

CLINTONVILLE PUBLIC LIBRARY

LIBRARY BOARD MEETING
AT CLINTONVILLE PUBLIC LIBRARY
75 Hemlock St., Clintonville, WI 54929
4:00 PM
THURSDAY SEPTEMBER 11, 2025

September 5, 2025

Brandon Braden
Jeanne Witt
Penny Leder
Mike Hankins

Troy Kuhn
Jeanine Supanich
Polly Goodell

Agenda

1. Call to Order; Roll Call
2. Approval of Agenda
3. Citizens Forum
4. Friends of the Library Report
5. Approval of Minutes from August 14, 2025
6. Approval of August Financial and Special Accounts Reports
7. Approval of September 2025 bills
8. Discussion of Librarian's Report
9. Discussion/Possible Action on 2026 Calendar of Days Closed
10. Discussion/Possible Action on Proposed 2026 Budget
11. Discussion/Possible Action on Community Foundation for the Fox Valley Region
12. Set Next Meeting Day and Time
13. Adjourn

JS/jh

Posted: Clintonville City Hall, Clintonville Public Library, Community Center

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www.clintonvillelibrary.org
e-mail: cpl@clintonvillelibrary.org

CLINTONVILLE PUBLIC LIBRARY

AGENDA INFORMATION

September 5

Discussion/Possible Action on 2026 Calendar of Days Closed (Page 18)

Info: In your packet is the calendar of closings for 2026. Independence Day is on a Saturday, so we will be closed Friday and Saturday. The other one to point out is closing Saturday, December 26 since it is 4 hours and close to Christmas I felt it made sense to be closed.

Action: I'm looking for approval of the calendar.

Discussion/Possible Action on Proposed 2026 Budget (Pages 19-20)

Info: In your packet is an updated budget with preliminary numbers. These numbers may change between the packet being sent out and our meeting. If so, I will update the packet and send out refreshed sheets.

Action: No action needed. This is for information at the moment. The budget will be reviewed by Caz next week and more concrete numbers for insurance will come next month when we finalize and approve the budget.

Discussion/Possible Action on Community Foundation for the Fox Valley Region (Pages 21-22)

Info: In your packet is the latest portfolio performance from the Community Foundation for the Fox Valley Region. I'll be meeting with the Treasurer of the Waupaca Library Foundation to talk about their organization's relationship with the Community Foundation of the Fox Valley Region. There may be more information forthcoming between now and our meeting.

Action: Unknown at this time. More information provided will help with whether there is action to be taken.

Library Board
Library Meeting Room
2025-8-14

<https://clintonvillelibrary.org/library-board/>

Attendance

Brandon Braden - Council Rep - ABSENT
Jeanne Witt - Vice President
Penny Leder
Mike Hankins - ABSENT
Troy Kuhn - Secretary - School District Rep
Jeanine Supanich - President
Polly Goodell

Call to order 4:00 JS

Approval of Agenda - JW and PL - **APPROVED**

Investments Presentation - Michelle Lippart Hardwich, Community Foundation for the Fox Valley Region

Discussion of various types of investments - considerations of who has control of the money, endowment funds, and money earned. Also discussion and questions on limitations for using the CAF and what the library board can and cannot do with the money if CAF was chosen.

Citizen Forum Report - No one present

Friends of Library Report - Haven't met - discussions of Sept. Celebrations in the works

Approval of Minutes - July 10 - TK and PL - **APPROVED**

Financial and Special Accounts Reports - July 2025

Discussion regarding budgeting for Propane

Motion - to approve as presented - JW and PL

Roll Call

Brandon Braden - A
Jeanne Witt - Y
Penny Leder - Y
Mike Hankins - A
Troy Kuhn - Y
Jeanine Supanich - Y
Polly Goodell - Y

Bills - July 2025

Discussion of Interest Payment on Credit Card

Motion - PG and PL \$30,313.23

Roll Call

Brandon Braden - A

Jeanne Witt - Y

Penny Leder - Y

Mike Hankins - A

Troy Kuhn - Y

Jeanine Supanich -Y

Polly Goodell - Y

Librarian's Reports - Discussion

OWLS Member Agreement - Discussion/Action - APPROVED

Motion to approve the OWLS Member Agreement - PL and PG

2026 Budget - Discussion

Jamie discussed the budget with the committee - around 2% increase in property taxes resulting in potential 3% raise for salaries and 13% for healthcare.

Next Meeting Day - 2025-9-11 (4:00 pm)

Adjourn - JW and PL 5:06 pm

Submitted by Troy Kuhn, Secretary

**CLINTONVILLE PUBLIC LIBRARY
FINANCIAL STATEMENT
AUGUST 2025**

EXPENDITURES							to date 2025	August 2024
ACCOUNT	ACCT	DESCRIPTION	AUGUST	YTD	BUDGET	BALANCE	% SPENT	% SPENT
204-55110-41- 1100		SALARIES - STAFF	25,640.84	148,078.21	211,980.00	63,901.79	70%	68%
204-55110-41- 1110		JANITOR SALARIES	1,789.58	9,408.23	16,300.00	6,891.77	58%	53%
204-55110-41- 1500		EMPLOYEE BENEFITS	6,071.22	45,827.68	94,447.00	48,619.32	49%	49%
TOTAL SALARIES			33,501.64	203,314.12	322,727.00	119,412.88	63%	62%
204-55110-41- 2100		INFORMATION TECHNOLOGY	47.04	17,006.11	18,000.00	993.89	94%	110%
204-55110-41- 2250		TELEPHONE SERVICE	64.00	1,002.90	2,200.00	1,197.10	46%	65%
204-55110-41- 2260		GAS	23.80	3,206.95	4,700.00	1,493.05	68%	71%
204-55110-41- 2270		WATER AND ELECTRICITY	1,113.82	7,358.27	10,000.00	2,641.73	74%	70%
204-55110-41- 3110		POSTAGE	7.80	773.82	700.00	(73.82)	111%	87%
204-55110-41- 3112		COPIES	449.61	1,654.66	2,500.00	845.34	66%	73%
204-55110-41- 3122		STAFF DEVELOPMENT	0.00	45.00	1,000.00	955.00	5%	26%
204-55110-41- 3123		MAINTENANCE SUPPLIES	0.00	637.93	1,500.00	862.07	43%	56%
204-55110-41- 3150		OFFICE SUPPLIES	128.31	1,020.62	3,000.00	1,979.38	34%	71%
204-55110-41- 3260		SUBSCRIPTIONS & PERIODICAL	0.00	469.97	150.00	(319.97)	313%	309%
204-55110-41- 3261		MARKETING	0.00	0.00	0.00	0.00	0%	0%
204-55110-41- 3269		BOOKS - ADULT	506.62	8,452.57	12,693.00	4,240.43	67%	83%
204-55110-41- 3270		BOOKS - JUVENILE	534.97	9,338.83	12,692.00	3,353.17	74%	71%
204-55110-41- 3272		eCONTENT	589.25	6,397.73	7,800.00	1,402.27	82%	77%
204-55110-41- 3280		PROGRAMS	38.62	4,146.90	3,000.00	(1,146.90)	138%	148%
204-55110-41- 3285		FINE ARTS & AV - ADULT	167.32	2,065.13	3,500.00	1,434.87	59%	82%
204-55110-41- 3286		FINE ARTS & AV - JUVENILE	58.10	1,502.43	3,000.00	1,497.57	50%	59%
204-55110-41- 3310		TRAVEL & TRAINING EXPENSES	0.00	333.71	1,000.00	666.29	33%	59%
204-55110-41- 3490		OTHER OPERATING EXPENSES	76.83	2,174.68	1,000.00	(1,174.68)	217%	148%
204-55110-41- 3560		BUILDING REPAIR/MAINTENANC	629.55	3,628.69	4,000.00	371.31	91%	195%
204-55110-41- 5110		INSURANCE ON BUILDINGS	0.00	3,807.89	3,924.00	116.11	97%	96%
204-55110-41- 5130		INSURANCE-GEN. LIABILITY	0.00	1,255.45	1,662.00	406.55	76%	72%
SUBTOTAL			4,435.64	75,024.79	98,021.00	21,740.76	77%	87%
TOTAL OPERATING EXPENSES			37,937.28	278,338.91	420,748.00	142,409.09	66%	67%
CAPITAL FUND								
401-57610-41- 8102		COMPUTER & EQUIPMENT	0.00	0.00	0.00	0.00	0%	0%
401-57610-41- 8103		OFFICE FURNITURE & EQUIPME	0.00	0.00	0.00	0.00	0%	0%
401-57610-41- 8200		CAPITAL IMPROVEMENTS	0.00	0.00	0.00	0.00	0%	0%
SUBTOTAL			0.00	0.00	0.00	0.00	0%	0%
TOTAL EXPENDITURES			37,937.28	278,338.91	420,748.00	142,409.09	66%	67%
REVENUE							to date 2025	to date 2024
ACCOUNT	ACCT	DESCRIPTION	AUGUST	YTD	BUDGET	BALANCE	% REC'D	% REC'D
204-41110-41		GENERAL PROPERTY TAXES	0.00	0.00	239,233.00	(239,233.00)	0%	0%
204-43790-41		OWLS SUPPORT	0.00	168,708.00	168,065.00	643.00	100%	100%
204-46710-41		LIBRARY FEES	186.30	1,117.04	750.00	367.04	149%	141%
204-46711-41		COPY MACHINE REVENUE	401.90	2,752.40	4,000.00	(1,247.60)	69%	79%
204-48110-41		INTEREST ON INVESTMENTS	0.00	0.00	0.00	0.00	0%	0%
204-48900-41		MISCELLANEOUS REVENUE	40.00	4,208.12	8,700.00	(4,491.88)	48%	69%
204-49300-41		FUND BALANCE APPLIED	0.00	0.00	0.00	0.00	0%	0%
SUBTOTAL			628.20	176,785.56	420,748.00	(243,962.44)	42%	42%
TOTAL REVENUE			628.20	176,785.56	420,748.00	(243,962.44)	42%	42%

**CLINTONVILLE PUBLIC LIBRARY
SPECIAL ACCOUNTS REPORT
AS OF AUGUST 31, 2025**

204-41-ACCOUNT DESCRIPTION	AUGUST	CURRENT BALANCE	INTEREST YTD	12/31/2024 BALANCE
204 FUND CARRYOVER FROM PREVIOUS YEAR		92,355.07		92,355.07
EXCESS BUDGET REVENUE/FUND CARRYOVER SPENT		0.00		0.00
TOTAL 204 FUND BALANCE		92,355.07		92,355.07

805-41-ACCOUNT DESCRIPTION	AUGUST	CURRENT BALANCE	INTEREST YTD	12/31/2024 BALANCE
CDS				
6501084081 Gift & Memorial CD due 1/3/2026 Bank First 3.02%				
Miller	0.00	1,514.30	44.83	1,469.47
Gift & Memorial	0.00	14,237.66	418.10	13,819.56
Gift & Memorial CD Balance	0.00	15,751.96		15,289.03
6501084096 Mantin Savings CD due 1/3/2026 Bank First 3.02%	0.00	13,011.09	382.38	12,628.71
6501084066 Combined CD due 1/3/2026 at Bank First 3.02%				
Thompson	0.00	13,309.74	391.30	12,918.44
Schultz	0.00	34,976.41	1,027.88	33,948.53
Mantin	0.00	13,611.91	399.94	13,211.97
OES	0.00	13,496.42	396.62	13,099.80
Combined CD Balance	0.00	75,394.48		73,178.74

BILLINGS ESTATE DONATION				
6501084075 CD due 1/3/2026 Bank First 3.02%	0.00	232,742.43	6,839.98	225,902.45
6501084072 Billings CD due 1/3/2026 Bank First 3.02%	0.00	214,933.84	6,316.60	208,617.24
Total Billings Estate Donation	0.00	447,676.27		434,519.69

SAVINGS ACCOUNT (Mantin Funds) at Fox Communities				
120574 BALANCE - JANUARY 1		2,271.33		2,271.33
INTEREST RECEIVED	0.00	1.13	0.00	0.00
OTHER REVENUE	0.00	0.00	0.00	0.00
SUBTOTAL	0.00	2,272.46	0.00	0.00
EXPENDITURES	0.00	0.00	0.00	0.00
SAVINGS ACCOUNT BALANCE		2,272.46		2,271.33
BANK BALANCE SUBTOTAL		554,106.26		537,887.50

GIFT & MEMORIAL ACCOUNT				
BALANCE - JANUARY 1		22,583.02		33,390.46
805-48500-41 DONATIONS/CONTRIBUTIONS*	0.00	150.00		925.00
805- SUBTOTAL		22,733.02		34,315.46
55110-41-3492 EXPENDITURES**	0.00	904.29		11,732.44
SUBTOTAL		21,828.73		22,583.02
TOTAL 805 FUND BALANCE		575,934.99		560,470.52

GIFT & MEMORIAL ACCOUNT DETAIL		
805-48500-41 *DONATIONS/CONTRIBUTIONS	AUGUST	
	0.00	
TOTAL DONATIONS	0.00	

805-		
55110-41-3492 **EXPENDITURES		
	0.00	
TOTAL EXPENDITURES	0.00	

TOTAL 204 & 805 LIBRARY FUND BALANCE	668,290.06	652,825.59
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CLINTONVILLE PUBLIC LIBRARY
MONTHLY TRANSACTIONS
SEPTEMBER 2025

This is to certify that the expenditures listed in this document are duly authorized for payment at a regular meeting of the Board of Trustees held on September 11, 2025

RECEIPTS

204-41110-41	GENERAL PROPERTY TAXES	0.00
204-43790-41	OWLS SUPPORT	0.00
204-46710-42	LIBRARY FEES - August	181.31
204-46710-42	LIBRARY FEES - September to date	0.00
204-46711-42	COPY MACHINE REVENUE - August	308.06
204-46711-42	COPY MACHINE REVENUE - September to date	71.00
204-48900-41	MISCELLANEOUS REVENUE	
204-48900-41	TOTAL MISCELLANEOUS REVENUE	0.00
	204 ACCOUNTS SUBTOTAL	560.37
401-57610-41-	CAPITAL FUND	0.00
	TOTAL REVENUE	560.37

EXPENDITURES

204-55110-41-		
1100 SALARIES-STAFF		
Staff	August salaries	25,640.84 *
1100 SALARIES-STAFF	TOTAL	25,640.84
1110 SALARIES-MAINTENANCE		
Maintenance staff	August salaries	1,789.58 *
1110 SALARIES-MAINTENANCE	TOTAL	1,789.58
1500 EMPLOYEE BENEFITS		
Total staff	August benefits	6,071.22 *
1500 EMPLOYEE BENEFITS	TOTAL	6,071.22
2100 COMPUTER EXPENSES		
Integrated Solutions	Content on City website	40.98
Outagamie Waupaca Library System	Desktop computers	1,703.76
2100 COMPUTER EXPENSES	TOTAL	1,744.74
2250 TELEPHONE		
Spectrum	August bill	40.00 *
2250 TELEPHONE	TOTAL	40.00
2260 GAS		
2260 GAS	TOTAL	0.00
2270 WATER & ELECTRICITY		
Clintonville Utilities	August bill	744.02 *
2270 WATER & ELECTRICITY	TOTAL	744.02
3110 POSTAGE		
Baker & Taylor	Shipping	2.54
Baker & Taylor	shipping	3.58
Baker & Taylor	shipping	1.62
Baker & Taylor	shipping	3.58
Demco	Shipping	6.00
3110 POSTAGE	TOTAL	17.32
3112 COPIES		
James Imaging Systems	Copier Lease & Usage	194.16
3112 COPIES	TOTAL	194.16

3122 STAFF DEVELOPMENT

3122 STAFF DEVELOPMENT	TOTAL	0.00
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3123 MAINTENANCE SUPPLIES

Amazon	Brush Roller	73.68
Amazon	Vacuum Filters & Bags	45.28
Parks & Rec	Sanitizer, Gloves	53.52
Parks & Rec	Paper Towels	101.56
3123 MAINTENANCE SUPPLIES	TOTAL	274.04

3150 OFFICE SUPPLIES

Amazon	Contact Paper	71.56
Amazon	Replacement CD Cases	36.99
Amazon	Glue & Batteries	20.66
Amazon	Batteries	30.30
Demco	Labels, label protectors, book covers	191.30
ELM USA Inc.	Disc Cleaner machine usage	201.68
3150 OFFICE SUPPLIES	TOTAL	552.49

3260 SUBSCRIPTIONS & PERIODICALS

3260 SUBSCRIPTIONS & PERIODICALS	TOTAL	0.00
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3261 MARKETING

3261 MARKETING	TOTAL	0.00
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3269 BOOKS-ADULT

Amazon	adult books	15.97
Amazon	adult books	86.63
Amazon	adult books	32.15
Amazon	adult books	20.94
Amazon	adult books	81.51
Amazon	credit	-27.78
Baker & Taylor	adult books	254.19
Baker & Taylor	adult books	211.88
Baker & Taylor	adult books	137.90
Baker & Taylor	adult books	357.81
Gale Cengage	Large print books	53.23
Gale Cengage	Large print books	61.48
Gale Cengage	Large print books	30.71
Gale Cengage	Large print books	65.99
3269 BOOKS-ADULT	TOTAL	1,382.61

3270 BOOKS-JUVENILE

Amazon	children's books	27.91
Amazon	children's books	13.95
Amazon	credit	-12.99
Baker & Taylor	children's books	146.26
Baker & Taylor	children's books	23.88
3270 BOOKS-JUVENILE	TOTAL	199.01

3272 eCONTENT

Midwest Tape	Hoopla	617.45
3272 eCONTENT	TOTAL	617.45

3280 PROGRAMS

Amazon	Adult Program Supplies	4.05 MR
Amazon	Kids Program Supplies	26.97 MR
Amazon	Program Supplies	188.90 MR
Amazon	Summer Reading Program Prizes	39.87 MR
Amazon	Program Supplies	65.75 MR
Amazon	Tortoise Supplies	23.99 MR
Amazon	Program Supplies	227.85 MR
Amazon	Program Supplies	81.70 MR
Clintonville Area Chamber of Commerce	Chamber Bucks/Summer Prize	40.00 MR
Tadych's Marketplace Foods	Program Supplies	37.34 MR
Tadych's Marketplace Foods	Tortoise Food	2.49 MR
Tadych's Marketplace Foods	Tortoise Food	41.41 MR
3280 CHILDREN'S PROGRAMS	TOTAL	780.32

3285 A/V MATERIALS-ADULT

Amazon	movies	36.52
Amazon	movies	75.36
Amazon	movie	19.95
Amazon	movie	8.82
Amazon	movies	17.99
Amazon	movies	19.96
3285 A/V MATERIALS-ADULT	TOTAL	178.60

3286 A/V MATERIALS-JUVENILE

Amazon	movies	19.95
Amazon	movies	54.91
Amazon	movies	72.88
3286 A/V MATERIALS-JUVENILE	TOTAL	147.74

3310 TRAVEL & TRAINING EXPENSES

3310 TRAVEL & TRAINING EXPENSES	TOTAL	0.00
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3490 OTHER EXPENSES

Amazon	Coffee Supplies	37.88
Cardmember Service	Nametag	12.51
GFL Environmental	Garbage Service	37.64
Unique Management Services, Inc.	Accounts sent to collections	49.25
WI Dept. of Justice	Background Check	7.00
3490 OTHER EXPENSES	TOTAL	144.28

3560 BUILDING REPAIR/MAINTENANCE

Federal Security	Replaced Security Camera	425.00
Wisconsin Backflow Testing, LLC	Annual Backflow Inspection and Test Submittal Fee	150.00
3560 BUILDING REPAIR/MAINTENANCE	TOTAL	575.00

5110 INSURANCE ON BUILDINGS

5110 INSURANCE ON BUILDINGS	TOTAL	0.00
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5130 INSURANCE - GENERAL LIABILITY

5130 INSURANCE - GENERAL LIABILITY	TOTAL	0.00
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204-55110-41 ACCOUNTS TOTAL	41,093.42
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GIFT & MEMORIAL ACCOUNT (805-55110-41-3492)

GIFT & MEMORIAL ACCOUNT	TOTAL	0.00
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COMPUTERS & EQUIPMENT (401-57610-41-8102)

COMPUTERS & EQUIPMENT	TOTAL	0.00
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OFFICE FURNITURE & EQUIPMENT (401-57610-41-8103)

OFFICE FURNITURE & EQUIPMENT	TOTAL	0.00
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CAPITAL IMPROVEMENTS (401-57610-41-8200)

CAPITAL IMPROVEMENTS	TOTAL	0.00
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*prepaid	**additional bill				GRAND TOTAL	41,093.42
		***adjusted amount	MR=Miscellaneous Revenue			

CLINTONVILLE PUBLIC LIBRARY
MONTHLY REPORTS
SEPTEMBER 2025

JAMIE HEIN, LIBRARY DIRECTOR'S REPORT:

Budget Meeting

Caz Muske, City Administrator, and I met on Tuesday, August 12, to talk about the Library's 2026 budget. The Library is starting with a 2% increase to the general property tax levy which is an increase of \$4,784.

Clintonville Elementary School Open House

Hannah, Ashley, and I attended the Clintonville Elementary School Open House on Wednesday, August 20. This was the first time using the Library's iPad as a device to sign up people for library cards, and it worked quite well. We helped four people sign up for library cards and looked up others to make sure they were up to date. This is a great event and it's awesome to interact with families and share the great resources the Library has to offer.

OWLS Directors Meeting

I attended the annual in-person OWLS Directors Meeting on Thursday, August 21 at Mosquito Hill in New London. Our meeting started with an excellent presentation on "Why is the Library Director Paid Less than Everyone Else" by Kari Preuss of the Elroy Public Library. After that, we learned about some of the projects OWLS staff are working on, and had a round table discussion on library updates.

Monthly Statistics

I'm working on updating the monthly statistics sheet that is included in your packet each; mostly, to add more visual data elements instead of a spreadsheet filled with lots of numbers. I'm hoping this will make it easier to see and understand the data at a glance.

Trustee Tale

The latest issue of Trustee Tale is in your packet on pages 16 & 17 and it is all about the Wisconsin Public Library Consortium (WPLC).

YOUTH SERVICES AUGUST 2025 REPORT



Teddy Bear Workshop

This is a program I have been wanting to do for a long time, and I was so excited to be able to do it this year!

I ordered un-stuffed teddy bears from Noah's Ark Animal Workshop and their tie-dye kit so kiddos could stuff their own teddy bear and then dye it! The program was pricey, but fit our 'Color Our World' theme so well, I knew I wanted to utilize some of my budget for it this year. I had 20 bears, and each child got to stuff their bear, put a magic star inside, fill out their birth certificate, and then tie dye it however they want. Everyone had so much fun and I hope to be able to run this program again in the future!

Summer Reading Wrap-Up

Summer Reading wrapped up on August 15th and I took a programming break after that - in total, we had 4 storytimes this month, 2 crafts, the teddy bear workshop, watched Sonic 3, and had a Mario Kart tournament. We also picked winners for the raffle prizes, which all got picked up by the end of August. I got a lot of positive feedback from patrons about using reading logs to track reading for the whole summer, kids liked being able to see their progress and keep track of how much time they spent reading. I will definitely continue that for next year!



Enjoying ice cream after storytime

Program Numbers

Storytimes: 40 kids, 25 adults

Crafts: 13 kids, 7 adults

Teddy bear workshop: 30 total people

Mario kart: 25 people

Word find: 165 kids

Jar guess: 171 kids

Sonic 3 movie: 32 kids, 8 adults

Summer reading sign-up: 418 total people

368 signed up in 2024, we had a 13.6% increase in participation this year

ASHLEY BORMAN, TECHNICAL SERVICES LIBRARIAN'S REPORT:

I have continued to provide reference services through e-mail and in person for patrons who need assistance with obituaries and finding information in the Wisconsin Room.

I've been planning and prepping for Adult Crafting which resumes September 4th. We will be making Macrame Cacti. I have also been in contact with Denise from Waupaca County ADRC. She will be doing 2 programs for us this fall. September 11, we will be doing free memory screenings at the library. October 16th, we will have a Dementia Live! Program, where people can feel some of the physical effects people with cognitive impairments live with every day. I am also planning another puzzle swap, as well as a speed puzzle contest, and a winter social later this year.

I continue to have meetings with other OWLS members to discuss and review our options for library software systems. We are currently in the process of interviewing staff members from other libraries who use the softwares we are most interested in pursuing. We have demonstrations scheduled later this month for the softwares we are most interested in.

As always, I continue to purchase, catalog, and process materials.

UPCOMING WORKSHOPS, MEETINGS, & CLASSES:

- None to report.

GIFTS AND MEMORIALS:

The following individuals and organizations donated funds to the Library:

- None to report.

CLINTONVILLE PUBLIC LIBRARY													month	to date	month										14
2025 MONTHLY ACTIVITIES REPORT													2024	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Aug												
Days open	26	23	26	26	25	24	25	25	0	0	0	0	26	200	198	302	285	250	63	301	302	303	304	302	
DOOR COUNT																									
Door count	4,175	3,770	4,356	3,890	3,638	4,071	4,250	3,787	0	0	0	0	5,306	31,937	40,359	53,021	41,924	17,094	18,082	80,656	78,764	79,106	84,369	84,469	
Avg per day open	161	164	168	150	146	170	170	151					204	160	204	176	147	68	287	268	261	261	278	280	
CIRCULATION																									
Circs	3,688	3,137	3,927	3,117	3,179	4,099	4,229	3,600	0	0	0	0	3,698	28,976	30,586	42,867	39,508	26,127	22,410	61,388	68,751	73,866	79,700	78,394	
Renewals	740	794	885	865	870	833	1,149	987	0	0	0	0	701	7,123	6,702	8,252	8,268	6,623	7,526	19,020	20,472	20,325	20,331	19,543	
Subtotal Circulation	4,428	3,931	4,812	3,982	4,049	4,932	5,378	4,587	0	0	0	0	4,399	36,099	37,288	51,119	47,776	32,750	29,936	80,408	89,223	94,191	100,031	97,937	
Avg circ per day open	170	171	185	153	162	206	215	183					169	180	188	169	168	131	475	267	295	313	329	324	
Overdrive-Audiobook Uses	520	474	461	492	551	482	551	481	0	0	0	0	376	4,012	3,112	4,614	4,869	4,002	3,555	3,171	2,361	1,914	1,641	1,439	
Overdrive-Ebook Uses	320	296	327	285	329	308	301	317	0	0	0	0	297	2,483	2,519	3,747	4,182	3,742	4,355	3,124	2,861	3,136	3,100	2,893	
Overdrive-Magazine Uses	170	136	156	127	135	121	142	133	0	0	0	0	72	1,120	862	1,206	509	166	339	378	n/a	n/a	n/a	n/a	
Hoopla	245	265	260	270	271	237	243	250	0	0	0	0	208	2,041	1,681	2,138	1,582	1,313	1,660	1,432	1,124	697	n/a	n/a	
Total Circulation	5,683	5,102	6,016	5,156	5,335	6,080	6,615	5,768	0	0	0	0	5,352	45,755	45,462	62,824	58,918	41,973	40,244	88,513	95,569	99,938	104,864	102,269	
INTERLIBRARY LOAN																									
Total loaned	2,333	2,281	2,360	2,257	2,104	1,982	2,181	2,059	0	0	0	0	2,147	17,557	171,105	29,086	29,124	24,414	14,565	32,480	33,304	35,627	34,944	29,908	
Total borrowed	986	799	1,020	860	962	904	1,097	1,047	0	0	0	0	1,012	7,675	8,204	11,199	11,087	9,911	8,494	17,913	19,708	21,559	22,876	22,268	
Net	1,347	1,482	1,340	1,397	1,142	1,078	1,084	1,012					1,135	9,882	162,901	17,887	18,037	14,503	6,071	14,567	13,596	14,068	12,068	7,640	
REGISTERED BORROWERS		1st Q	%		2nd Q	%		3rd Q	%		4th Q	%													
Adult		2,241	70%		2,327	71%							2,487	2,585	2,487	2,911	2,916	2,988	2,941	3,577	3,807		3,973	4,326	
Juvenile		914	30%		941	29%							1,089	1,150	1,089	1,344	1,308	1,358	1,349	1,743	1,873		1,961	2,032	
Total borrowers		3,186			3,298								3,613	3,769	3,613	4,301	4,263	4,397	4,342	5,370	5,710		5,963	6,390	
Resident		1,737	55%		1,809	55%							2,055	2,039	2,055	2,400	2,299	2,441	2,395	2,851	2,968		3,080	3,218	
Nonresident		1,449	45%		1,489	45%							1,595	1,730	1,558	1,901	1,964	1,956	1,947	2,519	2,742		2,883	3,172	
PROGRAMMING																									
Adult programs in library	2	2	4	2	2	1	1	1	0	0	0	0	2	15	16	27	49	55	27	37	25	37	56	30	
Attendance	12	3	88	14	9	6	4	2	0	0	0	0	10	138	104	234	4,411	8,820	1,989	196	129	255	279	181	
Adult outreach programs	1	0	0	1	1	1	1	1	0	0	0	0	2	6	6	0	1	1	16	5	0	0	0	0	
Attendance	15	0	0	17	9	13	24	24	0	0	0	0	20	102	62	0	40	46	218	166	0	0	0	0	
Teen programs in library	3	3	2	2	2	1	1	1	0	0	0	0	1	15	18	22	4	0	30	89	38	12	19	14	
Attendance	36	69	54	40	43	6	13	25	0	0	0	0	7	286	297	331	67	0	1,303	529	282	61	107	86	
Juvenile programs in library	9	8	10	7	6	9	9	6	0	0	0	0	7	64	71	56	31	27	146	383	308	245	248	265	
Attendance	415	564	711	520	494	1,062	744	491	0	0	0	0	949	5,001	6,975	3,298	1,068	1,028	10,528	6,803	5,914	5,378	5,742	5,594	
Juvenile outreach programs	1	2	1	1	3	0	0	0	0	0	0	0	1	8	9	13	32	2	22	121	70	65	86	84	
Attendance	32	38	23	36	859	0	0	0	0	0	0	0	121	988	943	2,263	2,016	303	324	1,988	1,393	985	1,290	1,187	
Total programs	16	15	17	13	14	12	12	9	0	0	0	0	13	108	120	118	117	85	241	635	441	359	409	393	
Total attendance	510	674	876	627	1,414	1,087	785	542	0	0	0	0	1,107	6,515	8,381	6,126	7,602	10,197	14,362	9,682	7,718	6,679	7,418	7,048	
Meeting Rm (not lib pgrms)	23	15	14	19	16	11	11	16	0	0	0	0	25	125	192	190	185	0	127	277	175	154	154	76	
VOLUNTEERS																									
Number	2	2	7	2	3	9	2	2	0	0	0	0	1	29	21	26	20	16	28	45	55	25	1	15	
Hours worked	5.50	8.50	18.25	4.50	7.50	27.00	4.00	3.75	0.00	0.00	0.00	0.00	1.50	79	87	79	56	54	26	125	233.00	162.00	8.00	43.00	
COMPUTER STATS																									
Public Computer sessions	271	282	234	230	260	213	229	217	0	0	0	0	190	1,936	1,400	1,936	1,939	1,043	1,177	5,141	6,273	7,458	7,395	8,541	
Laptop Checkouts	1	0	0	1	1	0	0	0	0	0	0	0	0	3	10	10	9	0	2	29	98	87	114	117	
Wireless sessions	557	509	628	591	651	588	607	584	0	0	0	0	621	4,715	4,721	7,370	5,562	4,072	2,492	6,353	6,630	7,711	7,807	7,147	
Total website page views	1,268	1,842	1,677	1,704	1,190	1,331	1,304	1,238	0	0	0	0	1,096	11,554	9,145	16,291	17,267	22,123	11,382	30,272	35,689	38,599	37,431	30,904	
Facebook likes	1,488	1,501	1,520	1,529	1,538	1,560	1,578	1,594	0	0	0	0	1,466	1,594	1,466	1,370	1,214	1,067	1,020	959	833	736	650	578	

[illegible]

Trustee Tale

Trustee Tale is a joint project of the Manitowoc-Calumet Library System, Nicolet Federated Library System, Outagamie Waupaca Library System, Winnefox Library System and Wisconsin Valley Library System.

If you have questions, comments, or suggestions for future articles, contact your system director.

An Introduction to the Wisconsin Public Library Consortium (WPLC)

*By Becky Scherer,
Manitowoc-Calumet Library System*

The Wisconsin Public Library Consortium, or WPLC, was formed in 2001 as an organization that would allow public library systems to enter into statewide partnerships. The goal was, and continues to be, to support programs that are innovative and collaborative.

The main and most popular service of WPLC is Wisconsin's Digital Library, or as patrons think of it, Libby. Wisconsin's Digital Library provides e-content, such as e-books, audiobooks, and magazines, through the OverDrive platform and is available to patrons through the Libby app. The popularity of the statewide collection has steadily increased each year from its inception. In 2024, the digital library circulated over 9.5 million electronic materials to library users throughout the State of Wisconsin, one million more loans than in 2023. In 2025, public libraries and public library systems will contribute just over \$1,500,000 to add new e-content to the statewide digital library in an attempt to keep up with patron demand.



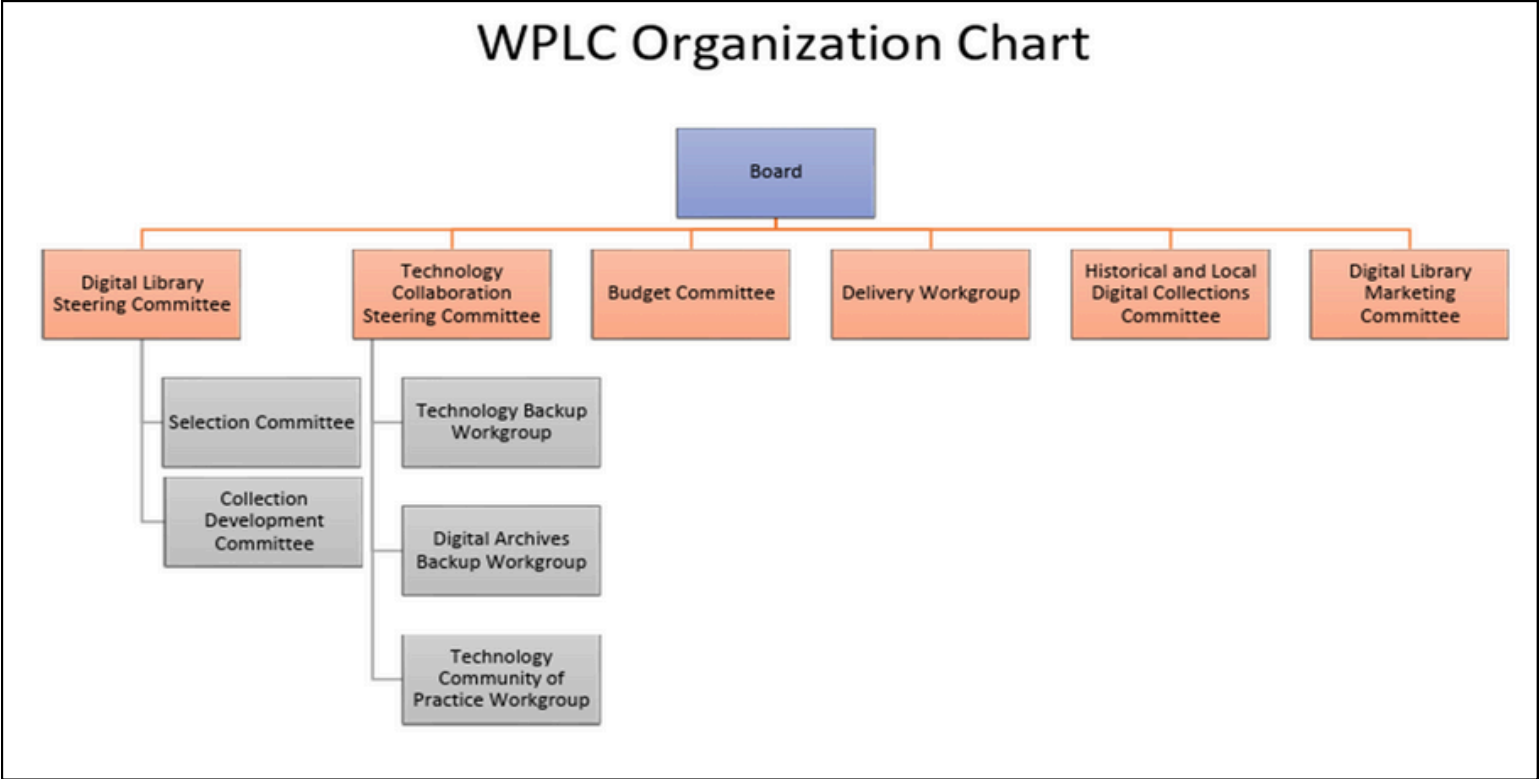
Additional WPLC projects include OverDrive support courses for librarians, statewide digitization support and backup, a technology community of practice, and collaboration on shared services such as statewide delivery. The chart below depicts the various committees and workgroups providing those resources and support as of the beginning of 2025.

Earlier this year, WPLC approved its first strategic plan. Stakeholders recognized that due to the continual growth and expansion of the organization, it was necessary to gather data to inform its future direction and determine WPLC's capacity to sustain current and future projects.

The keystone activity was to establish the following mission and vision statements to codify the purpose of WPLC.

Mission: The Wisconsin Public Library Consortium brings together expertise and resources to support collaborative work resulting in greater equity and affordability for Wisconsin public libraries and their communities.

Vision: To serve as the strategic center of experimentation, collaboration, and innovation for Wisconsin public libraries.



In response to the objectives of the plan, a Website Workgroup was created to redesign the website for the organization. Additionally, a Communications Committee was established to increase member library awareness of and engagement with the services of WPLC. An updated 2026 organization chart will reflect the addition of these groups.

By the end of 2025, the WPLC Board intends to approve organizational values, based on the new mission and vision statements, to guide the organization’s future direction, ensuring WPLC’s success as it moves forward.

Lastly, the work and accomplishments of WPLC are made possible not only by the participation of Wisconsin public library and library system communities, but also by the tireless efforts and commitment of the Project Managers of WiLS (Wisconsin Library Services) for which we are very grateful.

More information about WPLC: [Wisconsin Public Library Consortium](https://owlsweb.org/trustee-tale/)
Wisconsin’s Digital Library: [Wisconsin Public Library Consortium – OverDrive](https://owlsweb.org/trustee-tale/)
Track strategic plan activities: [WPLC Strategic Plan Activation & Assessment Worksheet](https://owlsweb.org/trustee-tale/)

Clintonville Public Library - 2026 Days Closed Calendar

January						
S	M	T	W	T	F	S
				H	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

April						
S	M	T	W	T	F	S
			1	2	H	C
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

July						
S	M	T	W	T	F	S
			1	2	H	C
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

October						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

February						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

May						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	C
24	H	26	27	28	29	30
31						

August						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

November						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	CE	H	H	C
29	30					

March						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

June						
S	M	T	W	T	F	S
	2	3	4	5	6	
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

September						
S	M	T	W	T	F	S
		1	2	3	4	C
6	H	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

December						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	H	H	C
27	28	29	30	H		

H = Holidays

January 1 - New Year's Day

April 3 - Good Friday

May 25 - Memorial Day

July 3 - Independence Day

September 7 - Labor Day

November 26 - Thanksgiving Day

November 27 - Day after Thanksgiving

December 24 - Christmas Eve Day

December 25 - Christmas Day

December 31 - New Year's Eve

C = Closed Days (in addition to Sundays)

April 4 - Easter Weekend

May 23 - Memorial Day Weekend

July 4 - 4th of July Weekend

September 5 - Labor Day Weekend

November 28 - Thanksgiving Weekend

December 26 - Christmas Weekend

CE = Close Early (Close at 5pm)

November 25 - Thanksgiving Eve

CLINTONVILLE PUBLIC LIBRARY
2026 Budget-Revenue

		PROPOSED					
LIBRARY REVENUE		2023	2024	2025	ACTUAL TO	2025	2026
ACCOUNT	DESCRIPTION	ACTUAL	ACTUAL	BUDGET	6/30/2025	ESTIMATE	BUDGET
204-41-41110	GENERAL PROPERTY TAXES	\$225,500	\$232,265	\$239,233	\$0	\$239,233	\$244,017
204-41-43790	OWLS SUPPORT**	\$156,462	\$164,798	\$168,065	\$99,852	\$168,708	\$184,209
204-41-46710	LIBRARY FINES	\$1,916	\$1,442	\$750	\$615	\$1,500	\$750
204-41-46711	COPY REVENUE	\$4,229	\$4,706	\$4,000	\$1,969	\$4,000	\$4,000
204-41-48110	INTEREST ON INVESTMENTS	\$0	\$0	\$0	\$0	\$0	\$0
204-41-48900	MISCELLANEOUS REVENUE	\$9,674	\$8,565	\$8,700	\$1,293	\$7,700	\$8,700
204-41-49300	FUND BALANCE APPLIED	\$28,824	\$0	\$0	\$0	\$0	\$0
TOTAL REVENUE		\$426,605	\$411,776	\$420,748	\$103,730	\$421,141	\$441,676

**OWLS Support is calculated on proposed figures for Waupaca and Outagamie County budgets.	
Intersystem = Nicolet Federated Library System and OWLS payment for service to residents of Shawano County.	
2023 OWLS Support=WAU 118,411 + OUT 18,646 + Intersystem 19,301 (OWLS: 971; NFLS: 18,330)	
2024 OWLS Support=WAU 112,180 + OUT 25,277 + Waushara 109 + Intersystem 26,711 (OWLS: 1,876; NFLS: 24,835)	
2025 OWLS Support=WAU 111,681 + OUT 26,032 + Waushara 12 + Intersystem 30,340 (OWLS: 2,483; NFLS: 27,857)	
2026 OWLS Support Proposed=WAU 125,646 + OUT 26,283 + Intersystem 32,253 (OWLS: 3,545; NFLS: 28,708) + *Other 27	

Projected Annual Costs for 2026	
OWLSnet fee:	\$16,224
WPLC Buying Pool Share:	\$1,708
Other IT fees:	

*Other includes Waushara & Winnebago Counties

Clintonville Public Library
2026 Budget-Expenditures

Account #	Description	2025 BUDGET	2025 TO DATE 4/30	2025 ESTIMATE	2026 PROPOSED BUDGET
204-41-55110-1100	Staff Salaries	211,980.00	71,156.00	225,078.00	229,292.00
204-41-55110-1110	Janitor Salaries	16,300.00	4,473.00	14,408.00	19,165.00
204-41-55110-1500	Benefits	94,447.00	23,787.00	68,328.00	86,947.00
Total Salaries		322,727.00	99,416.00	307,814.00	335,404.00

Account #	Description	2025 BUDGET	2025 TO DATE 4/30	2025 ESTIMATE	2026 PROPOSED BUDGET
204-41-55110-2100	Information Technology	18,000.00	16,778.00	19,500.00	19,000.00
204-41-55110-2250	Telephone	2,200.00	383.00	2,000.00	2,200.00
204-41-55110-2260	Gas	4,700.00	2,117.00	4,000.00	4,200.00
204-41-55110-2270	Water/Elec.	10,000.00	3,593.00	11,000.00	12,000.00
204-41-55110-3110	Postage	700.00	695.00	1,000.00	1,000.00
204-41-55110-3112	Copies	2,500.00	337.00	2,700.00	2,500.00
204-41-55110-3122	Staff Development	1,000.00	45.00	1,850.00	2,000.00
204-41-55110-3123	Maintenance Supplies	1,500.00	88.49	1,300.00	1,500.00
204-41-55110-3150	Office Supplies	3,000.00	595.00	3,000.00	3,000.00
204-41-55110-3260	Subscriptions/Periodicals	150.00	49.97	500.00	150.00
204-41-55110-3261	Publishing	0.00	0.00	200.00	0.00
204-41-55110-3269	Adult Books	12,693.00	3,727.00	13,500.00	13,483.00
204-41-55110-3270	Juvenile Books	12,692.00	6,035.00	13,500.00	13,484.00
204-41-55110-3272	eContent	7,800.00	3,829.00	10,000.00	9,000.00
204-41-55110-3280	Programming	3,000.00	1,372.00	6,500.00	3,000.00
204-41-55110-3285	A/V Materials-Adult	3,500.00	878.00	4,500.00	3,500.00
204-41-55110-3286	A/V Materials-Juvenile	3,000.00	159.00	4,000.00	3,000.00
204-41-55110-3310	Travel & Training Expenses	1,000.00	334.00	1,300.00	1,500.00
204-41-55110-3490	Other Expenses	1,000.00	1,376.00	2,700.00	1,200.00
204-41-55110-3560	Repair/Maintenance	4,000.00	1,994.00	5,000.00	5,000.00
204-41-55110-5110	Insurance - Buildings	3,924.00	3,790.00	3,826.00	3,755.00
204-41-55110-5130	Insurance - Gen. Liability	1,662.00	987.00	1,524.00	1,800.00
Subtotal		98,021.00	49,162.46	113,400.00	106,272.00
Total Operating Expenses		420,748.00	147,591.46	421,214.00	441,676.00

COMMUNITY FOUNDATION FOR THE FOX VALLEY REGION

PORTFOLIO UPDATE 2Q 2025

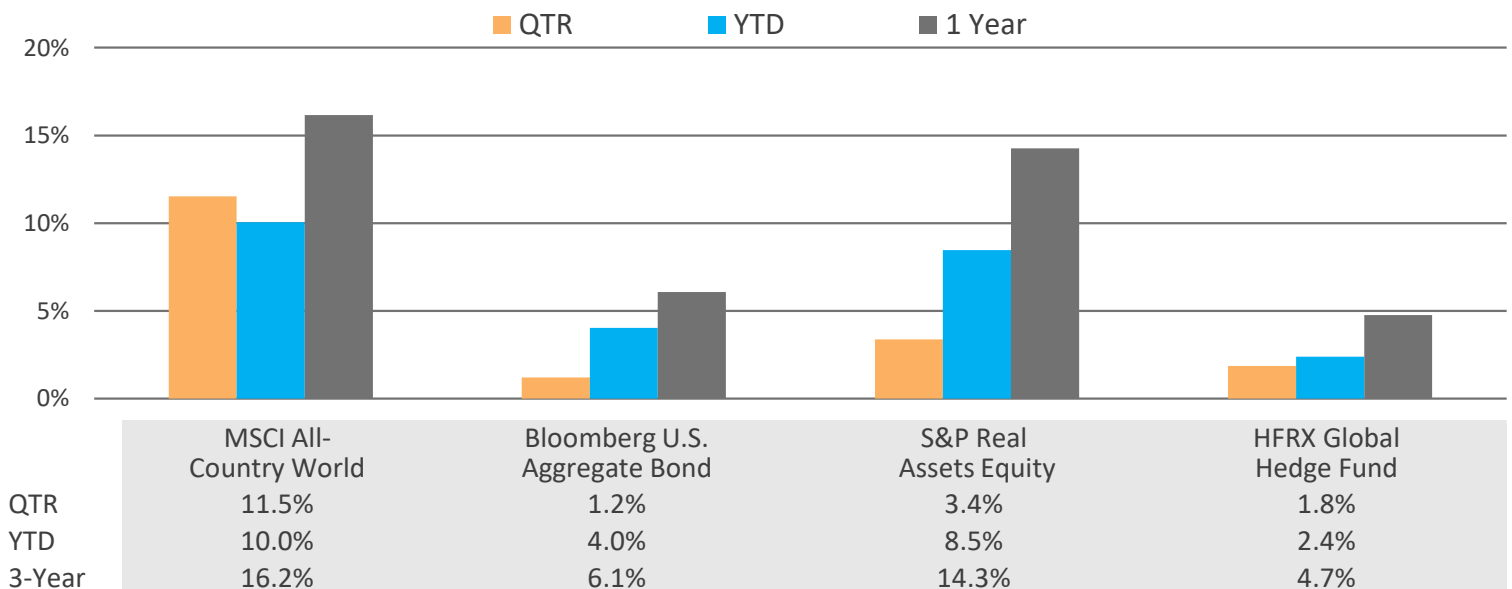
MARKET UPDATE

From the passage of the One Big Beautiful Bill and the loss of the United States' AAA credit rating, to persistent trade war tensions and bunker-busting bombs dropped on Iran, the second quarter of 2025 was nothing short of explosive. Yet, as is sometimes the case in investing, financial markets demonstrated their uncanny ability to climb a steep wall of worry—delivering healthy returns in the face of geopolitical and economic uncertainty.

Just three months ago, the S&P 500 Index teetered on the edge of a 20% drawdown. Credit spreads were widening towards historical averages, and investor sentiment was gripped by volatility and uncertainty. By quarter-end, however, those outsized market moves felt like ancient history. Equities not only recouped their losses but surged to new highs, credit spreads tightened to near cycle lows, and volatility subsided.

- After a near-bear market decline through April, U.S. large cap rebounded strongly. The S&P 500 Index fully recovered its early-2025 losses and advanced to a new high, despite an uncertain earnings and profit outlook. The weakening U.S. dollar helped bolster the relative performance of international stocks, which bested their domestic counterparts during the quarter.
- Bond returns were predominantly positive. Below-investment grade spread sectors saw outsized gains as risk premiums fell to near-cycle lows amid increasing demand for risk exposure.
- U.S. public real estate saw investor support in the second half of 2024 as expectations of interest rate cuts by the U.S. Federal Reserve. Outside of the quick drop and recovery following Liberation Day in early April, U.S. public real estate has since traded mostly flat through much of 2025, coinciding with the pause in interest rate cuts by the Fed.
- Hedge funds posted strong performance in the second quarter, with equity hedge and event-driven strategies leading the pack—each delivering gains north of 5%. The lone laggard was global macro, which struggled with early quarter volatility and choppy price movements.

MARKET INDEX PERFORMANCE



PORTFOLIO PERFORMANCE¹

	QTR	1-Year	3-Year	5-Year
Endowment²	8.2%	12.7%	12.3%	9.0%
<i>Target Benchmark³</i>	8.4%	13.3%	12.5%	9.8%
Long-Term Portfolio	8.5%	13.1%	12.2%	9.5%
<i>Target Benchmark⁴</i>	8.6%	13.3%	12.8%	9.9%
Intermediate-Term Portfolio	4.8%	9.6%	7.6%	5.1%
<i>Target Benchmark⁵</i>	4.9%	9.8%	7.9%	5.1%
Short-Term Portfolio	1.0%	4.5%	3.9%	1.7%
<i>ST Target Benchmark⁶</i>	1.0%	4.5%	3.9%	1.7%

- The Endowment returned 8.2% for the quarter vs. the benchmark return of 8.4%. The portfolio benefited from broad diversification and strong performance from active managers, particularly within equities. Importantly, we do not have private capital data yet for the quarter. We would expect returns to be higher once that's included. Within real assets, the portfolio's overweight to gold and gold mining contributed positively to returns, as this strategy generated 11.6% for the quarter.
- The Long-Term Portfolio and Intermediate-Term portfolios returned 8.5% and 4.8% respectively, in-line with their benchmarks. The strong absolute performance for the quarter was driven primarily from the rebound continuing from last quarter with international equities, as well as outperformance from real assets which was led by the portfolio's gold exposure.
- The Short-Term Portfolio posted positive gains on the month, with short-term yields remaining above 4%.

PORTFOLIO POSITIONING

	ENDOW <i>Target</i>	ENDOW <i>Current Allocation</i>	LT	IT	ST
GLOBAL EQUITY	67.5%	69.4%	70.0%	35.0%	0.0%
GLOBAL FIXED INCOME & CASH	20.0%	18.2%	20.0	55.0	100.0
REAL ASSETS	7.5%	7.0%	5.0	5.0	0.0
DIVERSIFYING STRATEGIES	5.0%	5.3%	5.0	5.0	0.0

- At the macro-asset category level, most portfolios are positioned conservatively and are close to the IPS targets, given several mixed market signals that make it difficult to identify any significant opportunistic positioning.
- There are a few tactical positions in the Endowment portfolio, including an overweight to gold and gold mining, which has done well in this more volatile environment. The Long-Term and Intermediate-Term Portfolios are slightly underweight liquid diversifying strategies and overweight fixed income and cash, which FEG perceives to have a broader opportunity set.
- Within equities, all portfolios are broadly aligned with the benchmark in regards to style, geography and size. The recent change to the MSCI ACWI IMI benchmark has reduced most of the previous overweight to small-cap equities.

ENDOWMENT PORTFOLIO PERFORMANCE v. PEERS⁷

	1Q 2025	1- Year	3-Year	5-Year
Endowment	1.3%	6.5%	5.2%	10.7%
<i>Peers \$250.0m to \$499.9m</i>	0.1	5.9	4.7	11.1
<i>Peers \$500m and Over</i>	-0.2	5.4	4.5	10.5
<i>Target Benchmark</i>	-0.2	6.1	4.6	10.8

Performance compared to peers is reported on a quarter lag.

Over the trailing one-year period, the Foundation's outperformance relative to both peer groups was likely driven by an overweight to public equities—the highest-returning asset class for the year—and strong manager alpha across public equities, fixed income, real assets, and diversifying strategies. The Foundation also benefits from a lower allocation to cash than peers, which helps during up markets.

¹ Portfolio performance is reported net of investment management fees. FEG advisory fees are currently 0.19% for the Endowment and 0.07% for the long-term and intermediate-term portfolios.

² Quarterly performance is reported ex-Private Capital due to limited availability of data.

³ The Endowment target benchmark is currently comprised of Target Benchmark is 67.5% MSCI ACWI IMI, 19.5% Bloomberg U.S. Aggregate Index, 7.5% S&P Real Assets Equity, 5.0% HFRX Global Hedge Fund Index, and 0.5% U.S. 91-Day Treasury Bills.

⁴ The long-term portfolio target benchmark is currently comprised of 70.0% MSCI ACWI IMI, 19.5% Bloomberg Aggregate Index, 5.0% S&P Real Assets Equity, 5.0% HFRX Global Hedge Fund Index, and 0.5% U.S. 91-Day Treasury Bills.

⁵ The intermediate-term target benchmark is comprised of 35.0% MSCI ACWI IMI, 50.0% Bloomberg Aggregate Index, 5.0% S&P Real Assets Equity, 5.0% HFRX Global Hedge Fund Index, and 5.0% U.S. 91-Day Treasury Bills.

⁶ The short-term portfolio target benchmark is comprised of 100% ICE BofAML U.S. 3-Month Treasury Bill Index.

⁷ Peer comparison based on FAOG-Crewcalc 1Q 2025 Final Community Foundation Results. Peers \$250m to \$499.9m sample size of 15 participants, and Peers \$500m and Over sample size of 23.