



City of Fort Atkinson  
Dwight Foster Public Library  
209 Merchants Avenue  
Fort Atkinson, WI 53538

**LIBRARY BOARD MEETING  
IN PERSON AND VIA ZOOM  
MONDAY, OCTOBER 13, 2025 – 9:30 AM  
FCCU COMMUNITY ROOM (MAIN FLOOR OF LIBRARY)**

<https://us02web.zoom.us/j/85079409884?pwd=bEl6SnRHcGhNeVVTSp5S0loa1lJdz09>

Meeting ID: 850 7940 9884

Passcode: J3dEeSUL

Dial by Location

+1 312 626 6799

If you have special needs or circumstances which may make communication or accessibility difficult at the meeting, please call (920) 563-7790 at least three (3) days prior to the meeting date. Accommodations will, to the fullest extent possible, be made available on request by a person with a disability.

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**AGENDA**

- 1. Call meeting to order**
- 2. Roll call**
- 3. Approval of Minutes**
  - a. Review and possible action relating to the minutes of the September 8 regular meeting
- 4. Financial Report**
  - a. Discussion relating to the October financial report of the library (Lippert)
- 5. Approval of Bills**
  - a. Review and possible action relating to the library's bills (Lippert)
- 6. Public Input**
- 7. Reports**
  - a. Director's Report
  - b. Friends of the Library Liaison Report

## **8. Unfinished Business**

- a. Review and possible action relating to a potential native plant garden donation on the library's north lawn (Lippert)

## **9. New Business**

- a. Discussion relating to the status of the trust held at Edward Jones (Lippert)

## **10. Miscellaneous**

- a. Trustee Training: Discussion relating to Trustee Essentials Chapter 12 "Library Standards" (Lippert)  
<https://vimeo.com/showcase/11330550?video=1002055352>

## **11. Adjournment**

### *Library Board Meeting Dates*

- *Monday, January 13, 2025 at 9:30 a.m.*
- *Monday, February 10, 2025 at 9:30 a.m.*
- *Monday, March 10, 2025 at 9:30 a.m.*
- *Monday, April 14, 2025 at 9:30 a.m.*
- *Monday, May 12, 2025 at 9:30 a.m.*
- *Monday, June 9, 2025 at 9:30 a.m.*
- *Monday, August 11, 2025 at 9:30 a.m.*
- *Monday, September 8, 2025 at 9:30 a.m.*
- *Monday, October 13, 2025 at 9:30 a.m.*
- *Monday, November 10, 2025 at 9:30 a.m.*
- *Monday, December 8, 2025 at 9:30 a.m.*

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**LIBRARY BOARD MINUTES**  
**MONDAY, SEPTEMBER 8, 2025–9:30AM**  
**ROTARYROOM (2<sup>ND</sup> FLOOR OF LIBRARY)**

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**1. Call meeting to order:** Julie Olver called the meeting to order at 9:34 am

**Roll call:** Present: Rob Abbott, Laura Becker, Lori Compas, Sarah Dorfman, Rebecca Houseman, Kyle Jacobson, Leslie LaMuro, Davin Lescohier, Julie Olver, Sara Podoll, Duane Scott, Sara Scullen, Minetta Lippert.

**2. Approval of Minutes** – Move to approve minutes from August 11 board meeting by Duane Scott, 2<sup>nd</sup> by Laura Becker, all approved

**3. Financial Report**

- a. Discussion relating to the September financial report of the library  
Minetta pointed out that we will add more to the postage projected budget.

**4. Approval of Bills:** After discussion Davin Lescohier moved to approve, 2<sup>nd</sup> by Kyle Jacobson, all approved.

**5. Public Input:** No Public input

**6. Reports**

- a. Director's Report: Highlights: Molley Sawyer started as full time cataloger, Marlene Gerstner and Wendy Wagner joined the library team as part-time desk assistants and Sofia Zelenskaya joined as a part-time page. Looking into replacing the analog phone system; Minetta has talked to AT&T, Ignatek, and Gordon Flesch. Book drop compressor out of commission will need to look into replacing the book sorting machinery initial estimate is \$150,000.00 that is based on only one estimate. Board realizes that this is a very large cost and will need to come out of the trust, Minetta will get additional estimates before moving forward and get approval from the board of trustees. Front door threshold buckled and Fort Glass made the repairs. The fall program guide is out compiled by staff members. Library working again with school district to get students library cards. New puzzle collection is doing well, there are 282 available and already 76 have been checked out. Minetta met with Rebecca Houseman city manager and Michelle Ebert, clerk treasurer to discuss the 2026 budget request. She also presented the 2024 library service annual report to the county board on August 12<sup>th</sup>. Minetta watched some of the Trustee training videos and they are helpful.
  - Trustees received an invitation by email for the Bridges' Trustee appreciation event on Tuesday, September 30 from 6-8 p.m. at the

Johnson Creek Community Center. Minetta will be attending and encouraged board to attend.

- b. Friends of the Library Liaison Report: Julie Olver mentioned that the annual meeting for the Friends of the Library will be on Thursday, September 11 at 6 pm in the community room. Claire Swinarski, author, will talk about her latest book. Friend's membership renewal begins at the end of the month.

## **7. Unfinished Business**

- a. Review progress relating to the Beautification Council's library bike rack replacement project – Minetta said there has been no progress yet.

## **8. New Business**

- a. Discuss 2025 Summer Reading Program report: The report was sent in the board packet and the program was very successful. Over 1000 people attended over 51 events. The snake discovery visit was popular. The princess story time was well attended with many children dressed as princesses and Pokémon characters. The author event with Nickolas Butler was well attended.
- b. Review and possible action relating to the 2026 library operating budget: The finance committee met in August to review that budget. Minetta shared an overview with a budget comparison between actual from 2025 and projected for 2026. 70% of the budget is for staff wages and benefits, 11% building maintenance and 9% for collections. Overall planning to keep the budget flat however the new phones will be more costly as well as maintenance and Overdrive costs going up. The AV budget line is lower due to canceling Hoopla but Bridges and Overdrive cost will go up as well as tech costs for Ignatek. The 2026 county revenue will increase by \$7,357 compared to 2025. The 2026 adjacent county revenue will increase by \$5,288 compared to 2025. The library's 2026 budget request includes a \$27,000 increase in funds from the City's tax levy.

Move to approved 2026 operating budget, Leslie LaMuro, 2<sup>nd</sup> by Lori Compas, all approved.

- c. Review and possible action relating to 2026-2031 Capital Improvement Project plans and a commitment to reimburse 2026 CIP items with funds from the library's trust - CIP plans include PC computer replacements this is in the budget every 5 years, the computers are heavily used by both staff and community, \$5000.00 cost. Plan to replace the book drop sorting machine which breaks down often. The cost is approximately \$150,000.00 is 15 years old. Replace the phone system at a cost of \$5000.00. 2027 plan to conduct a building assessment in conjunction with the Hoard Museum in a combined RFP at a cost of \$10,000.00. All CIP expenses will be brought before the Library

Board again for final approval.

Motion to approved CIP budget and a commitment to reimburse from the Trust. Moved by Sara Podoll, 2<sup>nd</sup> by Davin Lescohier, all approved.

- d. Review and possible action relating to a potential native plant garden donation on the library's north lawn- Margaret Schroeder & Paul Smyth proposed a donation of native plant garden along the north facing wall that is 4ft. x 30 ft. long. The installation would be done by Tall Grass and should be 5 ft away from the street. The Schroeders would maintain the garden. A motion to continue discussing the native plant donation upon seeing a site plan prior to moving forward. Moved by Sara Scullen, 2<sup>nd</sup> by Sarah Dorfman, all approved.

## 9. Miscellaneous

- a. Trustee Training: Discussion relating to Trustee Essentials Chapter 11 "Planning for the Library's Future" Minetta said that she found the video very informative. Strategic planning is highly important. Julie said that it's important to have a plan with actionable items with staff involvement in the planning. Leslie pointed out that strategic plans should be mission driven and include as Julie said actionable items.
- b. <https://vimeo.com/showcase/11330550/video/1000947380>

**10. Adjournment:** Sara Podoll moved to adjourn the meeting, 2<sup>nd</sup> by Davin Lescohier, all approved. Meeting was adjourned at 10:29 a.m.

Respectfully submitted by:

Leslie LaMuro, secretary

### *Library Board Meeting Dates*

- *Monday, October 13, 2025 at 9:30 a.m.*
- *Monday, November 10, 2025 at 9:30 a.m.*
- *Monday, December 8, 2025 at 9:30 a.m.*



## October 2025 Financial Report

Expense Fund Accounts	Description	City Budget	Spent	\$ left in budget	Expected costs	Expected revenue	Projected left in budget
15-55-5511-0100	<a href="#">Salaries - Regular (FT)</a>		\$360,000.00	\$267,370.28			\$92,629.72
15-55-5511-0200	<a href="#">Salaries - Part Time</a>		\$130,000.00	\$103,368.09			\$26,631.91
15-55-5511-0300	<a href="#">Salaries - Janitor</a>		\$23,000.00	\$16,210.91			\$6,789.09
15-55-5511-2500	<a href="#">Benefits</a>		\$204,000.00	\$137,075.23			\$66,924.77
	<b>Total Salaries and Benefits</b>		<b>\$717,000.00</b>	<b>\$524,024.51</b>			<b>\$192,975.49</b>
15-55-5511-0600	<a href="#">Supplies</a>		\$20,000.00	\$16,250.08		\$4,905.00	\$8,654.92
15-55-5511-0700	<a href="#">Postage (Acct 38806)</a>		\$800.00	\$1,202.43			-\$402.43
15-55-5511-0800	<a href="#">Insurance</a>		\$6,500.00	\$7,028.74			-\$528.74
15-55-5511-0900	<a href="#">Telephone</a>		\$400.00	\$713.41			-\$313.41
15-55-5511-1000	<a href="#">Electricity and Water</a>		\$39,000.00	\$26,531.77			\$12,468.23
15-55-5511-1100	<a href="#">Natural Gas</a>		\$14,000.00	\$5,200.65			\$8,799.35
15-55-5511-1200	<a href="#">Maint. &amp; Repair</a>		\$26,000.00	\$28,369.47			-\$2,369.47
15-55-5511-1300	<a href="#">Books</a>		\$66,700.00	\$46,281.72			\$20,418.28
15-55-5511-1400	<a href="#">Other</a>		\$800.00	\$1,078.62			-\$278.62
15-55-5511-1500	<a href="#">Periodicals</a>		\$4,800.00	\$1,651.19			\$3,148.81
15-55-5511-1600	<a href="#">A.V.</a>		\$26,000.00	\$15,974.81			\$10,025.19
15-55-5511-1700	<a href="#">Summer Reading Program</a>		\$3,750.00	\$5,486.85		\$2,525.00	\$788.15
15-55-5511-1800	<a href="#">Continuing Ed &amp; Travel</a>		\$2,000.00	\$1,680.14			\$319.86
15-55-5511-1900	<a href="#">Information Sources/Services</a>		\$54,000.00	\$52,284.99			\$1,715.01
15-55-5511-2000	<a href="#">Programming</a>		\$8,000.00	\$7,652.74			\$347.26
	<b>Total Operations/Services</b>		<b>\$272,750.00</b>	<b>\$217,387.61</b>			<b>\$55,362.39</b>
	<b>Total Operating Budget</b>		<b>\$989,750.00</b>	<b>\$741,412.12</b>			<b>\$248,337.88</b>
15-60-0065-1100	<a href="#">CIP Furniture Replacement</a>		\$7,000.00	\$0.00			\$7,000.00
15-60-0065-1105	<a href="#">CIP Server replacement</a>		\$14,000.00	\$10,634.50			\$3,365.50
15-60-0065-1103	<a href="#">CIP Computers</a>		\$5,000.00	\$2,423.32			\$2,576.68
15-60-0065-1104	<a href="#">CIP Carpet/Flooring</a>		\$4,000.00	\$0.00			\$4,000.00
15-60-0065-1102	Emergency HVAC Repair		\$0.00	\$0.00			\$0.00
	<b>Grand Totals:</b>		<b>\$1,019,750.00</b>	<b>\$754,469.94</b>			<b>\$265,280.06</b>

Revenue Fund Accounts	Description	Budget	Revenue:
15-44-0044-6000	LIBRARY-ADJ COUNTY FUNDING (R)	\$19,344.73	\$19,344.56
15-44-0044-6120	Jeff. Co. Aid	\$298,147.00	\$298,147.00
15-44-0044-6100	LIBRARY-Copy, Scan, Fax, Print	\$7,000.00	\$5,710.39
15-44-0044-6110	LIBRARY-Fines	\$1,200.00	\$1,344.32
15-47-0047-1100	<a href="#">Donations and Grants</a>	\$8,000.00	\$24,779.28
15-42-0042-1000	State/Fed Misc Revenue	\$0.00	\$106.75
15-44-0044-6135	Trust Contributions (CIP)	\$30,000.00	\$0.00
15-44-0044-6135	Trust Contributions (Additional Requests)	\$87,550.00	\$0.00
15-41-0041-1100	General Property Taxes	\$624,000.00	\$624,000.00
15-48-0048-1200	Insurance Recoveries	\$0.00	\$0.00
15-49-0049-9999	Fund Balance Applied	\$32,058.27	\$0.00
		<b>\$1,107,300.00</b>	<b>\$973,432.30</b>
	Donations (Edward Jones)	\$0.00	\$2,000.00

**Current Funds**

Community Foundation balance:	Edward Jones trust balance:	Fund Balance (12/31/2024)
\$75,733.40	\$1,085,706.77	\$81,695.00

**Signatures of Approval:**

Library Director	Board of Trustees	

Invoice Number	Description	Total Cost	GL Account and Title
<b>AMAZON CAPITAL SERVICES</b>			
113Y-P1FQ-G4QX	1 THE LAST OLYMPIAN (PERCY JACKSON AND THE OLYMPIANS, BOOK 5)ASIN: 1423101472SOLD BY: AMAZON.COM SERVICES, INCORDER #114-1388566- 7137863	9.59	15-55-5511-1300 LIBRARY-Books
11KC-73QG-7VYG	2 BOOKS	22.53	15-55-5511-1300 LIBRARY-Books
11WC-HP7P-NP6C	12 PACK CLEAR TOTE BAG, STADIUM APPROVED SECURITY CLEAR BAG12"X12"X6", STURDY PVC CONSTRUCTION ZIPPERED TOP, PERFECT FORWORK, SCHOOL, SPORTS GAMES AND CONCERTS	40.47	15-55-5511-0600 LIBRARY-Supplies
11WD-FTLN-9FVC	2 BOOKS	31.90	15-55-5511-1300 LIBRARY-Books
137W-143F-T9N6	1GENUINE JOE PINK LOTION HAND SOAP REFILL, RICH LATHER, 1 GALLON, 4COUNT	43.20	15-55-5511-0600 LIBRARY-Supplies
1474-PMLJ-M7GV	JIGSAW PUZZLES	503.35	15-55-5511-1400 LIBRARY-Other
14C3-77H3-94GR	2 BOOKS	26.65	15-55-5511-1300 LIBRARY-Books
14RW-CLPJ-1LCM	SEELOOWY 36 PCS KEYBOARD FIDGET TOY FIDGET CLICKER KEYBOARDKEYCHAIN DECOMPRESSION RELIEF TOYS BUTTON STRESS RELIEF GIFTS FORADULTS KIDS PASS THE TIME (CLASSIC COLOR)	23.99	15-55-5511-2000 LIBRARY-Programming
14RW-CLPJ-1LCM	APAKKAI 600 PCS CUTE STICKERS FOR KIDS, WATER BOTTLE STICKERS FORTEENS, KAWAII VINYL PHONE LAPTOP SKATEBOARD ANIMAL WATERPROOFSTICKER, BULK AESTHETIC STICKER PACKS FOR BOYS GIRLS TEACHER	9.99	15-55-5511-2000 LIBRARY-Programming
161V-QPM7-9Y6X	BATTERY REPLACEMENT	19.98	15-55-5511-0600 LIBRARY-Supplies
167H-6DWX-374J	COONYARD (2-PACK) 3.6V 1200MAH LS14250 1/2AA LITHIUM BATTERYREPLACEMENT FOR SAFT LS14250 LS14250BA LS3 LS3BA ER14250TL-5101 TL- 5151 UTILITY WATER GAS ELECTRICITY METER	-19.98	15-55-5511-0600 LIBRARY-Supplies
1691-MQRP-96HY	SCOTCH THERMAL LAMINATING POUCHES, 200 COUNT, CLEAR, 3 MIL.,IDEAL OFFICE OR SCHOOL SUPPLIES, FITS LETTER SIZED PAPER	21.24	15-55-5511-2000 LIBRARY-Programming
1691-MQRP-96HY	GRACIAS . THANKS (ENGLISH AND SPANISH EDITION)	31.16	15-55-5511-2000 LIBRARY-Programming
16C4-NYG4-643T	1AVERY PRINTABLE		

Invoice Number	Description	Total Cost	GL Account and Title
	ADDRESS LABELS WITH SURE FEED, 1" X 2-5/8", PASTELBLUE, 750 BLANK MAILING LABELS (5980)	15.46	15-55-5511-0600 LIBRARY-Supplies
16LC-DY67-NRDX	AMAZON BASICS 8-PACK 9V ALKALINE BATTERIES, 5-YEAR SHELF LIFE - FORSMOKE/CO DETECTOR, ELECTRONICS & AUDIO	12.69	15-55-5511-0600 LIBRARY-Supplies
1793-DPF4-9KTV	BOOKS	63.24	15-55-5511-1300 LIBRARY-Books
19MJ-HXRV-9669	DGYBDFC DISPLAYPORT TO DUAL DISPLAYPORT SPLITTER DUAL 4K120HZOR 4K144HZ+4K60HZ EXTEND/COPY DISPLAY ADAPTER SST/MSTDISPLAY PORT SPLITTER FOR 2 MONITORS	37.99	15-55-5511-0600 LIBRARY-Supplies
19W4-CDTR-GCQD	1984 - BOOK	16.71	15-55-5511-1300 LIBRARY-Books
1CDX-NNWP-C69V	INSPIRE BLACK NITRILE GLOVES   THE ORIGINAL QUALITY BLACKDISPOSABLE GLOVE LATEX FREE   4.5 MEDICAL COOKING CLEANINGMECHANIC CASE OF 1000 SIZE L	66.49	15-55-5511-0600 LIBRARY-Supplies
1CV3-RRK6-VKPY	BLACK+DECKER DUSTBUSTER ADVANCEDCLEAN CORDLESS HANDHELDDVACUUM, COMPACT HOME AND CAR VACUUM WITH CREVICE TOOL(CHV1410L)	49.99	15-55-5511-0600 LIBRARY-Supplies
1CXF-T1RL-1L39	27 BOOKS	254.30	15-55-5511-1300 LIBRARY-Books
1DGH-9CFY-FMCK	3 BOOKS	42.32	15-55-5511-1300 LIBRARY-Books
1FJY-46XX-6X4G	AIIBE 10 PIECES 32GB USB FLASH DRIVE 10 PACK USB 2.0 MEMORYSTICK THUMBDRIVES (MIX COLORS : BLACK BLUE RED GREEN ORANGEWHITE YELLOW PINK PURPLE SILVER)	28.79	15-55-5511-0600 LIBRARY-Supplies
1G4M-RM3N-7NK3	3 BOOKS	51.72	15-55-5511-1300 LIBRARY-Books
1GXN-R4HL-9X1T	1SOUR PATCH KIDS AND SWEDISH FISH MINI SOFT & CHEWYHALLOWEEN CANDY VARIETY PACK, BULK CANDY, 80 TRICK OR TREAT BAGS	18.96	15-55-5511-2000 LIBRARY-Programming
1GYH-FMJV-FFGK	12 SET - FULHAM LIGHTING WH2-120-C WORKHORSE 2 VERSATILEFLUORESCENT LAMP BALLAST, 120V	76.03	15-55-5511-1200 LIBRARY-Maint. & Repairs
1HG7-PJLR-KHP6	2 HAMNETASIN: 1984898876SOLD BY: AMAZON.COM SERVICES, INCORDER # 112-5805400-2622600	14.86	15-55-5511-1300 LIBRARY-Books
1HG7-PJLR-KHP6	1TROUBLE IN QUEENSTOWN:		

Invoice Number	Description	Total Cost	GL Account and Title
	A MYSTERY (THE VANDY MYRICK MYSTERIES, 1)ASIN: 1250904218SOLD BY: AMAZON.COM SERVICES, INCORDER #112-5805400-2622600	14.00	15-55-5511-1300 LIBRARY-Books
1HRK-LYXX-G9WX	GENERIC MAGNETIC DIGITAL CLOCK FOR KITCHEN - TIMER WITH ALARM,12/24 HOURS, BIG SCREEN, LOUD ALARM & STRONG MAGNET - COUNT-UP& COUNT DOWN FOR BAKING, SPORTS, OFFICE, STUDY - BLACK, 3.34X2.83INCH	8.69	15-55-5511-0600 LIBRARY-Supplies
1JKY-K773-MWQH	1FEBREZE ODOR-FIGHTING FABRIC REFRESHER WITH GAIN, ORIGINAL, 16.9 FLOZ, PACK OF 2	7.51	15-55-5511-0600 LIBRARY-Supplies
1JW3-VYVM-DC1X	LISTENING TO THE LAW: REFLECTIONS ON THE COURT AND CONSTITUTIONASIN: 0593421868SOLD BY: AMAZON.COM SERVICES, INCORDER # 113-2649338-1707416	17.60	15-55-5511-1300 LIBRARY-Books
1JW3-VYVM-DC1X	MOTHER MARY COMES TO MEASIN: 1668094711SOLD BY: AMAZON.COM SERVICES, INCORDER # 113-2649338-1707416	16.50	15-55-5511-1300 LIBRARY-Books
1K1F-NGHG-CTCK	1CARD HOLDER FOR YOTO CARDS RINGS AND TABS 200 PCS SELFADHESIVE TABS WITH 10 LOOPS KIDS TRAVEL CARRIER OF YOTOACCESSORIES CARD HOLDER ORGANIZER STORAGE CASE	17.08	15-55-5511-0600 LIBRARY-Supplies
1K4J-X4KR-9HGL	SUMMER PEOPLE: A NOVELASIN: 0312628277SOLD BY: AMAZON.COM SERVICES, INCORDER #113-3170533-0532267	10.45	15-55-5511-1300 LIBRARY-Books
1K4J-X4KR-9HGL	HOW BAD THINGS CAN GETASIN: 172827026XSOLD BY: AMAZON.COM SERVICES, INCORDER # 113-3170533-0532267	10.79	15-55-5511-1300 LIBRARY-Books
1KGL-PJHG-KX7W	THE ART THIEF, 11 COPIES FOR ADULT BOOK CLUB	125.11	15-55-5511-2000 LIBRARY-Programming
1KRW-MVQ6-CGR3	BOOKS	190.09	15-55-5511-1300 LIBRARY-Books
1L1G-V6JH-1DLK	1 TILL SUMMER DO US PART (STANDARD EDITION)	24.40	15-55-5511-1300 LIBRARY-Books
1L43-CPQY-47CV	SOFTLY, AS I LEAVE YOU: LIFE AFTER ELVIS	17.60	15-55-5511-1300 LIBRARY-Books
1LTM-T9C3-31T7	PAW PATROL: FIRE RESCUE	8.45	15-55-5511-1600 LIBRARY-A.V.
1PK4-T4TQ-6CJR	LUNA OSCURA, TWO COPIES		

Invoice Number	Description	Total Cost	GL Account and Title
1QP3-G4FQ-44M9	FOR STORYWALK	24.86	15-55-5511-2000 LIBRARY-Programming
	HOW TO TRAIN YOUR DRAGON (2025) - COLLECTOR'S EDITION [DVD] ASIN: B0F9L2R8ZSSOLD BY: AMAZON.COM SERVICES, INCORDER #112-3033668- 8297810	19.95	15-55-5511-1600 LIBRARY-A.V.
1QXC-V11V-DMDW	1CLEANSMART DAILY SURFACE CLEANER AND PET- SAFE DISINFECTANT, KILLS99.9% OF VIRUSES, BACTERIA, 23 OUNCE BOTTLE (PACK OF 2)	17.29	15-55-5511-0600 LIBRARY-Supplies
1RYT-476M-1MR9	CALENDAR 2025-2026, MONTHLY WALL CALENDAR FROM OCTOBER 2025 TOJUNE 2027, 11.5" X 14.7", SPIRAL BINDING HANGING WALL CALENDAR,PERFECT FOR HOME OR OFFICE, FLORAL	5.98	15-55-5511-0600 LIBRARY-Supplies
1TYW-DPKX-PCNC	AMAZON BASICS REPORT FOLDER COVER WITH CLIP, PACK OF 10, GREY, 9X 10.5 INCHES	7.89	15-55-5511-0600 LIBRARY-Supplies
1TYW-DPKX-PCNC	18-PACK CRUISE LUGGAGE TAG HOLDER, CRUISE LUGGAGE TAG HOLDERCAN BE USED FOR 2025CARNIVAL, NCL, MSC CRUISES, AND PRINCESSSHIPS OFFER	8.99	15-55-5511-0600 LIBRARY-Supplies
1V14-HLDV-7V4Y	MARKERS, JAR, CUPS	21.53	15-55-5511-2000 LIBRARY-Programming
1VFR-17PD-16KR	THE BOOK THIEF (ANNIVERSARY EDITION)	15.85	15-55-5511-1300 LIBRARY-Books
1VKJ-6D9W-P9XG	YA 7 BOOKS	89.67	15-55-5511-1300 LIBRARY-Books
1VXM-GPR1-GR9V	JUV BOOKS	95.67	15-55-5511-1300 LIBRARY-Books
1W4R-K4QQ-9K6R	36 PACK SMALL WOODEN BOX UNFINISHED WOOD TREASURE BOXES WITHLID FOR DIY CRAFTS (3.5 X 2.1 X 1.9 IN)	43.69	15-55-5511-2000 LIBRARY-Programming
1W4R-K4QQ-9K6R	FORT KNOX GOLD COINS 1LB NET BAGS, FULL SIZE	15.90	15-55-5511-2000 LIBRARY-Programming
1W4R-K4QQ-9K6R	3GEM STICKERS, 1510PCS RHINESTONE STICKERS FOR CRAFTS, SELFADHESIVE JEWEL STICKERS, ACRYLIC BLING GEMS JEWELS STICKERS FORCRAFTS, STICK ON GEMS FOR DIY, CRAFTS, CRAFT SUPPLIES FOR KIDS	6.59	15-55-5511-2000 LIBRARY-Programming
1WGC-CNVW-LNX	1NAVIGATING DIFFICULT SITUATIONS IN PUBLIC LIBRARIES: THE PLA GUIDE TOTRAUMA-INFORMED DE- ESCALATION	49.99	15-55-5511-1800 LIBRARY-Continuing Ed & Travel
1WGC-FLMK-4C6L	GENUINE JOE PINK LOTION		

Invoice Number	Description	Total Cost	GL Account and Title
	HAND SOAP REFILL, RICH LATHER, 1 GALLON, 4COUNT	-43.20	15-55-5511-0600 LIBRARY-Supplies
1WPC-R4WK-1N3	ADULT BOOKS 4	67.29	15-55-5511-1300 LIBRARY-Books
1WQG-FFXD-L7JX	EEMB 4PACK ER14505 AA 3.6V LITHIUM BATTERY LI-SOCLNON-RECHARGEABLE BATTERY SB-AA11 LS14500 TL-5903 SL-360S7-400 ER14500 FOR SENSOR WATER ELECTRICITY METER GAS	16.51	15-55-5511-0600 LIBRARY-Supplies
1XFM-CG41-V6FD	LOVE ON A WHIM: (A HEARTWARMING CONTEMPORARY CLEAN ROMANCESERIES SET IN SMALL-TOWN CAPE COD) (CAPE COD CREAMERY)	12.02	15-55-5511-1300 LIBRARY-Books
1XFM-CG41-V6FD	THE SECRET TO HAPPINESS: (A HEARTWARMING CONTEMPORARY CLEANROMANCE SERIES SET IN SMALL-TOWN CAPE COD) (CAPE CODCREAMERY)	13.75	15-55-5511-1300 LIBRARY-Books
1XWR-J93Y-GGHH	BOOKS	20.65	15-55-5511-0600 LIBRARY-Supplies
1Y1J-9L94-1F9G	4 BOOKS	69.87	15-55-5511-1300 LIBRARY-Books
1YQ6-XVX3-DDPM	3 BOOKS	43.85	15-55-5511-1300 LIBRARY-Books
1YT7-FQ9R-DNGR	TWISTED LOVE, NIGHT OVER WATER	23.73	15-55-5511-1300 LIBRARY-Books
Total AMAZON CAPITAL SERVICES:		2,630.21	
<b>AT &amp; T</b>			
8-28-25	SERVICE	65.52	15-55-5511-0900 LIBRARY-Telephone
8-28-25	SERVICE	65.52	15-55-5511-0900 LIBRARY-Telephone
Total AT & T:		131.04	
<b>BRODART CO</b>			
Aug Sep 2025 Brod	AUDIOBOOKS	229.50	15-55-5511-1600 LIBRARY-A.V.
Aug Sep 2025 Brod	BOOKS	5,150.23	15-55-5511-1300 LIBRARY-Books
Total BRODART CO:		5,379.73	
<b>CARLEE HEIN</b>			
9-22-25	MILEAGE REIMBURSEMENT	47.60	15-55-5511-1800 LIBRARY-Continuing Ed & Travel
Total CARLEE HEIN:		47.60	
<b>CENTER POINT LARGE PRINT</b>			
2193725	8 LARGE PRINT BOOKS	202.56	15-55-5511-1300 LIBRARY-Books
Total CENTER POINT LARGE PRINT:		202.56	
<b>CENTURYLINK</b>			
752264686	STATE PROGRAM/LONG DISTANCE SERVICE #9	5.06	15-55-5511-0900 LIBRARY-Telephone

Invoice Number	Description	Total Cost	GL Account and Title
Total CENTURYLINK:		5.06	
<b>CHARTER COMMUNICATIONS</b>			
170837201092125	#10 LIBRARY	190.56	15-55-5511-1900 LIBRARY-Information Sourc/Serv
Total CHARTER COMMUNICATIONS:		190.56	
<b>DEMCO INC</b>			
7689782	3 MAGNETIC NAME TAGS, 2 ROLLS FILMOLUX LAMINATE	116.97	15-55-5511-0600 LIBRARY-Supplies
7694547	ENGRAVED MAGNETIC NAME TAG, 2 BOXES LABEL PROTECTORS, 1 ROLL FILMOLUX, 5 PACKAGES BOOKMARKS	130.77	15-55-5511-0600 LIBRARY-Supplies
7703921	8 PACKAGES BOOKMARKS, 2 ROLLS FILM-FIBER TAPE	94.08	15-55-5511-0600 LIBRARY-Supplies
Total DEMCO INC:		341.82	
<b>DWIGHT FOSTER PUBLIC LIBRARY</b>			
Library Petty Cash	DOMINO'S PIZZA FOR POOL PARTY	65.00	15-55-5511-1700 LIBRARY-Summer Reading Progra
Library Petty Cash	CASH TO PAY LIFEGUARD FOR SRP POOL PARTY	65.00	15-55-5511-1700 LIBRARY-Summer Reading Progra
Library Petty Cash	USPS: 4 ILL PACKAGES	19.13	15-55-5511-0700 LIBRARY-Postage
Library Petty Cash	BLODGETT DIRT TO REPOT PLANTS	17.99	15-55-5511-0600 LIBRARY-Supplies
Sept 2025 Petty Ca	PICK N SAVE: SNACKS FOR CIRC MEETING	23.87	15-55-5511-0600 LIBRARY-Supplies
Sept 2025 Petty Ca	MARK MORAN FOR ANTIQUES APPRAISAL EVENT	450.00	15-55-5511-2000 LIBRARY-Programming
Sept 2025 Petty Ca	USPS: ILL PACKAGES AND STAMPS	202.33	15-55-5511-0700 LIBRARY-Postage
Total DWIGHT FOSTER PUBLIC LIBRARY:		843.32	
<b>FESTIVAL FOODS</b>			
Festival August 202	REFRESHMENTS FOR STAFF GOING AWAY PARTY	22.55	15-55-5511-0600 LIBRARY-Supplies
Festival August 202	LEMONADE	62.57	15-55-5511-0600 LIBRARY-Supplies
Festival August 202	REFRESHMENTS FOR STAFF TRAINING	66.28	15-55-5511-0600 LIBRARY-Supplies
Festival August 202	REFRESHMENTS FOR SRP POOL PARTY	46.82	15-55-5511-1700 LIBRARY-Summer Reading Progra
Total FESTIVAL FOODS:		198.22	
<b>FORT ATKINSON GLASS/MIRROR INC</b>			
263415	LABOR AND PARTS TO FIX FRONT DOOR THRESHOLD	166.00	15-55-5511-1200 LIBRARY-Maint. & Repairs
Total FORT ATKINSON GLASS/MIRROR INC:		166.00	

Invoice Number	Description	Total Cost	GL Account and Title
<b>G.F.C. LEASING</b>			
1053310	#10 FOR 2025	528.92	15-55-5511-1900 LIBRARY-Information Sourc/Serv
Total G.F.C. LEASING:		528.92	
<b>GALE/CENGAGE LEARNING</b>			
999100884095	2 LARGE PRINT BOOKS	55.18	15-55-5511-1300 LIBRARY-Books
999100884096	2 LARGE PRINT BOOKS	42.88	15-55-5511-1300 LIBRARY-Books
999101112217	1 LARGE PRINT BOOK	18.19	15-55-5511-1300 LIBRARY-Books
999101114643	1 LARGE PRINT BOOK	24.04	15-55-5511-1300 LIBRARY-Books
Total GALE/CENGAGE LEARNING:		140.29	
<b>HOOPLA OR MIDWEST TAPE LLC</b>			
507652535	3 DVDS, 1 CD	95.96	15-55-5511-1600 LIBRARY-A.V.
507679074	DIGITAL AUDIOBOOKS, DIGITAL BINGEPASSES, DIGITAL COMICS, DIGITAL EBOOKS, DIGITAL MOVIES, DIGITAL MUSIC, DIGITAL TELEVISION	904.63	15-55-5511-1600 LIBRARY-A.V.
507822490	HOOPLA DIGITAL CHECKOUTS FOR MONTH ENDING 9/30/2025	895.70	15-55-5511-1600 LIBRARY-A.V.
Total HOOPLA OR MIDWEST TAPE LLC:		1,896.29	
<b>IGNATEK LLC</b>			
22950	BILL FOR MONTHLY TECH SERVICES	837.66	15-55-5511-1900 LIBRARY-Information Sourc/Serv
23189	MONTHLY BILLING FOR MANAGED IT	852.66	15-55-5511-1900 LIBRARY-Information Sourc/Serv
Total IGNATEK LLC:		1,690.32	
<b>J.F. AHERN CO INC</b>			
760835	HVAC INSPECTIONS FOR 9/1/2025-8/31/2026	5,400.00	15-55-5511-1200 LIBRARY-Maint. & Repairs
Total J.F. AHERN CO INC:		5,400.00	
<b>JIM'S JANITORIAL SERVICE LLC</b>			
15630	GENERAL CLEANING 8/18/2025-8/29/2025	850.00	15-55-5511-0300 LIBRARY-Salaries Janitor
15632	GENERAL CLEANING 9/1/2025- 9/12/2025	850.00	15-55-5511-0300 LIBRARY-Salaries Janitor
15637	GENERAL CLEANING 9/15/2025-9/26/2025	850.00	15-55-5511-0300 LIBRARY-Salaries Janitor
Total JIM'S JANITORIAL SERVICE LLC:		2,550.00	
<b>JP MORGAN CHASE BANK-WIRE</b>			
4578	OTC BRAND-COLORING UTILITY BELTS	41.64	15-55-5511-2000 LIBRARY-Programming
4578	DPSP-ELEVATOR INSPECTION FEES	153.38	15-55-5511-1200 LIBRARY-Maint. & Repairs

Invoice Number	Description	Total Cost	GL Account and Title
4578	AMERICAN LIBRARY-MEMBERSHIP	125.00	15-55-5511-1800 LIBRARY-Continuing Ed & Travel
4603	PLANET CHAOS-BOARD GAMES	113.95	15-55-5511-1400 LIBRARY-Other
Total JP MORGAN CHASE BANK-WIRE:		433.97	
<b>KAPCO</b>			
1502566	3 ROLLS EASY BIND REPAIR TAPE, 1 PACKAGE POLYESTER WINGS	89.09	15-55-5511-0600 LIBRARY-Supplies
1502678	2 ROLLS OF EASY JACKET	96.70	15-55-5511-0600 LIBRARY-Supplies
Total KAPCO:		185.79	
<b>MIDWEST TAPE</b>			
507669211	4 DVDS	102.71	15-55-5511-1600 LIBRARY-A.V.
507697663	2 CDS, 1 AUDIOBK, 3 DVDS	135.94	15-55-5511-1600 LIBRARY-A.V.
507728627	2 CDS, 2 DVDS	88.16	15-55-5511-1600 LIBRARY-A.V.
507776419	1 DVD	20.24	15-55-5511-1600 LIBRARY-A.V.
Total MIDWEST TAPE:		347.05	
<b>OPPORTUNITIES INC</b>			
PSI675593	MOLLEY SAWYER BCARD - QTY 100	37.00	15-55-5511-0600 LIBRARY-Supplies
PSI675593	CARLEE HEIN BCARD - QTY 100	37.00	15-55-5511-0600 LIBRARY-Supplies
Total OPPORTUNITIES INC:		74.00	
<b>PACKERLAND RENT-A-MAT INC</b>			
3242162	MONTHLY MAT SERVICE	45.74	15-55-5511-1200 LIBRARY-Maint. & Repairs
3249763	MONTHLY MAT SERVICE	45.74	15-55-5511-1200 LIBRARY-Maint. & Repairs
Total PACKERLAND RENT-A-MAT INC:		91.48	
<b>PENWORTHY COMPANY</b>			
0611045-IN	13 JUV BOOKS	233.56	15-55-5511-1300 LIBRARY-Books
Total PENWORTHY COMPANY:		233.56	
<b>QUILL CORPORATION</b>			
45656944	3 BOXES OF WHITE COPY PAPER	128.97	15-55-5511-0600 LIBRARY-Supplies
Total QUILL CORPORATION:		128.97	
<b>SCHOLASTIC LIBRARY PUBLISHING</b>			
75161943	2 JUV BOOKS	32.48	15-55-5511-1300 LIBRARY-Books
75161954	4 JUV BOOKS	65.00	15-55-5511-1300 LIBRARY-Books
Total SCHOLASTIC LIBRARY PUBLISHING:		97.48	

Invoice Number	Description	Total Cost	GL Account and Title
<b>WE ENERGIES</b>			
9-19-25	#8 GAS	235.39	15-55-5511-1100 LIBRARY-Natural Gas
9-19-25	#8 ELECTRIC	2,943.01	15-55-5511-1000 LIBRARY-Electricity and Water
Total WE ENERGIES:		3,178.40	
<b>WILLOW LANE EDUCATION</b>			
ARR2601122	3 JUV BOOKS	78.97	15-55-5511-1300 LIBRARY-Books
Total WILLOW LANE EDUCATION:		78.97	
Grand Totals:		27,191.61	

## Library Director's Report October 2025

### Staff

- New staff members have been settling in well at the library.
- Our new cataloger Molley Sawyer has been collaborating with Carlee on social media marketing efforts.



### Maintenance of Facility and Equipment

- City Electrician Nick Armstrong fixed the lights in the Boyer Room and the Teen Room.
- Total Mechanical informed me that the replacement rooftop condenser is scheduled to be shipped on October 22, 2025. Once Total Mechanical has inspected the unit, we will schedule the replacement work.
- Luke from J.F. Ahern performed fall preventive maintenance at the library in September. Ahern recommends that we replace the pressure gauge and air intake on boiler one. We will correct these deficiencies.
- The library's and museum's lawn mower was out of service for a while as it was being repaired at the City shop.
- I met with DJ Scullin from the school district on September 17 to discuss phone and other technology solutions.

### Programs and Services

- Library staff collaborated with the School District of Fort Atkinson to create 185 new library cards for students whose families' opted in during the school registration process. New library cards were mailed out in September.
- Deb used funding from Brides Library System's adult programming grant to bring Mark Moran from Iola, Wisconsin to the library for an antiques appraisal event. Attendees really enjoyed the program and are already thinking about which items they would like to bring if we host this program again in the future!
- Daphne is organizing a new program called Explore Together that brings homeschooling families on field trip experiences around Fort Atkinson. In September, the group toured the Fireside Theatre in Fort Atkinson.





- Since we launched our online room reservation software on July 31, 2025, about 20% of the room reservations have been initiated by patrons online. I will now start including meeting room usage details on the monthly statistical report that I prepare for the Board each month.

#### Collections, Displays, and Marketing

- Staff member Debbie May is displaying her mini teacup collection in the case next to the second floor service desk in September and October. Staff and patrons have loved this new display!
- The local chapter of the Daughters of the American Revolution set up a display in the Jones Gallery to commemorate Constitution Week that ran from September 17-23, 2025.
- In September and October, the Jones Gallery featured a display by Society's Assets with the themes of "Ability Not Disability" and "Everyone Can." Staff have received positive comments about the display.

#### Budget/Donations

- Several community members donated to the Dwight Foster Public Library in memory of Pat Pelky. Pat was a longtime library user and will be missed greatly by library staff. Her obituary says, "She was an avid reader and loved the Dwight Foster Public Library in Fort Atkinson. She got her whole family into reading."
- I participated in the City's budget workshop on Wednesday, October 8.
- At their October 9 meeting, the Friends of the Library approved funding to purchase three area rugs from JM Carpets for the storytime room and the reference room to replace stained rugs.
- Dorothy Otting's generous donation was transferred from the transitional IRA at Edward Jones to the library's regular Edward Jones trust in early October.

## Bridges/APL/Jefferson County Library Service



- The Dwight Foster Public Library, along with other libraries throughout the Bridges Library System, launched the new Vega Discover catalog on September 8. Patron reactions have been mixed. The biggest benefit is that different formats of the same title will “roll up.” The old catalog still exists and is called the “classic catalog.”
- We applied for and received a Bridges Library System grant for \$500 to purchase 22 large format puzzles for our new circulating puzzle collection. The grant request was inspired by a patron’s comment that she is always looking for 500-piece large format puzzles for her aging parent because the pieces are easier to see and hold.
- I attended Jefferson County’s budget hearing about Jefferson County library service on Wednesday, September 17. Jefferson County staff and Finance Committee members continue to be supportive of fair and adequate funding for county libraries.
- I attended Bridges Library System’s trustee appreciation event on Tuesday, September 30.
- The Dwight Foster Public Library hosted Bridges Library System’s Alliance of Public Librarians (APL) meeting on Friday, October 10.

**Dwight Foster Public Library**  
**Monthly Statistical Report**

**September 2025**

<b>Library collection:</b>	Aug 2025	Sept 2025	Sept 2024
Items in collection	97,014	<b>97,867</b>	91,225
Number of item records created	460	<b>750</b>	587
Number of items deleted	109	<b>567</b>	480

<b>Circulation by material type:</b>	Aug 2025	Sept 2025	Sept 2024
<b>Selected book circulation:</b>			
Book	4,140	<b>3,831</b>	3,643
Browsing (Lucky Day Book)	43	<b>35</b>	26
Children's book	5,835	<b>5,896</b>	5,490
New book (nonfiction)	353	<b>361</b>	304
New fiction	523	<b>431</b>	443

<b>Selected AV circulation:</b>	Aug 2025	Sept 2025	Sept 2024
Blu-Ray	59	<b>73</b>	96
Browsing AV (Lucky Day AV)	19	<b>25</b>	35
CD	200	<b>136</b>	188
CD book	216	<b>187</b>	179
Children's Blu-Ray	15	<b>15</b>	6
Children's CD	6	<b>3</b>	3
Children's CDBook	47	<b>52</b>	25
Children's digital audiobook (+/YA Playaway)	83	<b>39</b>	57
Children's DVD	444	<b>343</b>	513
DVD	1,484	<b>1,382</b>	1,473
Nonfiction DVD	63	<b>1,382</b>	81
Playaway	94	<b>56</b>	69

<b>Selected other circulation:</b>	Aug 2025	Sept 2025	Sept 2024
Book club kits	7	<b>9</b>	5
Children's magazine	54	<b>14</b>	18
Library of things	334	<b>319</b>	218
Magazine	114	<b>83</b>	201
<b>Total physical item circulation:</b>	<b>14,309</b>	<b>13,590</b>	13,369

<b>Digital circulation:</b>	Aug 2025	Sept 2025	Sept 2024
Hoopla	395	<b>382</b>	526
Overdrive ebooks and digital audiobooks	2,899	<b>2,847</b>	2,607
Overdrive magazines	394	<b>419</b>	219
<b>Total digital item circulation:</b>	<b>3,688</b>	<b>3,648</b>	3,352

<b>Circulation by patron statistical class:</b>	Aug 2025	Sept 2025	Sept 2024
City of Fort Atkinson circulation:	7,678	<b>7,414</b>	7,506
Jefferson County "City" circulation:	1,743	<b>1,553</b>	1,071
Jefferson County Rural circulation:	3,648	<b>3,374</b>	3,624
<b>Total:</b>	<b>14,108</b>	<b>13,328</b>	13,145

<b>Patrons in the building:</b>	Aug 2025	Sept 2025	Sept 2024
Total number of patrons	6,004	<b>5,930</b>	6,256
Largest day/number	Aug 18/357	<b>Sept 22/360</b>	Sept 24/388
Smallest day/number	Aug 30/115	<b>Sept 8/144</b>	Sept 21&28/153

<b>Meeting rooms:</b>	Aug 2025	Sept 2025	Sept 2024
Number of room reservations	203	<b>268</b>	
Number of patron-initiated reservations	36 (17.7%)	<b>56 (20.8%)</b>	

<b>Public computers and wifi use:</b>	Aug 2025	Sept 2025	Sept 2024
Number of users of public internet computers	656	<b>624</b>	750
Hours of public internet computer use	507	<b>429</b>	461
Number of unique wireless clients	890	<b>914</b>	959
Average daily wireless visits	74	<b>85</b>	96
Wifi total data transferred	2.35 TB	<b>2.13 TB</b>	1.53 TB

<b>Patron questions at desks:</b>	Aug 2025	Sept 2025	Sept 2024
Reference interactions	115	<b>131</b>	157
General/Directional	137	<b>176</b>	188
Technical assistance	292	<b>311</b>	344
Circulation	38	<b>43</b>	103
Conflict/Resolution	3	<b>0</b>	4

<b>Other:</b>	Aug 2025	Sept 2025	Sept 2024
Books mended	152	<b>65</b>	56
AV mended	290	<b>85</b>	40
Copy machines	7,962	<b>10,276</b>	8,959
Outgoing faxes	66	<b>12</b>	81
Incoming faxes	9	<b>67</b>	11

<b>Resource sharing:</b>	Aug 2025	Sept 2025	Sept 2024
Outgoing ILL	103	<b>99</b>	109
Incoming ILL	21	<b>25</b>	26
DFPL items shipped to other libraries	2,072	<b>2,228</b>	2,042
Holds received at DFPL	2,281	<b>2,390</b>	2,460

<b>Programs and attendance:</b>	Aug 2025	Sept 2025	Sept 2024
Young child (0-5) programs/attendance	0 prog/0 att	<b>21 prog/369 att</b>	13 prog/171 att
Child (6-11) programs/attendance	1 prog/7 att	<b>6 prog/120 att</b>	0 prog/0 att
Young adult (12-18) programs/attendance	1 prog/21 att	<b>4 prog/15 att</b>	2 prog/4 att
Adult (19+) programs/attendance	2 prog/30 att	<b>6 prog/88 att</b>	9 prog/208 att
General interest (all ages) programs/attendance	0 prog/0 att	<b>0 prog/0 att</b>	1 prog/8 att
<b>Total programs/attendance:</b>	<b>4 prog/58 att</b>	<b>37 prog/592 att</b>	25 prog/305 att



Tallgrass Restoration, LLC  
 Cameron Cass  
 3221 E. County Road N  
 Milton WI 53563-9633

Phone: 608-531-1768  
 Fax: 608-531-2227

CCass@tallgrassrestoration.com

# Proposal

Date	8/26/2025
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Proposal #	19271
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**Our Milton address has changed to: 3221 E County Road N**

Schroeder Margaret  
 501 Sherman Ave. East  
 Fort Atkinson, WI 53538

920-342-2217  
 margaret8schroeder@charter.net

## Prairie Install '26

Description	Qty	U/M	Rate	Total
Herbicide Application- Tallgrass will conduct two prep visits (one in fall '25 and the other in spring '26) for a spring planting.	2	Each	126.00	252.00T
Mulching- Tallgrass will Mulch the area following the first treatment to create a cleaner look and suppress aggressive weedy regrowth.	1	Each	102.00	102.00T
Native Planting- Tallgrass will acquire and install 32 native 2.5" plugs of varying species and install supplemental with what the client provides as well.	1	Each	340.00	340.00T
Stewardship- Tallgrass will conduct up to two stewardship visits to maintain health of the new planting and manage invasive presence. Activities can include spot treatment, spot mowing, hand pulling, and general site assessment.	2	Visit	155.00	310.00T
Pesticide labels are available upon request at no additional charge.				
Sales Tax - 5.5%			5.50%	55.22

<b>Total</b>	<b>\$1,059.22</b>
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\_\_\_\_\_  
 Sales/Project Manager, Tallgrass Restoration, LLC

\_\_\_\_\_  
 Date

Acceptance of Proposal: The above prices and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. All deletions have been noted. I am familiar with and agree to the terms and conditions attached. To accept this proposal, please sign on the line below and return the signed original to Tallgrass Restoration, LLC.

\_\_\_\_\_  
 Client Representative

\_\_\_\_\_  
 Date

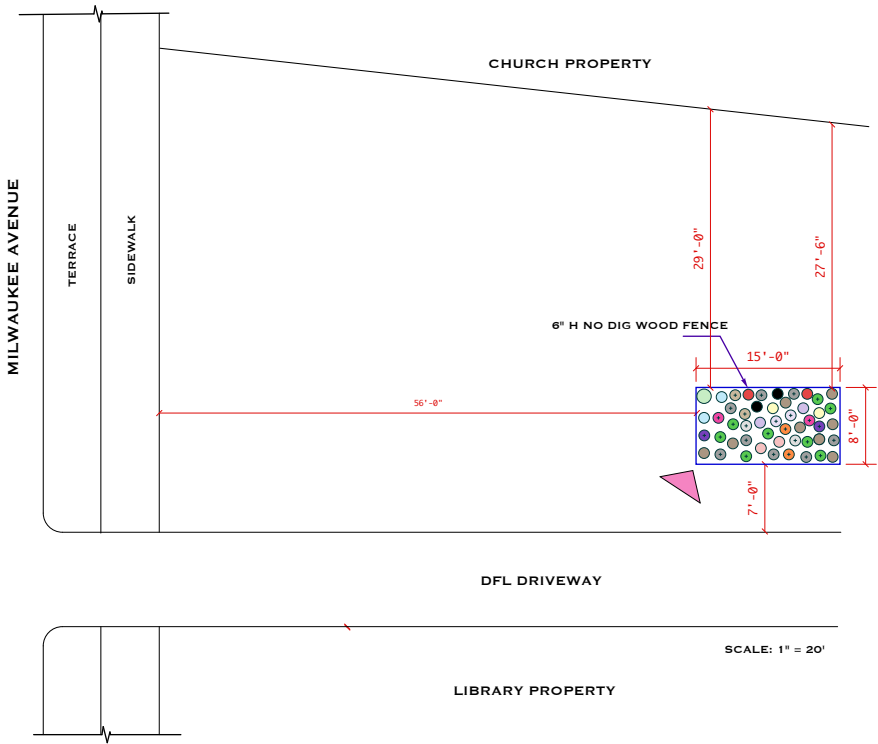
This proposal includes term and conditions attached and constitutes a binding contract agreement upon acceptance. Tallgrass Restoration, LLC is fully covered by insurance. Our employment practices are fully compliant with applicable State and Federal laws and regulations. TGR's warranty is conditioned upon timely payment of invoices, normal plant care by the client, and contracted and performed stewardship/maintenance activities for consecutive growing seasons following the installation of the plant material. All materials are at wholesale prices and include shipping and handling fees.

PERENNIAL GARDEN FOR:  
**DWIGHT FOSTER LIBRARY**  
 CITY OF FORT ATKINSON,  
 FORT ATKINSON, WI

NOTES:

DATE	REVISIONS
10/10/25	LIBRARY BOARD MEETING

DRAWING:  
**SITE PLAN**  
 SHEET NO:  
**A-O.1**



- ▲ INTERPRETIVE SIGN
- BLACK-EYED SUSAN (2)
  - PURPLE CONE FLOWER (2)
  - COMMON MILKWEED (2)
  - WILD BERGAMONT (2)
  - BUTTERFLY MILKWEED (2)
  - DAISY VARIETY (2)
  - ASTER VARIETY (4)
  - JOE PYE (1)
  - GREY-HEADED CONE (2)
  - PENSTEMON (2)
  - PURPLE VERVAIN (2)
  - ROUGH BLAZINGSTAR (2)
  - PRAIRIE SMOKE (8)
  - SIDE OATS (8)
  - DOTTED MINT (8)
- TOTAL: 57 PLANTS



SCALE: 1" = 20'

## Maintenance Plan

### Dwight Foster Library Native Wisconsin Wildflower and Prairie Restoration Project 2025-2026-2027

209 Merchants Avenue, Fort Atkinson, Wisconsin 53538

- I. Fall 2025: Tallgrass will apply an environmentally safe herbicide application to designated area
- II. Fall 2025: Tallgrass will mulch said area to suppress aggressive weeds and to create a cleaner look. Margaret and Paul will place five inch high wooden border fencing around area to enhance curb appeal.
- III. Early Spring 2026: Tallgrass will make second application of environmentally safe herbicide.
- IV. May 2026: Native planting consisting of a total of 57 plants (32 from Tallgrass and 25 from Margaret and Paul's Native Garden--see Jill's site plan). Theoretically, this Native Planting could also be a Library children's activity.
- V. Summer and Fall 2026: Tallgrass will make two "Stewardship" visits to garden consisting of managing invasive species, spot treatments, hand pulling, and general site assessment.
- VI. Late Spring and early Fall 2027: Two more "Stewardship" visits by Tallgrass consisting of managing invasive species, spot treatments, hand pulling, and general site assessment.

From step IV onward, Margaret Schroeder and Paul Smyth will make weekly maintenance visits to monitor garden site, do spot weeding and collaborate with Director Lippert as requested. Margaret can be reached at 920-342-2217 and Paul at 920-342-6080.

## Company Profile

Tallgrass Restoration, LLC has served Illinois, Indiana, and southern Wisconsin for over twelve years. Our environmental scientists and licensed professionals have the experience, qualifications and passion to restore your property to an unmatched state of beauty and ecological health.

Our cost-effective projects begin with a free on-site consultation and continue with ongoing annual stewardship. We are committed to creating a secure relationship with our clients that allows for the establishment of sustainable landscapes that enrich and benefit the heritage of plants, animals and people.

Tallgrass Restoration specializes in:

- Prairie, Savanna, Woodland & Wetland Restoration
- Invasive Brush Clearing
- Prescribed Burning
- Natural Areas Consulting and Design
- Erosion Control
- Shoreline Restoration and Stabilization
- Drill Seeding and Native Plant Installation
- Custom Herbicide Applications
- Stewardship and Maintenance
- Grant Coordination
- Plant Community Inventories & Mapping
- Native Seed Collection

### Illinois Office

2221 Hammond Dr.  
Schaumburg, IL 60173  
P: (847) 925-9830  
F: (847) 925-9840

### Wisconsin Office

3219 E. County Rd N.  
Milton, WI 53563  
P: (608) 531-1768  
F: (608) 531-2227

[info@tallgrassrestoration.com](mailto:info@tallgrassrestoration.com)

[www.tallgrassrestoration.com](http://www.tallgrassrestoration.com)



# tallgrass

 RESTORATION, LLC

We restore the health, integrity and beauty of our clients' land and water resources

## Shoreline Restoration

Erosion, whether sudden or gradual, can be a distressing and dangerous problem. Rip-rap stone or turf grass might seem like solutions, but water will undercut and erode these unstable barriers. Stone and lawn grasses also cannot prevent chemical run-off from polluting the water and may contribute to unsightly algal blooms.

We restore the integrity and beauty of your shoreline by establishing a stable, diverse community of native plants whose deep, fibrous root systems can resist

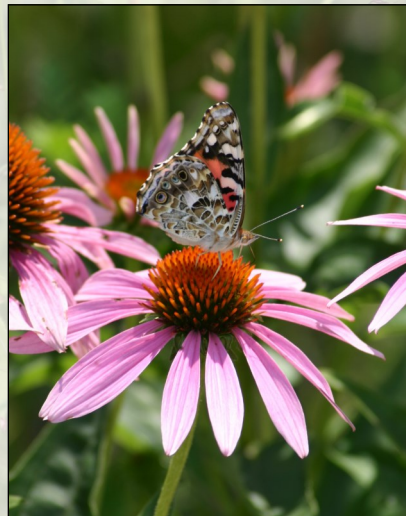


erosion and absorb chemical run-off. Our stewardship program will nurture the young native plants through the first few critical growing seasons. Once the plants are established your site will have a long-term, living solution at a project cost less than most traditional erosion control applications.

## Birds & Butterflies

Rain gardens, native plant beds, prairies and savannas provide for a beautiful, hardy and drought tolerant landscape. Whether your concerns are to reduce site maintenance and storm water runoff or to simply attract more birds and butterflies, the use of native plants makes for a wise investment.

We can recommend a balanced and appropriate selection of native plants for use in your landscape. Whether you install live plants or simply start from seed, we work with you to choose the ideal species for your soil, shade, hydrology and personal requirements. Utilizing our ongoing stewardship program after initial installation will ensure a garden you can be proud of.



## Stewardship



herbicide application, chainsawing, ecological mowing, and native planting and seeding in the rehabilitation of your land. Our ongoing monitoring and stewardship is essential to the successful establishment of the native plant community and is the key to fending off aggressive weed species.

Invasive species are a constant threat to the health and diversity of your land. These non-natives grow quickly, spread profusely, and re-sprout easily. Controlling these species is one of our specialties.

We begin clearing the invasive species through a program specifically tailored to your site. Our licensed professionals use a combination of controlled fire, selective



## Nature's Renewal

Most ecosystems native to the Midwest depend upon periodic fire to rejuvenate growth and ensure long-term survival. Modern tendencies to suppress fire have allowed weeds to out-compete our native grasses and forbs, which has reduced plant and animal diversity in the process.

Fire is one of the ideal management tools for stimulating native plant growth and controlling undesirable species. For over a decade our trained ecologists have



been using prescribed fire to repair the landscape. After inspecting the site and acquiring any necessary permits we prepare and implement a detailed, site specific burn plan. We safely burn on any scale, from backyards to natural areas hundreds of acres in size.



Above:  
After installation

Below:  
June one year  
after installation





Above:  
July two years  
after installation

Below:  
December three  
years after  
installation



# Tallgrass Restoration, LLC Terms and Conditions

Terms of Agreement. These Terms and Conditions apply to the attached proposal and any subsequent proposals or changes to existing contracts between Tallgrass Restoration, LLC (TGR) and the Client.

This proposal is valid for a period of 45 days from the date of submission. The scope of work is identified in the proposal. If Client acceptance and authorization is not received within 45 days, TGR reserves the right to withdraw the proposal or in TGR's sole option, adjust equitably and limited to the costs, schedule for completion, and overall scope of work to account for the delay. TGR also reserves the right to equitably adjust the contract if the Client alters the scope of work presently included in the proposal.

Payment, FEES: Unless otherwise stated on the proposal, fees are on a lump sum basis for services rendered. Invoices will not exceed the proposal amount unless the Client has authorized a change order for additional services or expenses.

CHANGE ORDERS: Change orders will be executed in writing. If a proposal states that professional services will be rendered on a time and materials basis, a rate schedule will be indicated within the proposal. Services billed on a time-and-materials basis will also include costs of travel time to/from project sites and, for consulting projects, time spent on report preparation by professional, technical or clerical staff. If it becomes reasonably apparent that the proposed estimate is not sufficient to complete the project in a satisfactory manner, TGR shall notify the Client prior to exceeding the prescribed total cost estimate for the project.

SALES TAX: Sales tax will be added if required by local jurisdiction. Clients claiming tax exempt status must submit a copy of their official tax exempt status form including their tax exempt number in order to waive the sales tax.

INVOICING: At TGR's election, invoices may be issued after the work described in this agreement is complete or progress billings may be issued upon completion of the various stages of this project. Payment is due Net 30 days from date of invoice. A 1.5% per month service charge is added to all accounts more than 45 days past due. Client shall reimburse TGR for all costs and expenses, including court costs and reasonable attorneys' fees, incurred by TGR in collecting delinquent fees for services performed as part of this agreement.

MATERIALS & MATERIAL DEPOSIT: All materials offered by TGR are at wholesale prices and include shipping and handling fees. Prior to work beginning, Client shall remit to Tallgrass Restoration, LLC 50% of the contract total as a deposit on materials and/or supplies necessary to complete contracted work. The required deposit is due upon execution of the agreement and must be remitted prior to the commencement of work.

Right of Entry. The Client will furnish commercially reasonable right-of-access on the land and water for TGR staff to perform necessary fieldwork and investigations. Delays on occurrence of weather will result in an adjustment to the project schedule.

Client Responsibilities. Unless otherwise specified, the Client is responsible for providing water to newly installed plants and seed at reasonable intervals for a period of 45 days following installation. Where necessary, the Client must locate and flag buried private utilities and property including but not limited to irrigation systems, underground storage tanks, private cables and other hidden obstacles/hazards in the work area. Any additional work due to buried obstructions, large rocks, or other unforeseen objects or conditions will be discussed with the Client and billed at Time and Material rates. TGR shall not be responsible for damages to any underground private property unless the underground property has been located and flagged by the Client in advance. The Client shall indemnify and hold TGR harmless from any and all damages or claims arising from the Client's failure to locate and flag underground private utilities and property.

Where applicable and necessary, the Client shall at no charge to TGR make adequate storage areas available on site for all equipment, materials and plant materials required to complete the project.

Where applicable and necessary, the Client must provide a reasonably adequate and accessible water supply on site for watering needs of this project. If this supply is not available or dependable, it will result in an added charge and/or loss of any plant material guarantee.

Insurance. TGR is currently licensed by the States of Illinois, Indiana and Wisconsin for application of herbicides for commercial purposes. This certification/permit requires the existence of insurance for liability coverage. TGR exceeds this coverage to provide additional general liability and professional services liability at a minimum of \$1,000,000.00. TGR also carries an umbrella insurance policy of an additional minimum of \$2,000,000.00. Employees of TGR are fully covered by Workers Compensation Insurance. TGR automobiles are fully covered by Automobile Insurance. Certificates of Insurance are available upon request. Client assess that these insurance amounts are adequate.

Limitation of Liability. The Client acknowledges and understands the potential risks associated with the project, and agrees to limit the liability of TGR to what the Client agrees is commercially reasonable. The Client therefore agrees to limit TGR's liability to the Client and to all contractors and subcontractors on the project, due to any claim of any nature whatsoever arising out of or relating to the performance of any services under this agreement, to damages or injuries resulting solely from TGR's negligence. The Client further agrees that TGR's total aggregate liability shall be limited to the insurance proceeds paid on behalf of or to TGR by TGR's insurers.

Notwithstanding, TGR's insurance and the limitation of liability client agrees to waive its subrogation rights to the extent any loss is covered by its property or liability insurance.

Warranty. The following warranties are applicable only if client accepts TGR's stewardship services as specified in this proposal. For planting projects, all soil amenities, initial watering, select pruning, labor and materials are included in the price proposed. All material shall be as specified in the contract and TGR agrees to use top quality live plant, seed and erosion control materials. All work is to be completed in a workmanlike manner according to standard practices.

PLANT PERFORMANCE CRITERIA: Our intent is that 75% of installed plants (plug, shrub or tree) shall be alive within one year of the date of our installation. We will replace plants one time at no charge if they die due to improper planting or inferior stock. We will not replace plants that are damaged or killed by insects, mechanical equipment, neglect, under-watering, over-watering, weather, natural disasters, disease, animals, the proliferation of invasive weeds or the impact of work by unrelated contractors. Such damage is specifically excluded from any warranty offered by us. Our warranty is conditioned upon Client's timely payment of all invoices, normal plant care by the client, and contracted and performed stewardship/maintenance activities for consecutive growing seasons following the installation of plant material. We do not guarantee plants planted in pots or planter boxes. Ornamental flowers, turf grass seeds, and bulbs are not guaranteed.

SEED PERFORMANCE CRITERIA: When establishing native plants from seed, TGR will reseed once without charge areas devoid of new germination within the first year of initial installation.

By the end of the first full growing season the cover crop shall be well established and there shall be no less than 90% vegetative cover and there shall be no noticeable areas devoid of vegetation. By the end of the second full growing season the cover crop shall not exceed 50% of the total vegetative cover. 25% of the planted native species shall be visible and actively growing. By the end of the third full growing season the cover crop shall not be a dominant species throughout the seeded area and 50% of the planted native species shall be visible and actively growing.

TGR's warranty is conditioned upon Client's timely payment of all invoices, normal plant care by the client, and contracted and performed stewardship/maintenance activities for consecutive growing seasons following the installation of plant material.

DISCLAIMER OF ALL OTHER WARRANTIES: THIS AGREEMENT IS NOT SUBJECT TO THE UNIFORM COMMERCIAL CODE. HOWEVER, TO THE EXTENT IT IS DETERMINED TO BE SUBJECT TO THE UNIFORM COMMERCIAL CODE, THEN WITH THE EXCEPTION OF THE FOREGOING LIMITED WARRANTIES TGR MAKES NO OTHER WARRANTIES, EXPRESS OF IMPLIED. IN NO EVENT WILL TGR BE RESPONSIBLE FOR CONSEQUENTIAL OR INCIDENTAL DAMAGES OF ANY NATURE WHATSOEVER.

Services not included. Other than initial watering at the time of installation, TGR is not responsible for watering and maintaining unless otherwise stated in writing. Any work specified as time and material will be charged as an extra to this agreement and will increase the total contract price.

Proprietary Information. Technical reports, letters, maps, tables, native seed lists, proposals, and other written or graphic products produced by TGR and the information contained therein remain the property of TGR and are not to be reproduced without the expressed prior written consent of TGR management.

Termination. TGR may terminate this agreement on three (3) days prior written notice if the Client (i) fails to timely pay invoice(s) as billed, (ii) (or agents of the Client) interfere with or do not allow TGR to perform the agreed upon scope of services, (iii) or otherwise breaches a term of this agreement. In the event of termination by TGR, the Client will become liable to pay TGR for all of the services and expenses incurred by TGR prior to the date of withdrawal, including legal fees and incurred damages of TGR.

Lien Notice. If the Client is the owner of real property that may be enhanced by the work to be performed pursuant to this agreement, then TGR hereby notifies the Client as follows: As required by Illinois, Indiana, and Wisconsin lien laws, TGR hereby notifies owner/Client that persons or companies furnishing labor or materials for improvement on the owner/Client's land may have lien rights if not paid.

Interpretation and Enforcement. This agreement sets forth the entire agreement. There have been no additional oral or written representations. This agreement shall not be modified except by written agreement signed by both the Client and TGR. This agreement shall be binding upon the Client and TGR, their heirs, successors, and assignees. Other than the representations made in the agreement client has not relied on any representations, oral or written, made by TGR. The state courts of Cook County, Illinois and Rock County, Wisconsin shall be the venues for the resolution of any dispute arising under this agreement.



October 2025  
YTD Summary of Trust  
Contributions and Expenditures

DATE	ACTIVITY	DESCRIPTION	AMOUNT
01/02/2025	Check Received	PERSONAL CHECK	\$30.00
02/20/2025	Check Received	BUSINESS CHECK	\$450.00
03/19/2025	Check Received	BUSINESS CHECK	\$100.00
06/03/2025	Check Received	BUSINESS CHECK	\$200.00
08/25/2025	Check Received	BUSINESS CHECK	\$1,000.00
09/10/2025	Check Received	PERSONAL CHECK	\$100.00
09/10/2025	Check Received	PERSONAL CHECK	\$150.00
10/7/2025	Transfer	Transfer from xxxx-2474 Transitional IRA to xxxx-5929	\$70,000.00
10/08/2025	Transfer	Transfer from xxxx-2474 Transitional IRA to xxxx-5940	\$30,126.64
<b>Total =</b>			<b>\$102,156.64</b>

CITY OF FORT ATKINSON  
C/O DWIGHT FOSTER PUB LIBRARY  
209 MERCHANTS AVE  
FORT ATKINSON WI 53538-2201

## Portfolio Summary

### Total Portfolio Value

**\$991,761.37**

1 Month Ago	\$963,262.93
1 Year Ago	\$893,816.80
3 Years Ago	\$700,480.45
5 Years Ago	\$748,369.40

### Solutions for your needs

Have you considered Edward Jones for your saving, spending and borrowing needs? With an Edward Jones account, you have access to features that can help you keep your saving, spending and borrowing in line with your long-term financial goals. Ask your financial advisor for details.

### Are you prepared for the unexpected?

While you're working hard to achieve your long-term financial goals, you may encounter some bumps along the way. One solution is to put strategies in place to help you protect the most important things in your life. Your financial advisor understands what's important to you and can partner with you throughout your life to help you and your family prepare for the unexpected.

### Overview of Accounts

Accounts	Account Holder	Account Number	Value 1 Year Ago	Current Value
Corporate Account Select	City of Fort Atkinson	536-25929-1-6	\$285,482.59	\$295,858.23
Corporate Account Advisory Solutions Fund Model	City of Fort Atkinson	536-25940-1-1	\$608,334.21	\$681,226.64
Individual Retirement Account Select Transitional	Dorothy Arlene Otting	536-62474-1-8	\$0.00	\$14,676.50
<b>Total Accounts</b>			<b>\$893,816.80</b>	<b>\$991,761.37</b>

Although account information is provided on this page, it does not guarantee an actual statement was produced. Refer to your account statement for the exact registration and more specific details regarding each account.

**Overview of Other Products and Services**

<b>Loans and Credit</b>	<b>Account Number</b>	<b>Balance</b>	<b>Approved Credit</b>	<b>Available Credit</b>	<b>Interest Rate</b>
Amount of money you can borrow for City of Fort Atkinson	536-25929-1-6	\$0.00	\$147,992*	\$147,992	8.00%

\* Your approved credit is not a commitment to loan funds. It is based on the value of your investment account which could change daily. The amount you may be eligible to borrow may differ from your approved credit. Borrowing against securities has its risks and is not appropriate for everyone. If the value of your collateral declines, you may be required to deposit cash or additional securities, or the securities in your account may be sold to meet the margin call. A minimum account value is required if you have loan features on your account. Your interest will begin to accrue from the date of the loan and be charged to the account. Your interest rate will vary depending on the assets under care of your Edward Jones Pricing Group. For more information on how your interest rate is calculated, contact your financial advisor or please visit: [www.edwardjones.com/disclosures/marginloans](http://www.edwardjones.com/disclosures/marginloans)

Important disclosures; such as Statement of Financial Condition, Conditions that Govern Your Account, Account Safety, Errors, Complaints, Withholding, Free Credit Balance, Fair Market Value or Terminology; relating to your account(s) are available on the last page of this package or at [www.edwardjones.com/statementdisclosures](http://www.edwardjones.com/statementdisclosures).

City of Fort Atkinson

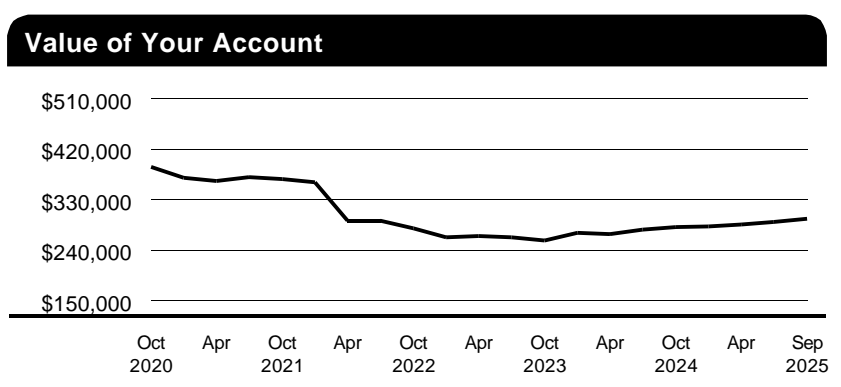
**Investing is about more than money**

At Edward Jones, we take the time to find out what's most important to you by digging deeper and helping you identify your priorities. With a real understanding of your goals, we can work with you to develop the financial strategies to help achieve them. For an in-depth conversation about what really matters to you, contact your financial advisor today.

**Corporate - Select**

Portfolio Objective - Account: Income Focus

Account Value	
<b>\$295,858.23</b>	
1 Month Ago	\$294,199.39
1 Year Ago	\$285,482.59
3 Years Ago	\$280,912.23
5 Years Ago	\$389,261.42



Value Summary		
	This Period	This Year
Beginning Value	\$294,199.39	\$280,785.03
Assets Added to Account	0.00	0.00
Assets Withdrawn from Account	0.00	0.00
Fees and Charges	0.00	0.00
Change In Value	1,658.84	15,073.20
<b>Ending Value</b>	<b>\$295,858.23</b>	

For more information regarding the Value Summary section, please visit [www.edwardjones.com/mystatementguide](http://www.edwardjones.com/mystatementguide).

Rate of Return					
Your Personal Rate of Return for Assets Held at Edward Jones	This Quarter	Year to Date	Last 12 Months	3 Years Annualized	5 Years Annualized
	1.67%	5.37%	3.79%	5.31%	0.48%

**Rate of Return (continued)**

**Your Personal Rate of Return:** Your Personal Rate of Return measures the investment performance of your account. It incorporates the timing of your additions and withdrawals and reflects commissions and fees paid. Reviewing Your Personal Rate of Return is important to help ensure you're on track to achieving your financial goals.

The performance of your investments is tracked since they have been held in the current account, but no earlier than Jan.1, 2009. This also includes investments you owned during this time period but have since sold. Certain events, including a transfer of an investment between accounts, share class conversion, or change in an investment's identification code (CUSIP) caused by a corporate action, will impact the time frame over which the investment's rate of return is calculated.

Rate of Return information on account statements uses the dollar-weighted calculation. Information used to calculate performance may have been obtained from third parties and Edward Jones cannot guarantee the accuracy of such information.

For the most current information, contact your financial advisor or visit [edwardjones.com/performance](http://edwardjones.com/performance).

**Asset Details (as of Sep 26, 2025)**

additional details at [www.edwardjones.com/access](http://www.edwardjones.com/access)

**Assets Held At Edward Jones**

Mutual Funds	Price	Quantity	Value	Rate of Return*
Blackrock Low Duration Bond A Symbol: BLDAX Asset Category: Income	\$9.17	18,441.245	\$169,106.22	1.72%
Blackrock Total Return CI A Symbol: MDHGX Asset Category: Income	10.02	12,649.901	126,752.01	1.79%
<b>Total Account Value</b>			<b>\$295,858.23</b>	

\*Your Rate of Return for each individual asset above is as of September 26, 2025. Returns greater than 12 months are annualized.

Your Rate of Return in the Asset Details section above measures the investment performance of each of your individual assets. It incorporates the timing of your additions and withdrawals and reflects commissions and fees paid. Reviewing your Rate of Return is important to help ensure you're on track to achieving your financial goals.

The performance of your investments is tracked since they have been held in the current account, but no earlier than Jan. 1, 2009. Certain events, including a transfer of an investment between accounts, share class conversion, or change in an investment's identification code (CUSIP) caused by a corporate action, will impact the time frame over which the investment's rate of return is calculated.

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For the most current information, contact your financial advisor or visit [www.edwardjones.com/performance](http://www.edwardjones.com/performance).

**Investment and Other Activity by Date**

Date	Description	Quantity	Amount
9/02	Dividend on Br Total Return A on 12,604.667 Shares at Daily Accrual Rate		\$450.53
9/02	Reinvestment into Br Total Return A @ 9.96	45.234	-450.53
9/02	Dividend on Blackrock Low Duration Bond A on 18,372.212 Shares at Daily Accrual Rate		633.72
9/02	Reinvestment into Blackrock Low Duration Bond A @ 9.18	69.033	-633.72

**Your Relationship and Mailing Group(s)**

**Relationship Group** - You've directed us to share information about these accounts with the individual(s) listed below. This means information about your financial accounts, goals and objectives may be shared with and accessible by each owner, authorized party, and any other individual in the Relationship Group, including through Edward Jones Online Access and Edward Jones reports.

Without any additional notification to you, the individual(s) below will also be able to share any information available to the Relationship Group with people outside your Relationship Group through Edward Jones Online Access, or by contacting the Edward Jones branch responsible for your accounts. You may revoke this direction at any time, but until such revocation, we'll share information as directed by any member of the Relationship Group.

**Individuals in this Relationship Group**

First Name	Last Name
Minetta	Lippert
City of Fort Atkinson	

**Mailing Group** - You have also asked us to combine certain information about the accounts listed below into the mailing group(s) below for delivery purposes. Information for accounts within the same mailing group may be included in one envelope and mailed to the mailing group address. We may still send certain information directly to the account owners, as we believe appropriate.

Account Number	Account Owner(s)	Account Type	Mailing Group Address
XXX-XX929-1-6	City of Fort Atkinson	Corporate Account Select	CITY OF FORT ATKINSON C/O DWIGHT FOSTER PUB LIBRARY 209 MERCHANTS AVE FORT ATKINSON WI 53538-2201
XXX-XX940-1-1	City of Fort Atkinson	Corporate Account Advisory Solutions Fund Model	
XXX-XX474-1-8	Dorothy Arlene Otting	Individual Retirement Account Select Transitional	

For more information on this relationship or mailing group(s), please visit [www.edwardjones.com/disclosures](http://www.edwardjones.com/disclosures). If you wish to make changes to either the relationship(s) or mailing group(s), please contact your financial advisor.

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City of Fort Atkinson

**It's open enrollment season**

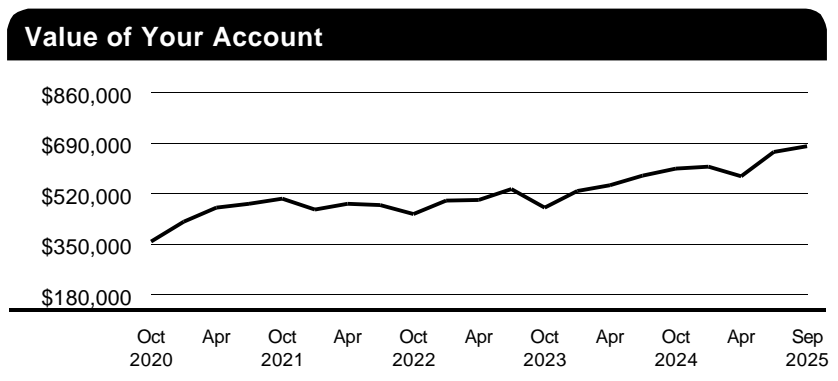
If your employer offers open enrollment for insurance benefits, consider meeting with your financial advisor before making any decisions on life or disability insurance. (Edward Jones is a licensed insurance producer in all states and Washington, D.C., through Edward D. Jones & Co. L.P. and in CA, NM and MA through Edward Jones Insurance Agency of CA, LLC; Edward Jones Insurance Agency of NM, LLC; and Edward Jones Insurance Agency of MA, LLC.)

**Corporate - Advisory Solutions Fund Model**

Portfolio Objective - Account: All Equity Focus

For more information about the Advisory Solutions program go to [www.edwardjones.com/advisorybrochures](http://www.edwardjones.com/advisorybrochures).

Account Value	
<b>\$681,226.64</b>	
1 Month Ago	\$669,063.54
1 Year Ago	\$608,334.21
3 Years Ago	\$419,568.22
5 Years Ago	\$359,107.98



Value Summary		
	This Period	This Year
Beginning Value	\$669,063.54	\$589,843.67
Assets Added to Account	250.00	2,030.00
Assets Withdrawn from Account	0.00	0.00
Fees and Charges	-608.22	-5,010.46
Change In Value	12,521.32	94,363.43
<b>Ending Value</b>	<b>\$681,226.64</b>	

For more information regarding the Value Summary section, please visit [www.edwardjones.com/mystatementguide](http://www.edwardjones.com/mystatementguide).

Rate of Return					
Your Personal Rate of Return for Assets Held at Edward Jones	This Quarter	Year to Date	Last 12 Months	3 Years Annualized	5 Years Annualized
	<b>5.76%</b>	<b>15.20%</b>	<b>14.05%</b>	<b>19.34%</b>	<b>12.29%</b>

**Performance Benchmarks**

**Rate of Return (continued)**

Large US Cap Equities (S & P 500)	7.39%	14.05%	17.16%	23.85%	16.75%
International Equities (MSCI EAFE)	3.67%	24.32%	14.00%	22.00%	11.80%
Taxable Fixed Income (Bloomberg Aggregate)	1.81%	5.90%	2.69%	4.95%	-0.50%

**Your Personal Rate of Return:** Your Personal Rate of Return measures the investment performance of your account. It incorporates the timing of your additions and withdrawals and reflects commissions and fees paid. Reviewing Your Personal Rate of Return is important to help ensure you're on track to achieving your financial goals.

**Performance Benchmarks:** Your Personal Rate of Return should be compared to the return necessary to achieve your financial goals. However, we understand many investors would like to compare their Personal Rate of Return to market indexes. Keep in mind this may not be an accurate comparison, as your Personal Rate of Return incorporates the timing of your specific additions and withdrawals and your specific investment mix, while published returns of market indexes do not.

These market indexes are used as a general measure of market performance for several major asset classes. Market indexes assume reinvestment of all distributions and do not take into account brokerage fees, taxes or investment management fees.

The performance of your investments is tracked since they have been held in the current account, but no earlier than Jan.1, 2009. This also includes investments you owned during this time period but have since sold. Certain events, including a transfer of an investment between accounts, share class conversion, or change in an investment's identification code (CUSIP) caused by a corporate action, will impact the time frame over which the investment's rate of return is calculated.

Rate of Return information on account statements uses the dollar-weighted calculation. Information used to calculate performance may have been obtained from third parties and Edward Jones cannot guarantee the accuracy of such information.

For the most current information, contact your financial advisor or visit [edwardjones.com/performance](http://edwardjones.com/performance).

**Rate of Return Indexes Definitions**

**S&P 500 Index:** A broad-based measurement of changes in stock market conditions based on the average performance of 500 widely held common stocks. While many of the stocks are among the largest, this index also includes many relatively small companies. It is a float adjusted capitalization-weighted index (stock price times number of publicly available shares outstanding), calculated on a total return basis with dividends reinvested.

**MSCI EAFE Index:** A market weighted index maintained by Morgan Stanley Capital International composed of foreign stocks from developed markets (excluding the U.S. and Canada).

**Bloomberg Aggregate Bond Index:** Measures the performance of government, mortgage-backed, asset-backed and corporate securities with at least one year to maturity.

**Asset Details (as of Sep 26, 2025)**

additional details at [www.edwardjones.com/access](http://www.edwardjones.com/access)

**Assets Held At Edward Jones**

Exchange Traded & Closed End Funds	Price	Quantity	Value	Rate of Return*
iShares MSC EAFE	\$76.20	445	\$33,909.00	5.42%
Ish Core S&P SC	118.47	350	41,464.50	5.96%
Ish RS MD-C ETF	96.16	197	18,943.52	14.29%
Ish RS M Grw ETF	142.53	234	33,352.02	12.40%
Ish RS MD-Cp ETF	138.89	229	31,805.81	9.93%

**Asset Details (continued)**

Exchange Traded & Closed End Funds	Price	Quantity	Value	Rate of Return*
Ish S&P500 Grwth	119.75	173	20,716.75	15.31%
Ish MSCI Grw ETF	112.56	177	19,923.12	4.96%
Ish MSCI Vlu ETF	67.50	307	20,722.50	8.89%
Ish Cor MSCI ETF	86.53	1,255	108,595.15	18.18%
Spdr S&P 500 ETF	77.85	1,672	130,165.20	26.84%
Vng Growth Index	476.43	46	21,915.78	35.49%
Vng Value Index	186.57	220	41,045.40	10.32%
Vng Large Cap	306.76	301	92,334.76	15.63%
Vng S&P 500	610.16	99	60,405.84	20.31%
Mutual Funds	Price	Quantity	Value	Rate of Return*
JPM U.S. Govt Money Market Im	1.00	5,927.29	5,927.29	—
<b>Total Account Value</b>			<b>\$681,226.64</b>	

\*Your Rate of Return for each individual asset above is as of September 26, 2025. Returns greater than 12 months are annualized.

Your Rate of Return in the Asset Details section above measures the investment performance of each of your individual assets. It incorporates the timing of your additions and withdrawals and reflects commissions and fees paid. Reviewing your Rate of Return is important to help ensure you're on track to achieving your financial goals.

The performance of your investments is tracked since they have been held in the current account, but no earlier than Jan. 1, 2009. Certain events, including a transfer of an investment between accounts, share class conversion, or change in an investment's identification code (CUSIP) caused by a corporate action, will impact the time frame over which the investment's rate of return is calculated.

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**Summary of Realized Gain/Loss**

	This Year
Short Term (assets held 1 year or less)	-\$261.43
Long Term (held over 1 year)	43,598.06
<b>Total</b>	<b>\$43,336.63</b>

Summary totals may not include proceeds from uncosted securities or certain corporate actions.

**Investment and Other Activity by Date**

<b>Date</b>	<b>Description</b>	<b>Quantity</b>	<b>Amount</b>
9/02	Dividend on JPM U.S. Govt Mny Mkt Capital on 5,866.56 Shares at Daily Accrual Rate		\$18.47
9/02	Reinvestment into JPM U.S. Govt Mny Mkt Capital @ 1.00	18.47	-18.47
9/08	Redeemed JPM U.S. Govt Mny Mkt Capital @ 1.00	-608.22	608.22
9/08	Program & Platform Fees		-608.22
9/10	Check Received Personal Ck#2008 Ronald & Patricia A Pelky		150.00
9/10	Check Received Personal Ck#2640 Reed Van Gorden & Sondra Pope		100.00
9/11	Buy JPM U.S. Govt Mny Mkt Capital @ 1.00	250	-250.00
9/19	Dividend on Ish Core S&P SC on 350 Shares @ 0.444168		155.46
9/19	Dividend on Ish S&P500 Grwth on 173 Shares @ 0.138377		23.94
9/19	Dividend on Ish RS MD-Cp ETF on 229 Shares @ 0.562984		128.92
9/19	Dividend on Ish RS MD-C ETF on 197 Shares @ 0.322439		63.52
9/19	Dividend on Ish RS M Grw ETF on 234 Shares @ 0.118937		27.83
9/24	Share Class Conversion from JPM U.S. Govt Mny Mkt Capital	-5,526.81	
9/24	Share Class Conversion to JPM U.S. Govt Money Market Im	5,526.81	
9/26	Buy JPM U.S. Govt Money Market Im @ 1.00	400.48	-400.48

**Money Market Detail by Date**

<b>Beginning Balance on Aug 30</b>					<b>\$0.77</b>
<b>Date</b>	<b>Transaction</b>	<b>Description</b>	<b>Deposits</b>	<b>Withdrawals</b>	<b>Balance</b>
9/19	Deposit		399.67		\$400.44
9/22	Income	Dividend on Money Market for 33 Days @ 3.64%	0.04		\$400.48
9/26	Withdrawal			-400.48	\$0.00
<b>Total</b>			<b>\$399.71</b>	<b>-\$400.48</b>	
<b>Ending Balance on Sep 26</b>					<b>\$0.00</b>

**Your Relationship and Mailing Group(s)**

Relationship Group - You've directed us to share information about these accounts with the individual(s) listed below. This means information about your financial accounts, goals and objectives may be shared with and accessible by each owner, authorized party, and any other individual in the Relationship Group, including through Edward Jones Online Access and Edward Jones reports.

Without any additional notification to you, the individual(s) below will also be able to share any information available to the Relationship Group with people outside your Relationship Group through Edward Jones Online Access, or by contacting the Edward Jones branch responsible for your accounts. You may revoke this direction at any time, but until such revocation, we'll share information as directed by any member of the Relationship Group.

**Individuals in this Relationship Group**

First Name	Last Name
Minetta	Lippert
City of Fort Atkinson	

Mailing Group - You have also asked us to combine certain information about the accounts listed below into the mailing group(s) below for delivery purposes. Information for accounts within the same mailing group may be included in one envelope and mailed to the mailing group address. We may still send certain information directly to the account owners, as we believe appropriate.

Account Number	Account Owner(s)	Account Type	Mailing Group Address
XXX-XX929-1-6	City of Fort Atkinson	Corporate Account Select	CITY OF FORT ATKINSON C/O DWIGHT FOSTER PUB LIBRARY 209 MERCHANTS AVE FORT ATKINSON WI 53538-2201
XXX-XX940-1-1	City of Fort Atkinson	Corporate Account Advisory Solutions Fund Model	
XXX-XX474-1-8	Dorothy Arlene Otting	Individual Retirement Account Select Transitional	

For more information on this relationship or mailing group(s), please visit [www.edwardjones.com/disclosures](http://www.edwardjones.com/disclosures). If you wish to make changes to either the relationship(s) or mailing group(s), please contact your financial advisor.

For more information about the Advisory Solutions program, see the applicable program brochure at [www.edwardjones.com/advisorybrochures](http://www.edwardjones.com/advisorybrochures).

## About Edward Jones

Edward D. Jones & Co., L.P., is dually registered with the Securities and Exchange Commission (SEC) as a broker-dealer and an investment adviser. Edward Jones is also a member of Financial Industry Regulatory Authority (FINRA).

**Statement of Financial Condition** — Edward Jones' Statement of Financial Condition is available at [edwardjones.com/about/financial-reports.html](http://edwardjones.com/about/financial-reports.html), your local office or by mail upon written request.

## About Your Account

**Notice of Account Agreement and Terms and Conditions for Electronic Funds Transfer (EFT) Updates:** We have updated account agreements to explain notification will occur when material changes are made to them, and that English is the controlling language of our business relationship with you, consistent with our existing English language disclosure. We have updated the Terms and Conditions for EFT so Edward Jones may distribute residual funds via an electronic funds transfer you established for the account. Please visit [edwardjones.com/disclosures](http://edwardjones.com/disclosures) and [edwardjones.com/disclosures/account-features-service-terms/online-services](http://edwardjones.com/disclosures/account-features-service-terms/online-services) to view the updated account agreements, English language disclosure, and the EFT terms and conditions.

**Account Information** – Your account agreement(s) contain the conditions that govern your account. Contact your financial advisor if you have any changes to your financial situation, contact information or investment objectives.

**Account Accuracy** – If you believe there are errors on your account, promptly notify your financial advisor or Client Relations. To further protect your rights, including rights under the Securities Investor Protection Act (SIPA), re-confirm any oral communication by sending us a letter within 30 days. If you think there is an error with, or you have a question about, your electronic transfers, contact Client Relations.

**Complaints about Your Account** – If you have a complaint, call Client Relations, send a letter to Edward Jones, Attn: Complaints Investigations, 12555 Manchester Rd., St. Louis, MO 63131 or send an email to [complaints@edwardjones.com](mailto:complaints@edwardjones.com)

**Pricing** – For the most current prices of your investments, contact your financial advisor or visit Online Access. While we believe our pricing information is reliable, some information is provided by third parties and we cannot guarantee its accuracy.

**Systematic and Money Market Transactions** – Additional transaction details may be available upon written request to Edward Jones, Attn: Trade Operations Dept.

**Fair Market Value for Individual Retirement Accounts** – Your account's fair market value as of Dec. 31 will be reported to the Internal Revenue Service (IRS) as required by law.

**Withholding on Distributions or Withdrawals** – Federal law requires Edward Jones to withhold income tax on distribution(s) from your retirement accounts and other plans, unless you elect not to have withholding apply by completing the appropriate form and returning it to the address specified on the form. Your election will remain in effect until you change or revoke it by completing and returning a new form. If you elect not to have withholding or do not have enough income tax withheld from your distributions, or if payments of estimated taxes are not sufficient, you may be responsible for payments of estimated taxes and/or incur penalties as a result. State withholding, if applicable, is subject to the state's withholding requirements.

**Fees and Charges** – The "Fees and Charges" amount shown in your Value Summary includes the following:








- Account fees (e.g., advisory program asset-based fees and retirement account fees);
- Fees and charges for services (e.g., check reorders and wire transfers); and
- Margin loan interest

This amount does not include transaction-based fees and charges on the purchase or sale of a security or other product (e.g., systematic investing fees, commissions, sales charges, and markups/markdowns). These fees and charges are shown in the activity section(s) of your statement or on your trade confirmations. For more information, contact your financial advisor.

**Rights to Your Money Market Fund, Bank Deposit and Free Credit Balances** – The uninvested cash in your account ("Free Credit Balance") is payable on demand. You may instruct us to liquidate your Insured Bank Deposit or Money Market fund balance(s). We will disburse the proceeds to you or place them in your accounts. Your instructions must be made during normal business hours and are subject to the terms and conditions of the account agreement(s).

To learn more about fees and costs, revenue sharing, and the compensation received by Edward Jones and your financial advisor, please talk with your financial advisor or visit [edwardjones.com/disclosures](http://edwardjones.com/disclosures).

## CONTACT INFORMATION

Client Relations		Online Access	Other Contacts
 Toll Free Phone 800-441-2357	For hours, visit <a href="http://edwardjones.com">edwardjones.com</a>	 <a href="http://edwardjones.com/access">edwardjones.com/access</a>	 Edward Jones Personal MasterCard® 866-874-6711
 201 Progress Parkway Maryland Heights, MO 63043		 Edward Jones Online Support 800-441-5203	 Edward Jones Business MasterCard® 866-874-6712
			 Edward Jones VISA® Debit Card 888-289-6635

Edward Jones Trust Co As Cust  
FBO Dorothy Arlene Otting IRA  
C/O City of Fort Atkinson

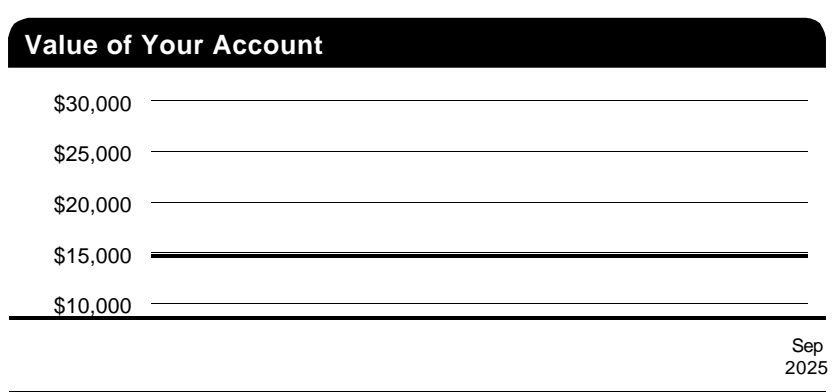
**Keeping your performance in perspective**

While market returns are important, you'll want to check your portfolio's performance against the return you need to reach your long-term goals. Your return expectations should be relevant to your goals, realistic based on your situation and reviewed over time. Your financial advisor can help you review your progress and determine whether any changes need to be made.

**Traditional Individual Retirement Account - Select Transitional**  
**Custodian: Edward Jones Trust Company**

Portfolio Objective - Account: Preservation of Principal

Account Value	
<b>\$14,676.50</b>	
1 Month Ago	\$0.00
1 Year Ago	\$0.00
3 Years Ago	\$0.00
5 Years Ago	\$0.00



Value Summary		
	This Period	This Year
Beginning Value	\$0.00	\$0.00
Assets Added to Account	14,676.50	14,676.50
Assets Withdrawn from Account	0.00	0.00
Fees and Charges	0.00	0.00
Change In Value	0.00	0.00
<b>Ending Value</b>	<b>\$14,676.50</b>	

For more information regarding the Value Summary section, please visit [www.edwardjones.com/mystatementguide](http://www.edwardjones.com/mystatementguide).

**Asset Details (as of Sep 26, 2025)**

additional details at [www.edwardjones.com/access](http://www.edwardjones.com/access)

**Assets Held At Edward Jones**

				<b>Balance</b>
Cash				<b>\$58.94</b>
<b>Exchange Traded &amp; Closed End Funds</b>	<b>Price</b>	<b>Quantity</b>	<b>Value</b>	<b>Rate of Return*</b>
Ish Core S&P 500	664.89	4	<b>2,659.56</b>	—
Ish RS MD-C ETF	96.16	10	<b>961.60</b>	—
Vng Rsl Grw 1000	119.56	10	<b>1,195.60</b>	—
<b>Mutual Funds</b>	<b>Price</b>	<b>Quantity</b>	<b>Value</b>	<b>Rate of Return*</b>
Dfa INTL Small Company I	24.79	53.151	<b>1,317.61</b>	—
MFS International Equity R6	39.78	87.536	<b>3,482.18</b>	—
PIMCO INTL Bond (USD-Hedged) I	9.91	199.521	<b>1,977.25</b>	—
TRP High Yield I	6.02	502.286	<b>3,023.76</b>	—
<b>Total Account Value</b>			<b>\$14,676.50</b>	

\*Your Rate of Return for each individual asset above is not available.

Your Rate of Return in the Asset Details section above measures the investment performance of each of your individual assets. It incorporates the timing of your additions and withdrawals and reflects commissions and fees paid. Reviewing your Rate of Return is important to help ensure you're on track to achieving your financial goals.

The performance of your investments is tracked since they have been held in the current account, but no earlier than Jan. 1, 2009. Certain events, including a transfer of an investment between accounts, share class conversion, or change in an investment's identification code (CUSIP) caused by a corporate action, will impact the time frame over which the investment's rate of return is calculated.

Information used to calculate performance may have been obtained from third parties and Edward Jones cannot guarantee the accuracy of such information.

For the most current information, contact your financial advisor or visit [www.edwardjones.com/performance](http://www.edwardjones.com/performance).

**Retirement Summary**

	<b>This Period</b>	<b>Cumulative</b>
2025 Contributions	\$0.00	\$0.00
2024 Contributions	0.00	0.00
Transfers Received	14,676.50	14,676.50

**Investment and Other Activity by Date**

<b>Date</b>	<b>Description</b>	<b>Quantity</b>	<b>Amount</b>
9/26	Transfer from 5369990915		\$58.94
9/26	Transfer Dfa INTL Small Company I Account- 536-99909-1-5	53.151	
9/26	Transfer Ish Core S&P 500 from Requested A/C 53699909-15	4	
9/26	Transfer Ish RS MD-C ETF from Requested A/C 53699909-15	10	
9/26	Transfer MFS International Equity R6 Account- 536-99909-1-5	87.536	
9/26	Transfer TRP High Yield I Account- 536-99909-1-5	502.286	
9/26	Transfer PIMCO INTL Bond (USD-Hedged) I Account- 536-99909-1-5	199.521	
9/26	Transfer Vng Rsl Grw 1000 from Requested A/C 53699909-15	10	

**Custodian: Edward Jones Trust Company**

This Edward Jones brokerage statement also serves as the Edward Jones Trust Company custodial account statement. No other account statement will be provided by Edward Jones Trust company for the period of time reflected on this statement.

**Your Relationship and Mailing Group(s)**

**Relationship Group** - You've directed us to share information about these accounts with the individual(s) listed below. This means information about your financial accounts, goals and objectives may be shared with and accessible by each owner, authorized party, and any other individual in the Relationship Group, including through Edward Jones Online Access and Edward Jones reports.

Without any additional notification to you, the individual(s) below will also be able to share any information available to the Relationship Group with people outside your Relationship Group through Edward Jones Online Access, or by contacting the Edward Jones branch responsible for your accounts. You may revoke this direction at any time, but until such revocation, we'll share information as directed by any member of the Relationship Group.

**Individuals in this Relationship Group**

<b>First Name</b>	<b>Last Name</b>
Minetta	Lippert
City of Fort Atkinson	

**Mailing Group** - You have also asked us to combine certain information about the accounts listed below into the mailing group(s) below for delivery purposes. Information for accounts within the same mailing group may be included in one envelope and mailed to the mailing group address. We may still send certain information directly to the account owners, as we believe appropriate.

<b>Account Number</b>	<b>Account Owner(s)</b>	<b>Account Type</b>	<b>Mailing Group Address</b>
XXX-XX929-1-6	City of Fort Atkinson	Corporate Account Select	CITY OF FORT ATKINSON C/O DWIGHT FOSTER PUB LIBRARY 209 MERCHANTS AVE FORT ATKINSON WI 53538-2201
XXX-XX940-1-1	City of Fort Atkinson	Corporate Account Advisory Solutions Fund Model	

**Your Relationship and Mailing Group(s) (continued)**

Account Number	Account Owner(s)	Account Type	Mailing Group Address
XXX-XX474-1-8	Dorothy Arlene Otting	Individual Retirement Account Select Transitional	

For more information on this relationship or mailing group(s), please visit [www.edwardjones.com/disclosures](http://www.edwardjones.com/disclosures). If you wish to make changes to either the relationship(s) or mailing group(s), please contact your financial advisor.

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**Account Information** – Your account agreement(s) contain the conditions that govern your account. Contact your financial advisor if you have any changes to your financial situation, contact information or investment objectives.

**Account Accuracy** – If you believe there are errors on your account, promptly notify your financial advisor or Client Relations. To further protect your rights, including rights under the Securities Investor Protection Act (SIPA), re-confirm any oral communication by sending us a letter within 30 days. If you think there is an error with, or you have a question about, your electronic transfers, contact Client Relations.

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**Withholding on Distributions or Withdrawals** – Federal law requires Edward Jones to withhold income tax on distribution(s) from your retirement accounts and other plans, unless you elect not to have withholding apply by completing the appropriate form and returning it to the address specified on the form. Your election will remain in effect until you change or revoke it by completing and returning a new form. If you elect not to have withholding or do not have enough income tax withheld from your distributions, or if payments of estimated taxes are not sufficient, you may be responsible for payments of estimated taxes and/or incur penalties as a result. State withholding, if applicable, is subject to the state's withholding requirements.

**Fees and Charges** – The "Fees and Charges" amount shown in your Value Summary includes the following:








- Account fees (e.g., advisory program asset-based fees and retirement account fees);
- Fees and charges for services (e.g., check reorders and wire transfers); and
- Margin loan interest

This amount does not include transaction-based fees and charges on the purchase or sale of a security or other product (e.g., systematic investing fees, commissions, sales charges, and markups/markdowns). These fees and charges are shown in the activity section(s) of your statement or on your trade confirmations. For more information, contact your financial advisor.

**Rights to Your Money Market Fund, Bank Deposit and Free Credit Balances** – The uninvested cash in your account ("Free Credit Balance") is payable on demand. You may instruct us to liquidate your Insured Bank Deposit or Money Market fund balance(s). We will disburse the proceeds to you or place them in your accounts. Your instructions must be made during normal business hours and are subject to the terms and conditions of the account agreement(s).

To learn more about fees and costs, revenue sharing, and the compensation received by Edward Jones and your financial advisor, please talk with your financial advisor or visit [edwardjones.com/disclosures](http://edwardjones.com/disclosures).

## CONTACT INFORMATION







Client Relations		Online Access	Other Contacts
 Toll Free Phone 800-441-2357	For hours, visit <a href="http://edwardjones.com">edwardjones.com</a>	 <a href="http://edwardjones.com/access">edwardjones.com/access</a>	 Edward Jones Personal MasterCard® 866-874-6711
 201 Progress Parkway Maryland Heights, MO 63043		 Edward Jones Online Support 800-441-5203	 Edward Jones Business MasterCard® 866-874-6712
			 Edward Jones VISA® Debit Card 888-289-6635

## Value of Edward Jones Accounts on October 9, 2025 at 5:20 p.m.

### Edward Jones Investment Accounts

[Go to Accounts](#)

**Total Current Value** **\$1,084,786.54**

	 <b>Trad IRA-1</b> ****2474	Select Transitional	\$0.00
	 <b>Corporation-1</b> ****5929	Select	\$366,241.12
	 <b>Corporation-2</b> ****5940	Advisory	\$718,545.42

 Account Order


### Values Over Time


 Expand

#### All Accounts

**Return/Annualized:** \$110,144.68/12.49%

Time Frame  
 1 Year

Start Date\*  
 10/10/2024 

End Date\*  
 10/9/2025 

Format as mm/dd/yyyy



Chart values represent Edward Jones accounts only. They do not include information about assets held by third-party vendors. Past performance does not guarantee future results.

Amounts added or withdrawn could include cash flows, asset additions, asset withdrawals, and margin loan activity involving asset movement within the account. Contact your Edward Jones team for more details.

# Library Standards

# 12

The development of the publication *Wisconsin Public Library Standards* was guided by the belief that Wisconsin's public libraries play a critical role in providing free access to knowledge, information, and diversity of ideas to all residents of the state. All Wisconsin residents need and deserve at least a basic level of library service. The standards provide a way to measure a basic level of quality for public library service and also provide a pathway to excellence in library service.

Thanks to tremendous advances in information technology and to the cooperation of all types of libraries in Wisconsin, even the smallest library can offer access to an almost unimaginable quantity of both electronic and traditional information resources. But while this new environment presents great opportunities, it also presents great challenges. Today's library staff must master not only the skills and knowledge necessary to provide traditional library services, but also the new and constantly changing skills and knowledge required to utilize the latest in information technologies. Challenges also face the trustees and other government officials responsible for securing the funding and other resources necessary to provide library service that meets current needs and expectations.

*Wisconsin Public Library Standards* attempts to cover the services, resources, and other requirements for basic library service that should be available to *all* residents of the state, including those who face physical or other barriers to their use of public libraries. Wisconsin's public library standards are entirely voluntary, but every library in Wisconsin is encouraged to meet the standards covered by the checklists in the *Standards* publication. Counties can establish minimum operating standards for libraries within the county under Wisconsin Statutes Section 43.11(3)(d). Libraries that fail to meet county standards may be denied exemption from the county library tax. For more information on county library standards, see <http://dpi.wi.gov/pld/legislation-funding/county-library>.

## How to Use the Standards

The simplest way to use the *Standards* is to provide a photocopy of the checklists in the *Standards* document to each library board member and review those checklists at your board meetings. If one chapter is covered per board meeting, it will take five meetings to review the *Standards* checklists completely. If your library does not meet certain standards, you can work with your library director to develop a plan to work toward achieving those standards in the future.

Libraries that already meet the minimums represented by the standards can develop service goals based on local needs.

Quantitative standards are provided for a number of library service parameters, such as hours open, staffing levels, collection size, and collection expenditures. Quantitative standards are established at four levels of effort: basic, moderate, enhanced, and excellent. Your library can establish service targets by selecting the appropriate level of effort to apply to each standard or can use the levels to plan for progressive improvements over a period of time.

### In This Trustee Essential

- How your library might benefit from use of library standards
- Different ways to use library standards
- How standards relate to library planning

A handy tool developed by Rick Krumwiede, former Director of the Outagamie Waupaca Library System, automatically calculates service targets for your library. All you need to input is your library name, municipal population, and library service population. You can download this tool from: [owlsnet.org/141/standards](http://owlsnet.org/141/standards).

## Library Planning and the *Standards*

It is most effective to use the *Standards* as a tool to assist with a locally developed planning process. In the context of a local planning process, your planning committee can use the checklists to gather information about the library and the community during the information-gathering phase of the planning process. The *Standards* can also help the planning committee establish objectives for the plan. [Chapter 2](#) of the *Standards* discusses in more detail how to use the *Standards* as part of a planning process. See also *Trustee Essential #11: Planning for the Library's Future* for more information about the planning process.

## Discussion Questions

1. Why should our library be concerned about state standards when those standards are voluntary?
2. Do new technologies reduce the need for your library to provide traditional library services? Why or why not?

## Additional Sources of Information

- Your library system staff (See *Trustee Tool B: Library System Map and Contact Information*.)
- [Wisconsin Public Library Standards](#)
- Outagamie Waupaca Library System (OWLS) Public Library Standards webpage ([owlsnet.org/141/standards](http://owlsnet.org/141/standards))
- [Wisconsin public library service data](#)
- IMLS national public library data ([www.imls.gov/research/public-libraries-in-the-united-states-survey.aspx](http://www.imls.gov/research/public-libraries-in-the-united-states-survey.aspx))

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

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