employee performs at an unsatisfactory level. Initiate 90 day improvement period.**

Director Comments:

C. Professional Development – including workshops, training, conference attendance, etc

Whitefish Bay Library Expectation: Employee participates in relevant workshops, training, or conferences to improve learning/career development.

☐ **Employee performs at a high level**

☐ **Employee performs at a satisfactory level but can improve as noted.**

☐ **Employee performs at an unsatisfactory level. Initiate 90 day improvement period.**

Director Comments:

III. Additional Director Performance Review Areas

D. Communication and Listening Skills

Whitefish Bay Library Expectation: Employee demonstrates effective oral, written and listening communication skills with both the public and other library staff members.

☐ **Employee performs at a high level**

☐ **Employee performs at a satisfactory level but can improve as noted.**

☐ **Employee performs at an unsatisfactory level. Initiate 90 day improvement period.**

Director Comments:

E. Interpersonal Skills

Whitefish Bay Library Expectation: Employee demonstrates positive and courteous working relationships with the public and other library staff members.

☐ **Employee performs at a high level**

☐ **Employee performs at a satisfactory level but can improve as noted.**

☐ **Employee performs at an unsatisfactory level. Initiate 90 day improvement period.**

Director Comments:

F. Resource Management Skills

Whitefish Bay Library Expectation: Employee practices effective budget control and utilizes staff and Library resources within established guidelines.

☐ **Employee performs at a high level**

☐ **Employee performs at a satisfactory level but can improve as noted.**

☐ **Employee performs at an unsatisfactory level. Initiate 90 day improvement period.**

Director Comments:

IV. Employee Self Appraisal

At the end of the review period, each employee will provide a written self appraisal to include their accomplishments as well as challenges encountered during the year. This will be used for discussion purposes only.

GENERAL KNOWLEDGE OF THE LIBRARY

Library Expectation: Employee should be able to have an understanding of these concepts as explained by their supervisor.

- ___ Mission of the Whitefish Bay Library
- ___ Basic history of the Whitefish Bay Library
- ___ The library's position as a Village department
- ___ The role of the Library Board
- ___ The Library Director's role
- ___ Librarian-in-Charge role
- ___ Milwaukee County Federated Library System (MCFLS)
- ___ Library Rules of Conduct
- ___ Confidentiality of library patron records
- ___ Building security
- ___ Positive Patron Service
- ___ Village Handbook
- ___ Employee attire
- ___ Safety in the workplace; first-aid equipment; incident reports
- ___ Village Policy on Internet and E-mail Usage

Supervisor Comments:

Whitefish Bay Public Library
Performance Appraisal for Circulation Staff



Name: _____

Meeting Date: _____

Date of Hire: _____

Job Title: _____

Annual or 6-Month Review: _____

Rating scale: 5 4 3 2 1 N/A
Exceeds requirements ----- Meets requirements ----- Needs improvement

POSITION KNOWLEDGE

Understands and demonstrates basic knowledge of circulation procedures and has the technical skills needed to use the circulation module of the automation system.

5 4 3 2 1 N/A

Takes initiative to learn and master changes or updates in circulation procedures. Is willing and able to adapt to technical changes in the system.

5 4 3 2 1 N/A

Understands and supports the mission statement and values of the Library as set by the Library Board.

5 4 3 2 1 N/A

Follows Library policies and procedures and knows how to locate them. Demonstrates understanding of the MCFLS shared system and CountyCat.

5 4 3 2 1 N/A

Ability to operate Library equipment as required; takes initiative to learn operation of equipment.

5 4 3 2 1 N/A

Supervisor Comments:

COMMUNICATION SKILLS

Communicates effectively and courteously with staff and patrons in person and over the phone. Updates the next shift with any pertinent information.

5 4 3 2 1 N/A

Takes the time to understand patrons' requests and directs, transfers, or refers them to the appropriate source.

5 4 3 2 1 N/A

Expresses ideas and opinions in appropriate venue and manner. Remains neutral to the public.

5 4 3 2 1 N/A

Maintains a professional demeanor and appearance.

5 4 3 2 1 N/A

Supervisor Comments:

CUSTOMER SERVICE

Welcoming and courteous to patrons: makes eye contact, smiles, gives attention to patron, if patron is waiting acknowledges them in a verbal or nonverbal manner.

5 4 3 2 1 N/A

Provides consistent and appropriate service to patrons; treats each individual with the same level of service. Seeks assistance when needed. Stops side conversations to attend to patron.

5 4 3 2 1 N/A

Is able to maintain composure and multi-task phone calls and patrons in person. Knows to serve patrons in person before phone calls.

5 4 3 2 1 N/A

Maintains confidentiality of patron records and patron privacy.

5 4 3 2 1 N/A

Supervisor Comments:

INTERPERSONAL RELATIONS

Works effectively and courteously with other staff members and maintains a positive attitude.

5 4 3 2 1 N/A

Fosters a cooperative work environment through collegial communication and professional attitude.

5 4 3 2 1 N/A

Offers assistance to other staff members; helps out when seeing a need to do so.

5 4 3 2 1 N/A

Demonstrates a willingness to achieve common goals; supports organizational decisions.

5 4 3 2 1 N/A

Accepts constructive suggestions and is willing to act on them.

5 4 3 2 1 N/A

Supervisor Comments:

ATTENDANCE

Adheres to a regular work schedule, is punctual for shifts and return from breaks. Is mindful of time spent away from work area.

5 4 3 2 1 N/A

Notifies supervisor about any absences. Finds own replacements as needed.

5 4 3 2 1 N/A

Fills in for open shifts when they are posted.

5

4

3

2

1

N/A

Supervisor Comments:

Summary of Strengths and Areas of Improvement

1. Strengths (Comment on the strongest performance assets)

2. Areas of Improvement (Comment on areas to improve upon in the upcoming year)

Reviewing Supervisor's Signature: _____

Date: _____

Employee's Signature: _____

Date: _____

I (Director) acknowledge that I have reviewed this performance appraisal.

Director's Signature: _____

Date: _____

Whitefish Bay Public Library
Performance Appraisal for Librarians



Name: _____

Meeting Date: _____

Date of Hire: _____

Job Title: _____

Annual or 6-Month Review: _____

Rating scale: **5** **4** **3** **2** **1** **N/A**
Exceeds requirements ----- Meets requirements ----- Needs improvement

*A rating of 1 should result in a performance improvement plan.

POSITION KNOWLEDGE

Understands and demonstrates basic principles, techniques, practices and procedures of position.

5 4 3 2 1 N/A

Takes initiative to learn and master changes in information retrieval systems that include: CountyCat, BadgerLink, the library's subscription databases and other relevant electronic resources.

5 4 3 2 1 N/A

Understands and supports the mission statement and values of the Library as set by the Library Board.

5 4 3 2 1 N/A

Follows Library policies and procedures and knows how to locate them. Understands responsibilities and duties when acting as Librarian in Charge.

5 4 3 2 1 N/A

Ability to operate Library equipment as required; takes initiative to learn operation of equipment.

5 4 3 2 1 N/A

Ability to follow oral and written instructions and follows through correctly or asks for clarification.

5 4 3 2 1 N/A

Supervisor Comments:

QUALITY OF WORK

Is diligent about completing tasks with appropriate guidance and direction.

5 4 3 2 1 N/A

Accuracy in work; takes initiative to fully understand patrons' reference requests and fulfill their need using various formats that are reputable and reliable for information. For example, does not just Google an answer but evaluates the source for accuracy or uses reputable web sites or databases.

5 4 3 2 1 N/A

Work consistently meets standards set by supervisor; does not spend excessive time on the computer for non-work related personal use, always tries to find something constructive to do.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Completes assignments correctly and in a timely fashion; takes care of the public area and straightens as needed to make sure it appears presentable.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Contributes ideas for improvements in existing techniques and procedures.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Supervisor Comments:

COMMUNICATION

Communicates effectively and courteously with staff and patrons in person and over the phone. Updates the next person on the reference desk of any pertinent information.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Understands and conducts reference interviews and initiates follow up as needed to be sure patrons are finding what they want or offers an acceptable alternative.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Fosters a cooperative, positive work attitude and supports organizational decisions.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Expresses ideas and opinions in appropriate venue and manner.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Supervisor Comments:

CUSTOMER SERVICE

Welcoming and courteous to patrons: makes eye contact, smiles, gives attention to patron, if patron is waiting acknowledges that they know they are there.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Provides consistent and appropriate service to patrons; seeks reference assistance from other librarians as needed or asks another librarian to serve a patron during busy times.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Is able to maintain composure and multi-task phone calls and patrons in person. Knows to take names and phone numbers of callers if time does not allow for immediate service.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Patient and empathetic with patrons; protects patrons' privacy.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Roves the Youth Services wing to help patrons when there is no one there on desk duty.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Supervisor Comments:

JUDGEMENT

Demonstrates ability to weigh alternatives and arrive at logical conclusions.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Uses correct judgement in applying policies to patron situations.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Assumes responsibility when necessary; knows duties of being Librarian in Charge.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Supervisor Comments:

INTERPERSONAL RELATIONS

Works effectively and courteously with other staff members and maintains a positive attitude.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Fosters a cooperative work environment through collegial communication and professional attitude.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Offers assistance to other staff members; helps out when seeing a need to do so.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Demonstrates a willingness to achieve common goals.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Accepts constructive suggestions and is willing to act on them.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Supervisor Comments:

ATTENDANCE

Conforms to a regular work schedule; is willing to fill in at times of need.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Reports to work on time; is prepared when library is open for business.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Notifies supervisor promptly about any absences.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Supervisor Comments:

ADAPTABILITY

Willingness to learn and perform new duties as they arise and are applicable to the position.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Willingness to assist with new projects when applicable.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Is flexible in adapting to daily work situations and interacting with a diverse community.

5	4	3	2	1	N/A
---	---	---	---	---	-----

Supervisor Comments:

Summary of Strengths and Areas of Improvement

1. Strengths (Comment on the strongest performance assets)

2. Areas of Improvement (Comment on areas to work on in the upcoming year)

3. Goals for professional growth (List specific goals agreed upon for accomplishment before the next evaluation)

Reviewing Supervisor's Signature: _____ Date: _____

Employee's Signature: _____ Date: _____

I (Director) acknowledge that I have reviewed this performance appraisal.

Director's Signature: _____ Date: _____

Draft evaluation forms

**Whitefish Bay Public Library
Performance Appraisal for
Part-time
Circulation Assistants**



POSITION SPECIFIC TASKS

CIRCULATION

Accurately checks materials in and out, processes holds, and processes MCFLS delivery items.

E____ M____ NI____

Accurately registers new patrons and updates patron records.

E____ M____ NI____

Collects and informs patrons about fines and fees.

E____ M____ NI____

Manages holds on hold shelf and in Delivery system.

E____ M____ NI____

Meets physical demands of the position including standing for long periods, lifting, stooping, and reaching.

E____ M____ NI____

Assists in the training and direction of page/shelvers.

E____ M____ NI____

Communicates to the next shift of clerks about any issues of importance or other updates.

E____ M____ NI____

PROCESSING _____ N/A

Repairs and/or reconditions damaged library materials.

E____ M____ NI____

Processes materials for circulation correctly and in a timely manner.

E____ M____ NI____

TECHNOLOGY

Effectively utilizes computer equipment, software, and peripherals to complete tasks.

E____ M____ NI____

Effectively answers phone calls, parks calls, or transfers calls to voicemail.

E____ M____ NI____

Employee Name: _____ Meeting Date: _____

Accurately enters transactions into the cash register for cash and check payments. Correctly processes refunds with documentation. Utilizes the cash register to make change.

E_____ M_____ NI_____

GENERAL TASKS

CUSTOMER SERVICE

Welcomes patrons as they walk into the Library; provides patient, respectful service.

E_____ M_____ NI_____

Respectfully assists library users of all abilities and demographics. Accommodates patrons with special needs.

E_____ M_____ NI_____

Applies effective techniques to address difficult situations with patrons and staff. Maintains composure under pressure.

E_____ M_____ NI_____

Maintains confidentiality of patron information.

E_____ M_____ NI_____

Keeps Circulation and Delivery areas tidy.

E_____ M_____ NI_____

Maintains a professional demeanor and appearance.

E_____ M_____ NI_____

Routinely reviews and understands the programs and services offered by the library.

E_____ M_____ NI_____

Refers patrons to the appropriate service point for assistance.

E_____ M_____ NI_____

POLICIES & PROCEDURES

Understands, implements, and explains library, MCFLS, and ILL policies as needed.

E_____ M_____ NI_____

Refers issues to Staff-in-Charge or supervisors when appropriate.

E_____ M_____ NI_____

CONTINUING EDUCATION

Maintains and grows professional skills through training and education.

E_____ M_____ NI_____

Employee Name: _____ Meeting Date: _____

TEAMWORK

Maintains positive relationships, communicates effectively, and acts as a team player.

E_____ M_____ NI_____

Assists with coverage of co-workers' shifts when needed.

E_____ M_____ NI_____

Accepts feedback, participates in staff meetings, and assists coworkers.

E_____ M_____ NI_____

TIMELINESS

Arrives on time and is ready to work when shift begins.

E_____ M_____ NI_____

Notifies supervisor of absences in timely manner (i.e. at least two hours before start of shift).

E_____ M_____ NI_____

Proactively requests and confirms coverage of missed shifts and communicates swaps/coverage with supervisor.

E_____ M_____ NI_____

ADAPTABILITY

Learns and performs new duties, and adapts to changing situations.

E_____ M_____ NI_____

EMERGENCY PREPAREDNESS

Is aware and understands the library policies and procedures relevant to emergency preparedness, including natural disasters and security situations.

E_____ M_____ NI_____

SUMMARY OF STRENGTHS AND GROWTH OPPORTUNITIES

1. Strengths

Comment on strengths, including skills, achievements, and contributions that have had a positive impact on the Library.

2. Growth Opportunities

Identify areas to expand skills or enhance performance in the coming year to support individual and organizational success.

Reviewing Supervisor's Signature: _____ Date: _____

* * * * *

Employee's Signature: _____ Date: _____

* * * * *

I (Director) acknowledge that I have reviewed this performance appraisal.

Director's Signature: _____ Date: _____

Employee Name: _____ Meeting Date: _____

**Whitefish Bay Public Library
Performance Appraisal for
Part-time Shelver Staff**



POSITION KNOWLEDGE

Understands and demonstrates basic knowledge of the Dewey Decimal System and other shelving categorization schemes specific to the Whitefish Bay Library.

Yes ____ Needs Improvement ____

Accurately sorts and shelves items in a timely manner.

Yes ____ Needs Improvement ____

Takes initiative to learn and master changes or updates in shelving procedures.

Yes ____ Needs Improvement ____

Able to quickly and efficiently check shelves for specific library materials for paging slips.

Yes ____ Needs Improvement ____

COMMUNICATION SKILLS

Communicates effectively and courteously with supervisor and other staff.

Yes ____ Needs Improvement ____

Maintains a professional demeanor and appearance.

Yes ____ Needs Improvement ____

INTERPERSONAL RELATIONS

Works effectively and courteously with other staff members and maintains a positive attitude.

Yes ____ Needs Improvement ____

Offers assistance to other staff members; helps out when seeing a need to do so.

Yes ____ Needs Improvement ____

Accepts constructive suggestions and is willing to act on them.

Yes ____ Needs Improvement ____

ATTENDANCE

Adheres to a regular work schedule, and is punctual for shifts.

Yes ____ Needs Improvement ____

Notifies supervisor about any absences. Finds own replacements as needed.

Yes ____ Needs Improvement ____

Swaps or covers shifts for co-workers.

Yes ____ Needs Improvement ____

Supervisor Comments:

Reviewing Supervisor's Signature: _____ Date: _____

Employee's Signature: _____ Date: _____

I (Director) acknowledge that I have reviewed this performance appraisal.

Director's Signature: _____ Date: _____

Employee Name: _____ Meeting Date: _____

**Whitefish Bay Public Library
Performance Appraisal for
Full-time & Part-time
Librarians and Reference Assistants**



DEPARTMENT SPECIFIC DUTIES

REFERENCE SERVICE & READER'S ADVISORY

Completes reference interview to effectively assist patrons.

E_____ M_____ NI_____

Assists patrons with placing holds or interlibrary loan requests.

E_____ M_____ NI_____

PROGRAMMING

Plans and implement programs and events; prepares displays and signage.

E_____ M_____ NI_____

Completes program support tasks as assigned.

E_____ M_____ NI_____

COLLECTION DEVELOPMENT

Completes collection development and weeding duties.

E_____ M_____ NI_____

Accurately completes cataloguing duties.

E_____ M_____ NI_____

TECHNOLOGY & DATABASES

Assists patrons with CountyCat, library databases, BadgerLink, and websites.

E_____ M_____ NI_____

Effectively provides basic computer help and operates library equipment.

E_____ M_____ NI_____

GENERAL DUTIES

CUSTOMER SERVICE

Welcomes patrons as they walk into the department; provides patient, respectful service.

E_____ M_____ NI_____

Respectfully assists library users of all abilities and demographics. Accommodates patrons with special needs.

E_____ M_____ NI_____

Applies effective techniques to address difficult situations with patrons and staff. Maintains composure under pressure.

E_____ M_____ NI_____

Employee Name: _____ **Meeting Date:** _____

Reveals the department to assist patrons.

E_____ M_____ NI_____

Maintains patron confidentiality.

E_____ M_____ NI_____

Keeps department tidy

E_____ M_____ NI_____

Maintains a professional demeanor and appearance.

E_____ M_____ NI_____

POLICIES & PROCEDURES

Understands, implements, and explains library, MCFLS, and ILL policies as needed.

E_____ M_____ NI_____

Refers issues to "staff in charge" or supervisors when appropriate.

E_____ M_____ NI_____

Serves as "staff in charge" when designated.

E_____ M_____ NI_____

CONTINUING EDUCATION

Maintains and grows professional skills through training and education.

E_____ M_____ NI_____

TEAMWORK

Maintains positive relationships, communicates effectively, and acts as a team player.

E_____ M_____ NI_____

Accepts feedback, participates in staff meetings, and assists coworkers.

E_____ M_____ NI_____

TIMELINESS

Arrives on time and is ready to work when shift begins.

E_____ M_____ NI_____

Notifies supervisor of absences in timely manner (i.e. at least two hours before start of shift).

E_____ M_____ NI_____

Assists with coverage when needed.

E_____ M_____ NI_____

Follow procedure to request time off.

E_____ M_____ NI_____

ADAPTABILITY

Learns and performs new duties, and adapts to changing situations.

E_____ M_____ NI_____

EMERGENCY PREPAREDNESS

Is aware and understands the library policies and procedures relevant to emergency preparedness, including natural disasters and security situations.

Employee Name: _____ **Meeting Date:** _____

E _____ M _____ NI _____

SUMMARY OF STRENGTHS, GROWTH OPPORTUNITIES, AND GOALS

1. Strengths

Comment on strengths, including skills, achievements, and contributions that have had a positive impact on the Library.

2. Growth Opportunities

Identify areas to expand skills or enhance performance in the coming year to support individual and organizational success.

3. Goals

List specific, measurable goals to be accomplished during the next calendar year. Goals should align with the employee's role, the library's mission, and strategic priorities.

Reviewing Supervisor's Signature: _____ Date: _____

Employee's Signature: _____ Date: _____

I (Director) acknowledge that I have reviewed this performance appraisal.

Director's Signature: _____ Date: _____

Employee Name: _____ Meeting Date: _____

**Whitefish Bay Public Library
Performance Appraisal for
Full-time
Head of Adult Services**



DEPARTMENT HEAD DUTIES

Works to implement strategic plan goals and department/team goals.

E_____ M_____ NI_____

Keeps Library Director apprised of department schedule, programs, projects, issues, and accomplishments.

E_____ M_____ NI_____

Effectively tracks, and remains within, department budget.

E_____ M_____ NI_____

Gathers statistics and data in a timely manner for monthly department report and annual report to DPI.

E_____ M_____ NI_____

Oversees day-to-day service and activities in the Adult Services department.

E_____ M_____ NI_____

Informs all staff about changes/updates/additions in the Adult Services department.

E_____ M_____ NI_____

Hires, trains, supervises, and coaches Adult Services staff to achieve Library and staff goals and objectives

E_____ M_____ NI_____

Manages marketing plan and website

E_____ M_____ NI_____

Completes all duties as listed for department staff when needed. (i.e. collection development, reference, programming)

E_____ M_____ NI_____

Based on your experience over the last two years, what updates or additions would make your job description more accurate?

GENERAL DUTIES

CUSTOMER SERVICE

Welcomes patrons as they walk into the department; provides patient, respectful service.

E_____ M_____ NI_____

Respectfully assists library users of all abilities and demographics. Accommodates patrons with special needs.

E_____ M_____ NI_____

Employee Name: _____ **Meeting Date:** _____

Applies effective techniques to address difficult situations with patrons and staff. Maintains composure under pressure.

E_____ M_____ NI_____

Maintains patron confidentiality.

E_____ M_____ NI_____

Maintains a professional demeanor and appearance.

E_____ M_____ NI_____

POLICIES & PROCEDURES

Understands, implements, and explains library, MCFLS, and ILL policies as needed.

E_____ M_____ NI_____

Serves as "staff in charge" when designated.

E_____ M_____ NI_____

CONTINUING EDUCATION

Maintains and grows professional skills through training and education.

E_____ M_____ NI_____

TEAMWORK

Maintains positive relationships, communicates effectively, and acts as a team player.

E_____ M_____ NI_____

Accepts feedback, participates in staff meetings, and assists coworkers.

E_____ M_____ NI_____

TIMELINESS

Arrives on time and is ready to work when shift begins.

E_____ M_____ NI_____

Notifies supervisor of absences in timely manner (i.e. at least two hours before start of shift).

E_____ M_____ NI_____

Assists with coverage when needed.

E_____ M_____ NI_____

Follow procedure to request time off.

E_____ M_____ NI_____

ADAPTABILITY

Learns and performs new duties, and adapts to changing situations.

E_____ M_____ NI_____

EMERGENCY PREPAREDNESS

Is aware and understands the library policies and procedures relevant to emergency preparedness, including natural disasters and security situations.

E_____ M_____ NI_____

Employee Name: _____ **Meeting Date:** _____

SUMMARY OF STRENGTHS, GROWTH OPPORTUNITIES, AND GOALS

1. Strengths

Comment on strengths, including skills, achievements, and contributions that have had a positive impact on the Library.

2. Growth Opportunities

Identify areas to expand skills or enhance performance in the coming year to support individual and organizational success.

3. Goals

List specific, measurable goals to be accomplished during the next calendar year. Goals should align with the employee's role, the library's mission, and strategic priorities.

Reviewing Supervisor's Signature: _____ Date: _____

Employee's Signature: _____ Date: _____

I (Director) acknowledge that I have reviewed this performance appraisal.

Director's Signature: _____ Date: _____

Employee Name: _____ Meeting Date: _____

**Whitefish Bay Public Library
Performance Appraisal for
Full-time
Head of Youth Services**



DEPARTMENT HEAD DUTIES

Works to implement strategic plan goals and department/team goals.

E_____ M_____ NI_____

Keeps Library Director apprised of department schedule, programs, projects, issues, and accomplishments.

E_____ M_____ NI_____

Effectively tracks, and remains within, department budget.

E_____ M_____ NI_____

Gathers statistics and data in a timely manner for monthly department report and annual report to DPI.

E_____ M_____ NI_____

Oversees day-to-day service and activities in the Youth Services department.

E_____ M_____ NI_____

Informs all staff about changes/updates/additions in the Youth Services department.

E_____ M_____ NI_____

Hires, trains, supervises, and coaches Youth Services staff to achieve Library and staff goals and objectives.

E_____ M_____ NI_____

Completes all duties as listed for department staff when needed. (i.e. collection development, reference, programming)

E_____ M_____ NI_____

Based on your experience over the last two years, what updates or additions would make your job description more accurate?

GENERAL DUTIES

CUSTOMER SERVICE

Welcomes patrons as they walk into the department; provides patient, respectful service.

E_____ M_____ NI_____

Respectfully assists library users of all abilities and demographics. Accommodates patrons with special needs.

E_____ M_____ NI_____

Employee Name: _____ **Meeting Date:** _____

Applies effective techniques to address difficult situations with patrons and staff. Maintains composure under pressure.

E_____ M_____ NI_____

Maintains patron confidentiality.

E_____ M_____ NI_____

Maintains a professional demeanor and appearance.

E_____ M_____ NI_____

POLICIES & PROCEDURES

Understands, implements, and explains library, MCFLS, and ILL policies as needed.

E_____ M_____ NI_____

Serves as "staff in charge" when designated.

E_____ M_____ NI_____

CONTINUING EDUCATION

Maintains and grows professional skills through training and education.

E_____ M_____ NI_____

TEAMWORK

Maintains positive relationships, communicates effectively, and acts as a team player.

E_____ M_____ NI_____

Accepts feedback, participates in staff meetings, and assists coworkers.

E_____ M_____ NI_____

TIMELINESS

Arrives on time and is ready to work when shift begins.

E_____ M_____ NI_____

Notifies supervisor of absences in timely manner. (i.e. at least two hours before start of shift)

E_____ M_____ NI_____

Assists with coverage when needed.

E_____ M_____ NI_____

Follow procedure to request time off.

E_____ M_____ NI_____

ADAPTABILITY

Learns and performs new duties, and adapts to changing situations.

E_____ M_____ NI_____

EMERGENCY PREPAREDNESS

Is aware and understands the library policies and procedures relevant to emergency preparedness, including natural disasters and security situations.

E_____ M_____ NI_____

Employee Name: _____ **Meeting Date:** _____

SUMMARY OF STRENGTHS, GROWTH OPPORTUNITIES, AND GOALS

1. Strengths

Comment on strengths, including skills, achievements, and contributions that have had a positive impact on the Library.

2. Growth Opportunities

Identify areas to expand skills or enhance performance in the coming year to support individual and organizational success.

3. Goals

List specific, measurable goals to be accomplished during the next calendar year. Goals should align with the employee's role, the library's mission, and strategic priorities.

Reviewing Supervisor's Signature: _____ Date: _____

Employee's Signature: _____ Date: _____

I (Director) acknowledge that I have reviewed this performance appraisal.

Director's Signature: _____ Date: _____

Employee Name: _____ Meeting Date: _____

**Whitefish Bay Public Library
Performance Appraisal for
Full-time
Head of Circulation Services**



DEPARTMENT HEAD DUTIES

Works to implement strategic plan goals and department/team goals.

E_____ M_____ NI_____

Keeps Library Director apprised of department schedule, programs, projects, issues, and accomplishments.

E_____ M_____ NI_____

Effectively tracks, and remains within, department budget.

E_____ M_____ NI_____

Gathers statistics and data in a timely manner for monthly department report and annual report to DPI.

E_____ M_____ NI_____

Oversees day-to-day service and activities in the Circulation Services department.

E_____ M_____ NI_____

Informs all staff about changes/updates/additions in the Circulation Services department.

E_____ M_____ NI_____

Hires, trains, supervises, and coaches Circulation Services staff to achieve Library and staff goals and objectives.

E_____ M_____ NI_____

Manages accounts payables and deposits.

E_____ M_____ NI_____

Manages technology plan.

E_____ M_____ NI_____

Completes all duties as listed for department staff when needed. (i.e. circulation, processing, shelving)

E_____ M_____ NI_____

Based on your experience over the last two years, what updates or additions would make your job description more accurate?

GENERAL DUTIES

CUSTOMER SERVICE

Welcomes patrons as they walk into the department; provides patient, respectful service.

E_____ M_____ NI_____

Employee Name: _____ **Meeting Date:** _____

Respectfully assists library users of all abilities and demographics. Accommodates patrons with special needs.

E_____ M_____ NI_____

Applies effective techniques to address difficult situations with patrons and staff. Maintains composure under pressure.

E_____ M_____ NI_____

Maintains patron confidentiality.

E_____ M_____ NI_____

Maintains a professional demeanor and appearance.

E_____ M_____ NI_____

POLICIES & PROCEDURES

Understands, implements, and explains library, MCFLS, and ILL policies as needed.

E_____ M_____ NI_____

Serves as "staff in charge" when designated.

E_____ M_____ NI_____

CONTINUING EDUCATION

Maintains and grows professional skills through training and education.

E_____ M_____ NI_____

TEAMWORK

Maintains positive relationships, communicates effectively, and acts as a team player.

E_____ M_____ NI_____

Accepts feedback, participates in staff meetings, and assists coworkers.

E_____ M_____ NI_____

TIMELINESS

Arrives on time and is ready to work when shift begins.

E_____ M_____ NI_____

Notifies supervisor of absences in timely manner. (i.e. at least two hours before start of shift)

E_____ M_____ NI_____

Assists with coverage when needed.

E_____ M_____ NI_____

Follow procedure to request time off.

E_____ M_____ NI_____

ADAPTABILITY

Learns and performs new duties, and adapts to changing situations.

E_____ M_____ NI_____

Employee Name: _____ **Meeting Date:** _____

EMERGENCY PREPAREDNESS

Is aware and understands the library policies and procedures relevant to emergency preparedness, including natural disasters and security situations.

E_____M_____NI_____

SUMMARY OF STRENGTHS, GROWTH OPPORTUNITIES, AND GOALS

1. Strengths

Comment on strengths, including skills, achievements, and contributions that have had a positive impact on the Library.

2. Growth Opportunities

Identify areas to expand skills or enhance performance in the coming year to support individual and organizational success.

3. Goals

List specific, measurable goals to be accomplished during the next calendar year. Goals should align with the employee's role, the library's mission, and strategic priorities.

Reviewing Supervisor's Signature: _____ Date: _____

Employee's Signature: _____ Date: _____

I (Director) acknowledge that I have reviewed this performance appraisal.

Director's Signature: _____ Date: _____



Public Library Trustee Training

Trustee Essentials Handbook

Chapters 10, 11, 13, 25

October 21, 2025

Trustee Orientation & Continuing Ed

Chapter 10 – Developing Essential Library Policies

Chapter 11 – Planning for the Library's Future

Chapter 13 – Library Advocacy

Chapter 25 – Liability Issues

From *Trustee Essentials: A Handbook for Wisconsin Public Library Trustees* (2015)

By Wisconsin Department of Public Instruction, Public Library Development Team

<https://dpi.wi.gov/libraries/public-libraries/governance-administration/trustees>

Trustee Orientation & Continuing Ed

Chapter 10 – Developing Essential Library Policies

Library policies provide the framework for daily operations, decision-making, and consistent service. They ensure the library meets community needs, uses resources wisely, and treats staff and patrons fairly.

Purpose and Responsibility

Library boards are responsible for approving both **external policies** (how the library serves the public) and **internal policies** (governing board and staff operations). Wisconsin Statutes §§43.52(2) and 43.58(4) authorize library boards to set reasonable regulations, manage library administration, and prescribe staff duties and compensation.

Policy Development Process

- The director drafts or revises policies with input from staff and, when appropriate, the public.
- The board reviews, revises, and approves policies during properly noticed public meetings.
- The director ensures that staff and the public are informed of adopted policies.
- Policies are reviewed regularly, ideally every three years, to ensure they remain current and effective.

From *Trustee Essentials: A Handbook for Wisconsin Public Library Trustees* (2015)

By Wisconsin Department of Public Instruction, Public Library Development Team

<https://dpi.wi.gov/libraries/public-libraries/governance-administration/trustees>

Trustee Orientation & Continuing Ed

Chapter 10 – Developing Essential Library Policies (Cont.)

Characteristics of Good Policies

Effective library policies:

- **Legal:** Comply with all statutes and court decisions.
- **Reasonable:** Apply fair standards and proportionate consequences.
- **Clear:** Avoid vague or subjective language.
- **Equitable:** Are applied consistently without discrimination.

Policies and Procedures

Policies define *what* the library does and *why*. Procedures define *how* tasks are accomplished. While the board sets policy, the library director develops and manages procedures to carry out board-approved policies. This distinction prevents board micromanagement and allows professional staff to administer daily operations effectively.

Implementation and Review

Policies should be compiled in a publicly accessible manual and/or made available online. Once adopted, all board members should support consistent implementation. Commonly challenged areas include materials selection and Internet access, where clear, legally defensible policies are essential.

Goal

Strong, current policies enable the library to provide equitable, high-quality service, ensure accountability, and align daily operations with its mission and long-range goals.

Trustee Orientation & Continuing Ed

Chapter 11 – Planning for the Library's Future

The Importance of Planning

Planning ensures that library services meet community needs, use resources wisely, and adapt to change. Just as no one would build a house without a blueprint, libraries need a plan to guide priorities and decisions. Without one, the library risks offering services that are unnecessary while overlooking what the community truly values.

Why Plan

Planning helps the board and staff understand their community, identify priorities, and set goals for the future. It creates a clear direction for growth and a record of decisions that guide daily operations and long-term development.

Getting Started

Every library, regardless of size, needs a plan. The process may be simple or detailed, but it should always involve gathering data about the community and the library's current services. Comparing local data to **Wisconsin Public Library Standards** helps identify gaps and opportunities for improvement.

Who to Involve

Effective planning includes input from multiple voices, such as library staff, municipal leaders, educators, community organizations, and residents. Engaging both library users and nonusers provides a fuller picture of community needs.

Trustee Orientation & Continuing Ed

Chapter 11 – Planning for the Library's Future (Cont.)

Gathering Information

Ask about community priorities rather than just library services. Surveys, focus groups, and conversations can uncover needs the library can help address. The goal is to connect community aspirations with library resources.

Creating the Plan

A simple plan includes:

- **Introduction:** Overview of process and findings.
- **Mission Statement:** The library's purpose and role in the community.
- **Service Priorities and Activities:** Goals and actions to achieve them.
- **Evaluation:** How progress and outcomes will be measured.

Plans can span one to five years and should be reviewed regularly to ensure continued relevance and effectiveness.

Specialized Planning

In addition to general strategic planning, libraries may develop focused plans for technology, facilities, or emergencies. These ensure readiness, continuity, and resilience in changing circumstances.

Summary

Planning is not a luxury; it is essential. A thoughtful plan aligns library services with community needs, strengthens accountability, and keeps the library moving toward a shared vision for the future.

Trustee Orientation & Continuing Ed

Chapter 13 – Library Advocacy

Advocacy is a key responsibility of every library trustee. Advocates understand the value of library services and communicate that value to the community and decision-makers.

Purpose

Trustees share clear, accurate information about library needs to build public and government support. Because trustees represent the community, they are often the most effective voices for sustainable funding and strong library services.

Priorities

Each year, the Library Board should identify a few advocacy goals, such as funding, technology, or facility improvements, and plan how to pursue them.

How to Advocate

Trustees can:

- Speak to community groups
- Communicate with local and state officials
- Write letters or articles supporting the library
- Participate in hearings or public meetings

Advocacy is ongoing work. Each effort strengthens community understanding and long-term support for the library.

Trustee Orientation & Continuing Ed

Chapter 25 – Liability Issues

Trustee Liability and Protection

Library trustees are generally protected from personal liability for actions taken in good faith while performing official duties. (Wis. Stat. §893.80[4])

Personal liability may occur for intentional misconduct, misuse of funds, ethics violations, or breaches of open meetings, public records, or constitutional laws. Open meetings violations can result in personal fines that cannot be reimbursed.

Because the municipality or county is ultimately liable for board actions, local attorneys are available to advise the library board. Municipalities also typically provide legal defense and cover damages for trustees acting within their duties (Wis. Stat. §895.46[1]).

Reducing Risk

Trustees should:

- Understand key laws affecting library governance.
- Maintain clear, updated policies.
- Vote responsibly and avoid conflicts of interest.
- Seek legal advice when uncertain.

Acting diligently, ethically, and within legal bounds provides trustees strong protection and helps safeguard the library's integrity.

Schedule

Trustee Essentials: A Handbook for Wisconsin Public Library Trustees (2015) has 27 chapters, plus an appendix. We will review 2-4 chapters per month.

Chapter 12 (April 29, 2025)

- Library Standards

Chapters 27, 1-4 (June 2025)

- Trustee Orientation and Continuing Education
- The Trustee Job Description
- Who Runs the Library?
- Bylaws – Organizing the Board for Effective Action
- Effective Board Meetings & Trustee Participation

Chapters 24, 26, Appendix A (July 2025)

- Library Friends and Library Foundation
- The Public Library System board – the Broad Viewpoint
- Important State and Federal Laws Pertaining to Public Library Operations

Chapters 8-9 (August 2025)

- Developing the Library Budget
- Managing the Library's Money

Chapters 22-23 (September 2025)

- Freedom of Expression and Inquiry
- Dealing with Challenges to Materials and Policies

Chapters 10-11, 13, 25 (October 2025)

- Developing Essential Library Policies
- Planning for the Library's Future
- Library Advocacy
- Liability Issues

Chapters 14-16 (November 2025)

- The Library Board and the Open Meetings Law
- The Library Board and the Public Records Law
- Ethics and Conflict of Interest Laws Applying to Trustees

Chapters 5-7, 19 (January 2026)

- Hiring a Library Director
- Evaluating the Director
- The Library Board and Library Personnel
- Library Director Certification

Chapters 17-18 (February 2026)

- Membership in the Library System
- Library Board Appointments & Composition

Chapters 20-21 (March 2026)

- The Library Board and Building Accessibility
- The Library Board and Accessible Services

To: Whitefish Bay Public Library Board of Trustees
From: Nyama Y. Reed, Library Director
Date: October 21, 2025 Meeting
Re: Director's Reports



- 1) Building – Regular maintenance continues on schedule.
- 2) Village
 - a) 2026 Budget Book to be distributed to Village Board and department heads the week of October 20.
 - b) Health insurance quotes were received the week of October 13 from United Healthcare and the State plan. The Village Board will discuss details in a closed session October 20.
- 3) 2025 Strategic Plan
 - a) Patron Survey: The patron survey launched Monday, September 29, and over 400 responses were received within 24 hours. As of October 17 there were 633 responses. Results will be presented to the Library Board at the November 18 meeting.
 - b) The survey was sent to the Library's email list of 6,300 people and had an open rate of 73%. The survey was also shared via the Village's e-newsletter, Facebook groups WFB Villagers and WFB Parents, Facebook post "boost," and signage inside the library with QR codes. Print copies were available in-library but not were turned in.
 - c) A 10% response rate is considered acceptable. Previous library survey responses were 544 in 2018, 1,012 in 2018, and 814 in 2021.
 - d) A final email reminder will be sent October 17 and the survey closes October 19.
- 4) Friends of the Library – The Fall Book Sale, scheduled for Friday, 10/31 through Sunday, 11/2.
- 5) MCFLS
 - a) At the last LDAC meeting, members approved creating a \$100,000 Overdrive/Libby Lucky Day collection to help meet demand for digital materials, especially e-audiobooks. Steve Hesel of MCFLS will work with selectors to implement this before year-end. Hesel also notified Midwest Tape that ten libraries will discontinue hoopla in 2026
 - b) Baker & Taylor, a major national book wholesaler serving libraries and bookstores, announced it will cease operations by January 2026. The company is now only filling orders for items currently in stock and will not fulfill backorders. WFBPL staff identified about 500 titles on backorder, cancelled those orders, and reordered through Ingram. New books are arriving daily.

Libraries nationwide, including MCFLS members, are struggling to find reliable replacements for Baker & Taylor. Many are temporarily using a mix of vendors such as Ingram, Amazon, Barnes & Noble, and local bookstores, resulting in reduced efficiency. Milwaukee Public Library (MPL) is particularly affected due to its acquisitions system's reliance on Baker & Taylor. The vendor's closure also ends a system-wide discount negotiated by MPL, which had provided significant savings for all member libraries.
- 6) Foundation
 - a) Work is in progress on the year-end fundraising campaign.
 - b) As of August 30, the endowment balance at Greater Milwaukee Foundation is \$205,000 and there is a \$13,000 balance at Associated Bank.
 - c) The Foundation Donor Wall will be installed soon, hopefully by Thanksgiving.
- 7) Wisconsin Library Association – Theresa and I will attend the annual conference in Middleton, Tuesday, October 28 through Friday, October 31, as part of the conference planning committee.