

FY 2027 Plan of Service and Operating Budget

Prepared by Library Director, Amanda McKay

DRAFT: Approved by the Board of Trustees:

Table of Contents

Executive Summary	2
Abstract	2
Tax Rate	2
Exclusions	2
Expenses vs. Standards	3
Mortgage and Reducing Debt.....	3
Assumptions	3
Operating Budget Funds	3
Corporate Fund	4
Grants	4
Accuracy	4
Special Reserve Fund and Capital Improvement Plan	4
FY 2027 Income Detail.....	4
FY 2027 Expense and Services Detail.....	5
Collection Development.....	5
FY 2027 Materials Budget.....	5
Collection Development Standards Compliance	6
Trained Cataloging Staff	6
FY 2027 Non-resident Card Rate	6
Marketing.....	6
Programs	7
Staffing	10
Compensations	10
Benefits	10
Volunteers.....	10
Staff Development.....	11
Technology	11
Tort/Liability	11

FY 2027 Working Budget	12
Delayed Payments, Cash Shortfalls, and Unaddressed Expenses	14
Illinois Public Library Standards: Standards Compliance	15
Core Standards.....	15
Access	15
Advocacy	15
Building and Grounds	15
Collection Management.....	15
Finance and Budget.....	16
Governance and Administration	16
Human Resources	16
Information Services	16
Marketing and Promotion.....	16
Programming	16
Safety	16
Technology	16
Appendix A—Working Budget Detail.....	16

Executive Summary

Abstract

The budget and plan of service for FY2027 represents a change in our overall approach to budgeting with the successful payment of the mortgage in November 2025. This payment, 10 years early, marks the ability to change our approach to one of planning and preparing for the future needs of both the library and the building. This is reflected in the addition of a capital improvement plan as well as putting resources towards supporting such a plan.

Tax Rate

Our projected tax rate for FY2027 is \$.2556. Our actual tax rate for FY2026 was \$.27487. We have continued to either hold or decrease our overall tax rate every year for the last 10 years.

Exclusions

The Special Reserve Fund is not used for the annual budget, but does play an important role in the capital improvement plan, so it will be reflected in a separate section of this plan.

Expenses vs. Standards

FY	Operating Budget *	Salaries (Total Compensation)	Salaries % of Budget	Materials	Materials % of Budget	% of Budget Remaining
2027	\$1,448,451	\$727,175.91	50.2%	\$136,100	9.4%	40.4%
2026	\$1,433,702	\$711,874.30	49.5%	\$132,500	9.2%	41.3%
2025	\$1,394,484	\$693,137.77	50%	\$130,300 [^]	9.4%	40.6%
2024	\$1,306,057	\$672,520.94	51.5%	\$120,300	9.2%	39.3%
2023	\$1,164,429	\$587,679.71	50.7%	\$111,700	9.6%	39.7%
2022	\$1,123,221	\$562,467.99	50.1%	\$106,500	9%	40.9%
2021	\$990,703	\$552,730.14	55.8%	\$98,800	10%	34.2%
2020	\$948,888	\$529,213.32	55.8%	\$117,800	12%	32.2%

*See exclusions above

The standard for salaries and benefits (including IMRF, Social Security, and health insurance) is “up to 70%” of the operating budget (found in *Illinois Public Library Standards*).

The standard for material expenditure is a minimum of 8-12% of the operating budget (found in *Illinois Public Library Standards*).

We continue to run much leaner than our peer organizations from a staffing perspective and have kept our personnel expenses at or near the 50% mark for several years. This has been achieved through automation of several procedures (including the automated materials handler) as well as looking for ways to outsource specialty services, such as marketing and technology.

Mortgage and Reducing Debt

In November 2025, the mortgage was successfully paid, 10 years before the maturity date.

Assumptions

Operating Budget Funds

The Operating Budget consists of income and expenses to the Corporate, Donations, Grants, Enterprise, Maintenance, Tort/Liability, Worker’s Compensation, Audit, IMRF, and Social Security/Medicare Funds.

Corporate Fund

Income for the Corporate Fund includes: corporate tax receipts, mobile home tax, housing authority tax, personal property replacement tax, eRate rebate, investment income and fund interest.

In our levy request for FY2027, we requested \$1,223,858 which represents an increase of \$34,491. However, while we have increased our total revenue request, the tax rate itself is projected to drop by almost \$.02 over last year and will be down \$.09 from 10 years ago.

Grants

The library applies annually for the Public Per Capita grant, offered through the Illinois State Library. The library also seeks out other grant opportunities as appropriate and fitting with our mission.

Accuracy

All amounts presented in this document have been compiled using the most accurate information available at the time of preparation.

The working budget is intended to serve as a guiding document for the day-to-day functioning of the library.

Special Reserve Fund and Capital Improvement Plan

While we have always had a special reserve fund and the statutory required plan of use for those funds, this is the first year that we are reporting on the activity within the fund as it is tied to our capital improvement plan.

We currently have \$479,297.34 in the Special Reserve Fund. We are predicting a transfer to reserves at the end of FY26 of \$40,000, taking into account that we keep about 5 months of operating expenses in our general account at all times. We anticipate a larger transfer at the end of FY27.

FY 2027 Income Detail

Taxes—Property	
Corporate	\$1,067,701
Building and Maintenance	\$90,000
Audit	\$4,000
Liability (Tort)	\$50,000
Workman's Comp	\$1,800
Unemployment	\$1,000
IMRF	\$1,000
Social Security/Medicare	\$1,000
Personal Property Replacement Tax	\$35,000
Investments	\$35,000

Taxes—Property	
eRate	\$4,000
Per Capita Grant	\$18,000
Other Grants	\$50,000
Donations and Memorials	\$40,000
Enterprise Fund (fines, fees, hourly meeting room rental)	\$49,950
TOTAL	\$1,448,451

Note: Some income lines have been combined. Exact detail is shown on the FY 2027 Working Budget Detail in Appendix A.

FY 2027 Expense and Services Detail

Collection Development

Building and maintaining our collection is a core element of our mission. Our materials selectors use a variety of metrics to evaluate the collection and our community’s needs. They pay special attention to not only the specific requests for materials that come in, but also the genre those requests come from and how we can grow the overall collection. They interview patrons about what they are reading and take feedback from patrons and staff about what patrons are looking for when they stop in. We also do an occasional survey to gather input from users and non-users. Finally, they also look at the overall consortium collection as well as library reviews and bookclub lists to better understand the larger trends.

The larger library community also experienced one of our oldest book sellers quickly shutting down in October 2025. Baker and Taylor had been in business for over 100 years and abruptly shut, leaving many libraries scrambling to fill book orders. Thankfully, we had already switched away from Baker and Tayler to Ingram in 2024 because of declining service from Baker and Tayler. However, with even less competition in the marketplace, we are anticipating increased costs. We will be watching to see what Amazon develops with their new Online Library Hub through Amazon Business (of which we are already a member).

FY 2027 Materials Budget

	FY27	FY26	FY 25	FY 24	FY 23	FY22
Books	\$49,000	\$46,000.00	\$43,000	\$39,000	\$34,000	\$26,000
Visual	\$18,000	\$18,000.00	\$15,000	\$18,000	\$18,000	\$18,000
Audio	\$0	\$0.00	\$0	\$1,500	\$900	\$500
Periodicals	\$3,600	\$3,500.00	\$3,000	\$3,000	\$3,000	\$4,000

	FY27	FY26	FY 25	FY 24	FY 23	FY22
Online Databases	\$30,500	\$30,500.00	\$30,300	\$28,300	\$28,300	\$20,500
Youth Books	\$33,000	\$32,500.00	\$31,000	\$27,000	\$24,000	\$24,000
Youth Visual	\$18,000	\$2,000.00	\$2,000	\$3,000	\$3,000	\$3,000
Youth Audio	\$0	\$0.00	\$0	\$500	\$500	\$500
Grant Purchases			\$6,000			
Total	\$136,100	\$132,500.00	\$130,300	\$120,300	\$111,700	\$96,500

Collection Development Standards Compliance

With the new Illinois Public Library Standards, the Effingham Public Library is placed in the highest category (Core, Intermediate, Advanced) in 9 of the 10 specific metrics. The final metric that we are still working on achieving is #10 “The library’s special collections are digitized to preserve and provide broad access to these resources.” Our genealogy group is working on a digitization project of all of their materials. There is not an active timeline for completion as they are a volunteer-based organization.

Trained Cataloging Staff

We currently have 2 staff that are trained as full catalogers and continue to maintain their credentials through the SHARE-system required training hours. We also have one staff member that has maintained his status as a barcoder, which means that he is able to attach our items to existing records, which helps to speed up our processing times.

FY 2027 Non-resident Card Rate

In May 2022, the board moved to the tax bill method for calculating the non-resident rate. This has been a wonderful change for our patrons as it has created a more equitable method for assessing the fee. If the library had continued with the old method of assessing the household fee, the rate for FY2027 would be \$221. We will provide a more detailed review of the non-resident card program in April 2025 as the board evaluates continuing this program.

Marketing

The Effingham Public Library uses a mix of online and in-house marketing materials supplemented with local PR and, when required for major events, paid-for advertising. It is becoming increasingly important that we make sure the whole community is aware of the services we provide.

The marketing plan has been updated for 2026 and is focused on increasing awareness of the library’s services and increasing both card redemption and circulation.

Staff have developed several strategies for the board to consider to meet these goals. We would continue our work with Imagine This! to support our efforts in social media. In house, we are focusing more on “organic” posts as well as adding video to improve our overall exposure on social media.

We will also continue with two targeted marketing campaigns through our library-specific marketing service, Orange Boy. We launched one targeted campaign during 2023 and saw a 25% return in customers. On the strength of those results, we feel that investing in two campaigns per year will help us achieve our goals.

We would also invest in a year-long advertising campaign with the local radio station to further extend our reach into the community. Finally, we will also add in billboards to extend our reach into the community

MARKETING	FY2027
Promotional Items	\$2,5000
Targeted Marketing	\$7,000
Outsourced Social Media Support	\$12,000
Radio Ads	\$3,700
Billboards	\$4,800
Total	\$30,000

Programs

Programs continue to be a key element of delivering on our mission. We have seen tremendous growth in our program attendance and have worked hard to diversify our offerings and be responsive to community needs.

Our adult programs in particular have seen a nice return on investment with an increase in our overall participation. We have offered a wide range of classes from fitness classes to book clubs and card classes to crafting. Many of our adult classes are re-occurring from month to month, but we also try to offer several one-off programs each month to hit various interest points.

Adult Programming	FY2027	FY2026	FY2025	FY2024	FY2023
Swag - Seniors with Attitude Group Prize	\$600	\$250.00	\$200.00	\$200.00	120.00
SWAG Paint Party			\$150.00		75.00
Coffee/ Cups/Plates etc.	\$100	\$100.00	\$100.00	\$100.00	100.00
General Programming	\$1,200	\$1,200.00	\$1,000.00	\$1,000.00	1,000.00
Large Budget Programs	\$600	\$600.00	\$600.00	\$600.00	500.00

Adult Programming	FY2027	FY2026	FY2025	FY2024	FY2023
Movie License		\$0	\$0	\$153.00	300.00
Summer Reading Program Prizes	\$350	\$350.00	\$350.00	\$350.00	340.00
Half of Beanstack cost		\$420.00	\$400.00	\$400.00	400.00
ILP Program Cost	\$400	\$400.00	\$400.00	\$400.00	400.00
Winter Read prizes and Rewards	\$225	\$225.00	\$225.00	\$350.00	340.00
History Programs with the Museum	\$300	\$300.00	\$300.00		
Chair Yoga	\$1,200	\$600.00	\$600.00		
Computer Classes	\$1,800	\$1,800.00	\$1,800.00		
Total	\$6,530	\$6,245.00	\$6,125.00	\$3,753.00	\$3,575.00

Youth programming continues to show very strong support. We've added a few new re-occurring programs to provide more variety and depth to our overall offerings. We've also started to look at how we handle our Summer Reading Program. With registrations consistently over 1,500, it has challenged us to think about how we provide this program and the types of prizes that we offer.

Youth Programming	FY2027	FY2026	FY2025	FY2024	FY2023
In House Programs: Story Times, Scavenger hunts, craft table, STEAM, Homeschool, and general youth programming	\$2,500	\$2,500.00	\$2,005.00	\$1,730.00	\$3,550.00
1,000 Books Before Kindergarten Back to School Event and Books	\$200	\$300.00	\$300.00	\$300.00	\$300.00
Eggstravaganza	\$200	\$200.00	\$100.00	\$100.00	\$ 150.00
Downtown Trick or Treat (Books)		0	\$0	\$300.00	\$300.00
Halloween @ Evergreen		0	\$0	\$100.00	\$150.00
Halloween Parade	\$400	\$400.00	\$400.00	\$300.00	\$ 275.00
ECC Trick or Treat		0	\$100.00	\$50.00	\$ 50.00

Youth Programming	FY2027	FY2026	FY2025	FY2024	FY2023
Hometown Christmas Story Time N Craft		0	\$0	\$100.00	\$100.00
Family Read Night	\$1,000	\$800.00	\$800.00	\$500.00	\$50.00
Movies with Make and Take		0	\$0	\$150.00	\$25.00
Special One Off Programs	\$200	\$200.00	\$200.00	\$200.00	\$100.00
Summer Read Evening Support (contracted)		0	\$2,000.00	\$2,000.00	\$2,000.00
Summer Read kickoff	\$600	\$600.00	\$600.00	\$600.00	\$600.00
Summer Read external program presenters	\$1,000	\$1,000.00	\$400.00	\$400.00	\$400.00
Summer Read inhouse programs	\$320	\$300.00	\$320.00	\$320.00	\$200.00
Summer Read Décor	\$100	\$100.00	\$100.00	\$100.00	\$100.00
Summer Read Books	\$1,500	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00
Summer Read Prizes and Rewards	\$1,000	\$750.00	\$500.00	\$500.00	\$750.00
Super Summer Readers Medals or lanyards (200)	\$150	\$150.00	\$150.00	\$150.00	\$250.00
Summer Read teen volunteer thank yous	\$150	\$150.00	\$150.00	\$150.00	\$150.00
Summer Read Pool Party	\$250	\$250.00	\$225.00	\$200.00	\$200.00
Summer Read and volunteer t-shirts	\$300	\$250.00	\$250.00	\$500.00	\$500.00
Beanstack	\$840	\$420.00	\$400.00	\$400.00	
TAB Sponsored Teen Events	\$500	\$500.00	\$300.00	\$300.00	
Community Events	\$1,500	\$1,700	\$1,200.00	\$1,200.00	
Miscellaneous supplies (paper, cardstock, glue, etc)	\$500	\$500.00	\$500.00	\$500.00	\$500.00
Book Bike Supplies	\$500	\$500.00	\$500.00		\$500.00
Outreach (Group visits to EPL and EPL visits to groups)	\$300				
Total	\$14,000	\$13,570.00	\$13,395.00	\$13,300.00	\$14,200.00

Staffing

Staffing is our single largest category of expense and our most valuable expenditure as far as delivering on our mission. We currently have 16 employees, 6 of whom are full-time. We have one vacant position, which is for a User Experience Coordinator.

Compensations

Through HR Source, we are able to evaluate our wages against other Illinois libraries of a similar size. We remain within range of our peers. In addition, we work hard to continue to offer solid raises for staff, including periodic wage adjustments when a staff member is consistently going above their job description. Our current total for salary and benefits is \$727,175.91.

Benefits

The Library's health insurance will be renewed with Blue Cross Blue Shield Illinois. Because of rising premiums, we've had to make some adjustments to how we are able to support the premiums. In the past, we've been able to cover 100% of the premium for all full time staff who wish to obtain health insurance through the library. Spouses and family members' premiums are paid 100% by the employee, if they wish to add them to our coverage.

This year, we have had to establish a base plan that we are able to cover 100% of the premium and then offer alternate plans with better deductibles/out-of-pocket maximums that the employee can opt into and cover the remaining balance of the monthly premium through payroll deduction. We anticipate that this will be the continued norm for health insurance premiums.

Dental and vision coverage is offered through a group plan with the City of Effingham and is paid 100% by the employee, if they wish to participate.

The Library is an IMRF employer; all employees meeting the IMRF hours threshold of 20 hours/week must participate in IMRF and 4.5% of their earnings will be withheld for IMRF contributions. Our IMRF rate for calendar year 2026 is 9.63%.

Volunteers

We are so pleased to be able to offer volunteer hours to the community. We have a variety of duties that are completed by volunteers, including light cleaning duties, craft prep, book wrapping for our Book Box program, and of course, our book sale volunteers. We also work with AARP and their volunteers in order to provide free tax prep for our community.

In 2025, the Effingham County Probation office brought back the community service hours, so we have once again been working with their organization to help folks meet their required community service portion of their release.

Staff Development

Continuing education for staff members and community involvement continues to be a priority of the library. We plan to send one staff member to the Illinois Library Association conference for 2026. We have budgeted \$2,000 for training and \$2,500 for travel expenses; we will work with each request as it comes through to ensure good use of these dollars.

Technology

The majority of our technology needs are met through the service contract with Lazerware. They provide a structured maintenance program for an annual cost of \$34,000. This include maintaining the integrity of our network, improving and updating speed and response times for software, as well as all maintenance, large and small. We no longer need to have a person on site to troubleshoot technology issues with staff equipment as they can be onsite within a few hours for major problems and within 24 for minor. In addition, they have remote access to our network to troubleshoot network outages (which are rare) within minutes.

In late 2025, we made the switch from Google to Microsoft. This switch was for two reasons. First, Microsoft was changing how businesses could purchase their Office suite and moved to a subscription-based model. Within that subscription was access to not only office tools, but other office basics, such as email and calendars. All of this would come with a substantially lower price tag/month than what we paid for Google. Though it was not a welcome shift, it was a necessary shift that saved the library several thousand dollars annually.

In early 2026, we needed to replace our server. It was 10 years old, purchased when we first moved to the new facility, so it was time for this piece of equipment to be replaced.

Tort/Liability

Tort funds can be expended as approved by state statute. In 2026, the Library switched liability insurance carriers and moved away from the City of Effingham plan. The reason for this was largely based on wanting a policy that was more specifically tailored to the needs of a library so that we could obtain coverages that better met our overall needs. The library remains grateful for the outstanding support and service we always received from the insurance carriers selected by the City.

Liability Insurance	\$15,000
Maintenance/Safety	\$20,580
Security System	\$500
RFID Security System	\$10,000
Pest Control	\$300
Trash Removal	\$1,020
Janitor Supplies	\$2,600
TOTAL	\$50,000

FY 2027 Working Budget

The following shows the FY 2027 Working Budget, with contingencies included, in full and segregated by fund.

Authorization of this document authorizes the Director to work within the budget lines defined in these sections.

Acct. No.	Library Fund	FY 2027 Budget
5010.010	Director	\$88,322.50
5020.010	Assistant Director	\$68,556.80
NEW	Programming/Outreach Manager	\$55,702.40
5035.010	Library Asst. II (6 positions)	\$194,176.42
5030.010	Library Asst. I (8 positions)	\$148,267.78
5017.010	Bonuses	\$5,000.00
Personnel Total		\$560,025.91
6025.010	Adult Programming	\$6,530.50
6030.010	Youth Services Programming	\$14,000.00
Programming Total		\$20,530.50
6045.010	Accounting/Payroll	\$13,000.00
6050.010	Legal Fees	\$1,000.00
6052.010	Software Fees	\$34,000.00
Professional Fees		\$48,000.00
6055.010	Internet	\$5,000.00
6060.010	Telephone	\$5,500.00
6065.010	Postage	\$2,200.00
6165.010	Utilities	\$55,000.00
6114.010	Processing Materials	\$4,000.00
6115.010	Office Supplies	\$4,000.00
6160.010	Contingency/Misc.	\$200.00
6140.010	Refunds	\$700.00
6048.010	Administrative Fees	\$3,000.00
Administrative Costs		\$79,600.00
6100.010	Books	\$49,000.00
6101.010	Visual	\$18,000.00
6103.010	Audio	\$0
6105.010	Periodicals	\$3,600.00

Acct. No.	Library Fund	FY 2027 Budget
6112.010	Online Databases	\$30,500.00
6110.010	Youth Books	\$33,000.00
6111.010	Youth Visual	\$2,000.00
6116.010	Youth Audio	\$0
Materials		\$136,100.00
5050.010	Group Hospital Ins (5 positions)	\$88,000.00
5055.010	Life Insurance	\$150.00
Insurance		\$88,150.00
6149.010	Capital Expenditures	\$20,000.00
NEW	Contractual Expenses	\$72,000.00
	Reserves	\$40,294.59
Fund Subtotal:		\$1,141,701.00

Acct. No.	Library Fund	FY 2027 Budget
6090.010	Grants	\$68,000.00
Grants		\$68,000.00

Acct. No.	Library Fund	FY 2027 Budget
6091.010	Donations/Memorials	\$40,000.00
6029.010	RISE	\$0
Donations		\$40,000.00

Acct. No.	Library Fund	FY 2027 Budget
6015.010	Consultant/Professional Fees	\$3,000.00
6031.010	Marketing	\$30,000.00
6080.010	Training/Staff Development	\$2,450.00
6075.010	Dues	\$2,500.00
6070.010	Travel Expenses	\$2,500.00
Professional Fees		\$40,450.00
6040.010	Mainte/Office and Other Eq.	\$5,500.00
6150.010	Furniture and Equipment	\$4,000.00
Equipment		\$9,500.00
Fund Subtotal:		\$49,950.00

Acct. No.	Building and Maintenance Fund	FY 2027 Budget
6170.020	Mainte/Grounds (snow/mowing/weeding)	\$3,500.00
6185.020	Janitorial Service	\$25,000.00
6175.020	Mainte/Computers	\$35,000.00
6180.020	Improvements	\$3,000.00
6035.020	Mainte/Building	\$12,000.00
6150.020	Equipment	\$5,000.00
6155.020	Computer Equip.	\$6,500.00
Fund Subtotal:		\$90,000.00

Acct. No.	Audit Fund	FY 2027 Budget
6195.030	Annual Audit	\$4,000.00

Acct. No.	Liability Insurance Fund	FY 2027 Budget
6200.040	Liability Insurance	\$15,000.00
NEW	Legal Fees	\$0
6205.040	Maintenance/Safety	\$20,580.00
6210.040	Security System	\$500.00
6215.040	RFID Security System	\$10,000.00
6190.040	Pest Control	\$300.00
6085.040	Trash Removal	\$1,020.00
6130.040	Janitor Supplies	\$2,600.00
Fund Subtotal:		\$50,000.00

Acct. No.	Workman's Comp Fund	FY 2027 Budget
5065.050	Workman's Comp	\$1,800.00

Acct. No.	Unemployment Fund	FY 2027 Budget
5070.060	Unemployment Ins.	\$1,000.00

Acct. No.	IMRF Fund	FY 2027 Budget
5075.070	IMRF Employer Contributions	\$1,000.00

Acct. No.	Social Security/Medicare Fund	FY 2027 Budget
5080.080	Soc. Sec/Medicare Payments	\$1,000.00

Delayed Payments, Cash Shortfalls, and Unaddressed Expenses

In the event of delayed receipts of expected tax monies, the Library may operate utilizing reserve funds and/or working cash monies.

In the event of cash shortfalls where the actual tax income received is less than is expected, the Library may cover the shortfall with reserve funds and/or adjust the Working Budget, as directed by the board.

To cover unaddressed expenses, i.e. major repair projects not foreseen at this time, major upgrades in equipment or furnishing not foreseen at this time, etc., the Library may use the appropriate reserve funds, as directed by the board. In the case of emergency maintenance, the Director is authorized to work with the board co-presidents to make repairs that exceed budget lines stipulated in this document.

Illinois Public Library Standards: Standards Compliance

Core Standards

Illinois statute sets a minimum level of compliance for all public libraries and the Standards build upon that foundation. Below is a summary of how the Effingham Public Library meets or is working to meet the 12 standards. The Illinois State Library uses the “core” designation for each of the metrics as the minimum standard to address in the annual Public Library Per Capita Grant application.

Access

The library meets all of the core and intermediate metrics in Access. We meet most of the metrics for Advanced. Our library is not open 7 days/week and we do not have current plans to add this in our plan of service. The other two Advanced metrics are “provides dedicated spaces for other specific populations (such as a mother’s room or sensory space)” and “has energy efficient lighting throughout.” These are two areas that the library can and should consider in future planning.

Advocacy

The library meets all of the core and intermediate metrics in Advocacy. The only metric we do not meet in Advanced is “annually highlights data, stories and accomplishments from the year and disseminates it to external and internal stakeholders.” We have plans to start up our annual report that will be shared with the public once again during 2026.

Building and Grounds

With the approval of our first capital improvement plan, the library meets all of the core metrics in Buildings and Grounds. There are a few areas for improvement in the intermediate and advanced categories around better documentation that the library will be working on in 2027.

Collection Management

The library meets all of the core and intermediate metrics in Collection Management. The one advanced metric we do not currently meet is digitizing our special collections. Our Genealogy group is working on digitizing these collections, but there is not currently a completion date.

Finance and Budget

The library meets all of the metrics in the Core, Intermediate, and Advanced categories for Finance and Budget.

Governance and Administration

The library meets all of the metrics in the Core and Intermediate categories for Governance and Administration. In the Advanced category, we would need to have an attorney review our library policies and bylaws on a regular basis.

Human Resources

With the adoption of the succession plan for key positions, the library will meet all of the metrics in the Core and Intermediate categories for Human Resources. The remaining items in the Advanced category are typically out of reach for a library of our size (such as having a dedicated employee for human resources management, conducting our own benchmarking surveys, etc.).

Information Services

The library meets all of the metrics in the Core category for Information Services. The metric we do not meet in the Intermediate and Advanced categories has to do with having multilingual staff members available to assist. We are always looking for staff with additional language abilities, but it is hard to find.

Marketing and Promotion

The library meets all of the metrics in the Core and Intermediate category for Marketing and Promotion. The metric we do not meet in the Advanced category relates to an annual report that is shared with the public, which we plan to bring back in 2026.

Programming

We meet all of the metrics in the Core category for Programming. The only metric we do not meet in the Intermediate and Advanced categories is providing specific training for our programming staff. This is a great opportunity and one that we hope to implement in the coming 12-18 months.

Safety

The library meets all of the metrics in the Core and Intermediate category for Safety. The only metric we do not meet in the Advanced category relates to providing a dedicated staff member for the purpose of enforcing security. Our library is simply too small for this to be a viable option.

Technology

The library meets all of the metrics in the Core category for Technology. The metrics we don't meet in the Advanced category relate to having a dedicated IT staff, which our library is simply too small to offer.

Appendix A—Working Budget Detail