

PORTAGE DISTRICT LIBRARY BOARD

Regular Board Meeting
April 27, 2026

300 LIBRARY LANE, PORTAGE, MICHIGAN 49002



NOTICE OF REGULAR MEETING

PORTAGE DISTRICT LIBRARY BOARD

Regular Board Meeting, Monday, April 27, 2026 | 6:00 PM

The Library Board of the Portage District Library will hold a regular meeting on Monday, April 27, 2026 at 6:00 p.m. This meeting will be held at 300 Library Lane. The purpose of this meeting is for the discussion of library business. The Library gives notice of the following:

1. Meeting Attendance

The regular meeting is being held in person.

2. Procedures

The public may participate in the meeting in person and may make public comment through spoken or written methods. Each speaker has a time limit of three minutes. Please refer to the Policy for Public Comments at Meetings in its entirety on the library's website www.portagelibrary.info.

3. Contact Information

For those people who desire to contact members of the Library Board to provide input or ask questions on any business that will come before the public body at the meeting, please contact Quyen Edwards at qedwards@portagelibrary.info prior to the start of the meeting.

4. Persons with Disabilities

Persons with disabilities may participate in the meeting through the methods set forth in paragraph 2. Individuals with disabilities requiring auxiliary aids or services in order to attend electronically should notify Quyen Edwards at qedwards@portagelibrary.info within a reasonable time in advance of the meeting.

Dated: April 23, 2026

Quyen Edwards
Library Board Secretary

Portage District Library
300 Library Lane
Portage, MI 49002

AGENDA

April 27, 2026

I. Start of Meeting

II. Roll Call

III. Comments or Requests from the Public, Board Members, or Library Staff

The Board Chair will recognize one person to speak at a time, and each speaker must provide their name and address. Each speaker is entitled to one (1) three-minute time during this Public Comment period. Please refer to the Policy for Public Comments at Meetings in its entirety at (<https://qrco.de/bdiESq>) or the printed documents at the entrance to the meeting room on the evening of the Library Board Meeting.

IV. Adoption of the Agenda for the Regular Meeting of April 27, 2026 (1 minute) (Vote)

V. 2026 Marketing Plan

A. Presentation of the 2026 Marketing Plan by Marketing Manager Colin Whitehurst

VI. Consent Agenda (5 minutes) (Vote)

A. Minutes of the regular meeting held on March 23, 2026 *(Info) Pg. 5*

B. April 2026 Director's Report *(Info) Pg. 8*

C. Budget Amendment for Restricted Donation *(Info) Pg. 11*

D. Financial Condition for March 2026 *(Info) Pg. 12*

E. Statistical Report for March 2026 *(Info) Pg. 14*

F. May 2026 Program Calendar *(Info) Pg. 16*

G. Review Library of Things Policy *(Info) Pg. 17*

H. Art Exhibit Policy *(Info) Pg. 20*

I. Monitoring Report on Executive Limitation: Fundraising Activity *(Info) Pg. 22*

VII. Governance (20 minutes)

A. Scheduling of Mid-Year meeting with the Library Director *(Info) Pg. 24*

B. Friends of the Portage District Library Update *(Info) Pg. 25*

C. Programming Policy *(VOTE) Pg. 26*

VIII. Ends Development (20 minutes)

A. First Quarter 2026 Financials *(Info) Pg. 29*

B. First Quarter 2026 Strategic Plan Report *(Info) Pg. 32*

IX. Library Director's Reports (20 minutes)

A. Final remarks by Library Director for the April 27, 2026 Library Board Meeting

X. Process Evaluation (5 minutes total)

A. Suggestions for Agenda Items to be included on the May 18, 2026 Board Meeting

1. Minutes of the Regular Meeting held on April 27, 2026
2. Review of Patron Behavior Policy
3. Follow-Up on mid-year meeting with Library Director
4. Plans for 2026 Summer Reading

B. Miscellaneous

XI. Adjournment

MINUTES

From the March 23, 2026
Regular Board Meeting

I. Start of Meeting

II. Roll Call

III. Board Members Present: Board Members Absent: Library Staff Present:

Board Members Present: Ken Baker, Michele Behr, Jeanne Friedman, Cara Terry, Tom Vance, and Linda Whitlock

Board Members Absent: Donna VanderVries (excused)

Library Staff Present: Library Director Christy Klien, Rolfe Behrje, Quyen Edwards, Lawrence Kapture, Abby Pylar, Colin Whitehurst, and Laura Wright

Library Staff Absent: Ben Chee, Rob Foti, and Steve Rossio

IV. Comments or Requests from the Public, Board Members, or Library Staff

Library Board Chair Jeanne Friedman welcomed everyone to the March 23, 2026 Library Board Meeting. She asked if anyone present had any comments and there were none.

V. Adoption of the Agenda for the Regular Meeting of March 23, 2026

Library Board Chair Friedman asked if there were any changes to the agenda before its adoption and there were none. Friedman asked for a motion to adopt the agenda.

MOTION: It was moved by Trustee Vance and supported by Trustee Baker that the Library Board adopt the agenda for the regular meeting of March 23, 2026. Vote 6-Yes, 0-No, 1-Absent (VanderVries) Motion carried.

VI. Consent Agenda

Library Board Chair Friedman asked if there were any changes needed to the consent agenda for the March 23, 2026 board meeting before its adoption and none were requested.

- A. Minutes of the regular meeting held on February 23, 2026
- B. March 2026 Narrative
- C. Financial Condition for February 2026
- D. Statistical Report for February 2026
- E. April 2026 Program Calendar
- F. MLA Advocacy Update

MOTION: It was moved by Trustee Vance and supported by Trustee Behr that the Library Board approve the consent agenda for the regular meeting of March 23, 2026. Vote 6-Yes, 0-No, 1-Absent (VanderVries) Motion carried.

VII. Monitoring Reports

- A. Asset Acquisition and Disposal Administrative Procedure**
- B. Monitoring Report on Executive Limitation: Asset Protection**
- C. Monitoring Report on Executive Limitation: Financial Planning & Budgeting**
- D. Monitoring Report on Executive Limitation:
Financial Condition & Activities**

Library Director Klien said this is the Board's annual review and asked if there were any additional questions regarding the Monitoring Reports and there were none.

VIII. Library Director's Reports

- A. Final remarks by Library Director for the March 23, 2026 Library Board Meeting.**

Library Director Klien gave trustees a heads-up regarding a configuration error that has been identified in Libby and Hoopla. As a result of this issue, some non-eligible patrons (i.e., expired resident members and reciprocal borrowers) have received incorrect access to our digital collection. We will be closing their access in May/June and we anticipate this may lead to an increase in calls and inquiries. A letter is currently being drafted and will be mailed directly to all affected individuals notifying them of the issue. The letter will also direct them to their local library for similar services.

Library Director Klien is working with Business Manager Rob Foti and HR Contractor Stefon Hemphill on FMLA training in anticipation for hitting the 50 employee mark.

Next week is PLA (Public Library Association) conference in Minneapolis. Library Director Klien, Head of Circulation and Technical Services Abby Pylar, and Adult Services Librarian Rachael Wiegmann will be in attendance.

IX. Process Evaluation

- A. Suggestions for Agenda Items to be included on the April 27, 2026 Board Meeting**
 - 1. Minutes of the Regular Meeting held on March 23, 2026.
 - 2. Review of Art Exhibit Gift Policy.
 - 3. Review of Programming Policy.
 - 4. Review of Library of Things Policy
 - 5. Report from Board Liaison to the Friends of the Library.
 - 6. Scheduling of mid-year meeting with the Library Director.
 - 7. 1st Quarter Financial Report for FY 2026.
 - 8. 1st Quarter 2026 Strategic Plan Report
 - 9. Monitoring Report on Executive Limitation: Fundraising Activities.
- B. Miscellaneous**

X. Adjournment

Library Board Chair Friedman said if there was no further business to be considered, that she would accept a motion to adjourn the regular board meeting of March 23, 2026.

MOTION: It was moved by Trustee Vance and supported by Trustee Behr that the Library Board adjourn the regular meeting of March 23, 2026.
Vote 6-Yes, 0-No, 1-Absent (VanderVries) Motion carried.

DISPOSITION: The regular board meeting of March 23, 2026 was adjourned at 6:11 PM.

Recorded and Transcribed by,

A handwritten signature in black ink, appearing to read "Quyên Edwards". The signature is written in a cursive style with a prominent loop at the end.

Quyên Edwards
Library Board Secretary

Director's Report

March 2026

Adult Services

On Tuesday, March 11th, Adult Services Librarian [Ruth Cowles](#) hosted Pub(lic) Library Trivia: Sports Edition. Three teams competed to answer questions about sports throughout the years. The winning team won by only one point and received gift cards to Erbelli's purchased through a generous donation by the Friends of the Library.

On March 18th, Adult Services Librarian [Rachael Wiegmann](#) hosted a Speed Friending event for those between the ages of 60-80. Participants arrived and sat across from a stranger where they were given 2 minutes and 30 seconds to get to know them. They then moved clockwise to meet a new person. This cycle was repeated until all participants had a chance to meet each other. The participants enjoyed their time and traded contact information. After the event, participants enjoyed snacks and soda while getting to know each other more. One woman was overheard saying we "should do speed dating in the future."

On Wednesday, March 4th, Adult Services Librarian [Jacob Lambert](#) hosted WMU's Professor Stephen Covell for a lecture on Buddhist wellness practices as part of an ongoing series of talks connecting local academics with the general public. The program exceeded 30 attendees, and the talk provoked a lively Q&A discussion that lasted nearly 15 minutes later than expected.

Youth Services

The most important March addition to the Youth Department occurred with the arrival of [Emily Mingle's](#) baby on the 1st. We're so happy to welcome this sweet new PDL member!

On March 5th, Youth Staff [Andrea Smalley](#) and [Kristen McNeal](#) promoted the library at Woodland Elementary's annual Family Literacy Night.

On March 13th, Youth Outreach Librarian [Andrea Smalley](#) gave a library presentation to the KRESA English Learner Collaborative, a Kalamazoo region community of practice for multilingual learner educators. The presentation covered PDL services, programs, and materials with special appeal to multilingual learner students and families. EL Collaborative attendees also provided valuable feedback on how to improve accessibility to services.

On March 19th, Youth Staff [Andrea Smalley](#) and [Sarah Hatley](#) attended the second annual PPS Enrollment Event held at North



Middle School. PPS administration estimated that over 550 new students and families attended the event and enrolled for the 2026-2027 school year. PPS staff said "Thank you to the library for keeping our little ones engaged and pumping out an endless supply of buttons."

On March 24th, Youth Staff [Andrea Smalley](#) and [Kristy Zeluff](#) visited the Young 5s class at Central Elementary to celebrate March is Reading Month. We shared stories and made magnets of the kid's favorite book covers.

Youth Services staff members [Olivia Pennebaker](#) and [Kristin McNeal](#) hosted Teen Cupcake Decorating Competition, a popular annual event that gives teens an opportunity to engage in creativity, comradery, and candy eating.



Youth Staff [Laura Wright](#) hosted March's Elementary Maker Minute, "The Fun and Science of Wind". Elementary attendees and their grownups experimented with a wind tunnel and AirZooka, constructed Wind Toobz, and built LEGO sail cars.



Heritage Room

From ReCollect:

We are standing on the southwest corner of South Westedge Avenue and West Milham Avenue in Portage looking towards the southwest. It is March of 1961, and the brand-new Cities Service Station is preparing for its Grand Opening. A full-service station complete with gas pumps and automobile repair bays, it was located in the parking lot of the recently opened Southland Shopping Center (6012 South Westedge) and would serve the community for many years until being closed and converted into a Fannie May Candies. The original building would last well into the 2010's when it was demolished and replaced with an Urgent Care facility that occupies the same footprint of the original structure.

Makerspace

Makerspace Coordinator [Jamie McKinney](#), along with local artist Haley Labian ran a workshop in collaboration with Portage Parks and Rec on how to utilize the Makerspace. We started at the Parks and Rec building to have a presentation on how to utilize Canva for business signage, mailings, email formatting etc. Following this, we walked over to the Makerspace to get a tour of the space and see some of the machines in action. Since this event we have had a couple business owners come back to utilize the space.



Circulation & Technical Services

During the month of March, we had 802 students utilize their PASS cards. We sent out 3,279 SMS messages regarding holds, bills, overdue materials, and account renewals.

Personnel

The Library has hired two (2) Library Aides, *Faith Lacey* and *Katie Cowles*, and a Makerspace Assistant, *Carolyn Douglass*, in the last month. Additionally, the Library is reviewing the Adult Librarian-Outreach position job description and will be posting that position in early May. *Christy Klien* and *Rob Foti* are working with the library's part-time HR consultant to update a few employee handbook policies and begin looking at new policies that will need to be added in the upcoming years. Along with this, they are also getting professional development on Family Medical Leave Act (FMLA), in preparation for staff eligibility later this year. Preparations are beginning for the Library's annual financial audit. Fieldwork will begin with Rehmann in early May and conclude with the audited financial statement presented to the library board in June. Budgeting is underway and will ramp up in May with a preliminary budget presented to the board at the June meeting.

Information Technology

In March 2026, the IT Department began receiving its order for public access computers. The public access computer project will replace its existing PAC internet computers, its Catalog Search computers, its Creation Station computers and add circulating PAC laptops/pilot inhouse PAC ipads. The library is using its established non-profit status with Microsoft/Adobe to renew software licensing according to the vendor's new policies and procedures.

The library is also upgrading the tools to manage its PAC computers and mobile devices. Using the deepfreeze cloud edition, library technical staff will manage these services remotely, automate the patching and updating of these devices as well as secure the devices for session-by-session usage. This refresh/upgrade project provides patrons with reliable and modern equipment to access the information and resources they desire.

The IT department is currently working to remediate minor issues on its hosted servers, is planning a network redesign to better multi-path its fiber connections, and will be scheduling major upgrades to its firewall and Anti-Virus solutions.

The IT Department is finishing its transition of its website server to a new platform. On this new platform the library will add the functionality to clone and test changes before implementation. This service will minimize service disruptions due to unforeseen errors.

Maintenance & Building Services

During the past month, the library's fire protection systems were inspected and successfully passed all required checks. Fish Window Cleaning completed comprehensive cleaning of all facility glass, and scheduled pest control services were conducted with excellent results. Staff continued routine cleanup and tidying of the library grounds to maintain a safe and welcoming exterior. Additionally, ongoing HVAC issues are being addressed in coordination with Allied Mechanical, with troubleshooting and corrective work currently underway.

Memo

Budget Amendment for Youth Technology Collection

To: Portage District Library Board
From: Christy Klien, Library Director
Date: April 16, 2026

Background

The Library has received a generous donation of \$1,500 from a current library board member, Cara Terry. This donation will be used to purchase an in-house browsing collection of books to complement the working 3D printer display in the Youth Area. This will include both informational and fiction titles related to technology and maker projects.

Recommendation

I recommend that the Library Board approve a Budget Amendment to the Fiscal Year 2026 Budget to increase the Books – Juvenile Non-Fiction expenditure line by \$1,500 to accommodate this gift.

Financial Condition Report

March 2026

Executive Limitation Policy on Financial Condition and Activities: With respect to the actual, ongoing financial condition and activities, the Director shall not cause or allow the development of fiscal jeopardy or a material deviation of actual expenditure for board priorities established in Ends Policies. Accordingly, he or she may not:

Policy: 1. Expend more funds than have been received in the fiscal year to date unless the debt guideline (below) is met.

Director's Response: Revenue \$8,778,565
Expenditures \$3,039,007

Fund	2/28/2026	Changes	3/31/2026
General Reserve (13%)	\$ 915,639	-	\$ 915,639
Building Reserve	50,000	-	50,000
Benefits Reserve	29,741	-	29,741
Technology Reserve	111,305	-	111,305
Patio Feasibility Reserve	4,700	-	4,700
Bldg. Improvement Reserve	731,419	-	731,419
Personal Property Tax Reserve	805,946	-	805,946
Library Endowments	95,766	-	95,766
Unassigned Fund Balance	8,951,970	-	8,951,970

Policy: 2. Indebt the organization money in an amount greater than can be repaid by certain, otherwise unencumbered revenues within 60 days.

Director's Response: No new money has been borrowed that cannot be repaid within 60 days.

Policy: 3. Use any long-term reserves.

Director's Response: No reserves have been used.

Policy: 4. Conduct inter-category shifting in amounts greater than can be restored to a condition of discrete fund balances by certain, otherwise unencumbered revenues within 30 days.

Director's Response: No Inter-category shifting has taken place.

Policy: 5. Fail to settle payroll and debts in a timely manner.

Director's Response: Payroll is processed by Paylocity. (Payroll service) bi-weekly. Payables are also Processed monthly or "as needed".

Policy: 6. Allow tax payments or other government-ordered payments for filings to be overdue or inaccurately filed.

Director's Response: All reports and tax payments are filed according to policy.

Policy: 7. Make a single purchase or commitment of greater than \$10,000 not already found in the budget. Splitting orders to avoid this limit is not acceptable.

Director's Response: No unbudgeted purchase that exceeds \$10,000 has been made.

Policy: 8. Acquire, encumber or dispose of real property.

Director's Response: No real property has been acquired, encumbered, or disposed.

Policy: 9. Fail to aggressively pursue receivables after a reasonable grace period.

Director's Response: All receivables are being pursued according to policy.

Policy: 10. Fail to provide the Library Board with a one page monthly financial indicator monitoring report and a quarterly background financial monitoring report.

Director's Response: A financial indicator monitoring report is provided each month and a quarterly background financial monitoring report is provided each quarter.

Policy: 11. Fail to arrange for an external financial audit of the library services.

Director's Response: An external audit of the library is conducted each year and results presented to the library board.

Policy: 12. Fail to have appropriate authorized signatures on bank documents: Library Director, Library Business Manager and Library Board Chair.

Director's Response: Appropriate authorized signatures are on all bank documents.

Policy: 12-A. Fail to have a 2nd signature on all checks issued by the Portage District Library in an amount of \$20,000 or more by one of the three designated individuals on the library's bank signature card, which would be one of the following: (1) the Library Board Chair, or (2) the Head of Adult Services, or (3) the Head of Youth Services.

Director's Response: All checks received the appropriate amount of signatures.

Policy: 13. Fail to consider approved budget when entering into financial agreements or collaborations with other entities.

Director's Response: Approved budgets are considered when entering into financial agreements or collaborations with other entities.

Policy: 14. Fail to keep the Library Board informed of any grant applications, and obtain board chair signature when required by granting agency.

Director's Response: The Library Board is informed of all grant applications and the board chair's signature is obtained when required.

Policy: 15. Fail to provide the Board Chair a list of all cash disbursements from the time of the prior Board meeting to the current Board meeting.

Director's Response: A list of all cash disbursements has been provided to the Board Chair for review.

Statistical Report

March 2026

	Month Statistics			YTD Statistics		
	Mar-26	Mar-25	CHANGE	2026	2025	CHANGE
Circulation/Collections						
Total Library Circulation	86,960	86,997	-0.04%	244,768	246,826	-0.83%
Adult - Books	16,794	17,622	-4.70%	49,211	51,021	-3.55%
Adult - A/V	3,080	2,977	3.46%	8,807	8,657	1.73%
Youth - Books	33,525	34,043	-1.52%	90,724	91,504	-0.85%
Youth - A/V	3,125	3,060	2.12%	8,575	8,026	6.84%
Hot Picks	809	662	22.21%	2,424	1,818	33.33%
E-Material	27,713	26,790	3.45%	79,891	80,538	-0.80%
ILL - PDL Requests	1,229	1,206	1.91%	3,164	3,284	-3.65%
ILL - Other Lib. Requests	685	637	7.54%	1,972	1,978	-0.30%
Self-Checkout Percentage	0.00%	54.15%		34.18%	53.78%	
Total Library Collection	176,521	180,099	-1.99%			
Adult - Books	70,528	71,418	-1.25%			
Adult - A/V	7,718	9,684	-20.30%			
Youth - Books	90,839	89,223	1.81%			
Youth - A/V	5,924	7,254	-18.33%			
Hot Picks	1,512	2,520	-40.00%			
Net Acquisitions	427	2,492	-82.87%	2,524	3,282	-23.10%
Purchased - Books	2,328	3,461	-32.74%	7,713	7,702	0.14%
Purchased - A/V	154	129	19.38%	588	365	61.10%
Donated - Books	0	1	-100.00%	0	1	-100.00%
Donated - A/V	0	1	-100.00%	0	1	-100.00%
Material Discarded	(2,055)	(1,100)	-86.82%	(5,777)	(4,787)	-20.68%
Total In-House Usage*	0	0	100.00%	0	0	n/a
In-House Periodical Usage	0	0	100.00%	0	0	n/a
In-House Book Usage	0	0	100.00%	0	0	n/a
Patrons						
Total Patrons	34,626	33,872	2.23%			
Adult	18,006	17,283	4.18%			
Youth	1,856	2,078	-10.68%			
Non-Resident	266	231	15.15%			
Reciprocal	4,112	3,566	15.31%			
Internet User	1	564	-99.82%			
PASS Users	10,328	10,090	2.36%			
Professional	57	60	-5.00%			
Net Patrons	(120)	173	-169.36%	181	564	-67.91%
Adult	194	222	-12.61%	547	627	-12.76%
Youth	19	9	111.11%	37	26	42.31%
Non-Resident	0	3	-100.00%	3	6	-50.00%
Reciprocal	70	73	-4.11%	226	232	-2.59%
Internet User	0	10	-100.00%	0	72	-100.00%
PASS Users	2	7	-71.43%	45	63	-28.57%
Professional	0	1	-100.00%	1	2	-50.00%
Patrons Removed	(405)	(152)	-166.45%	(678)	(464)	-46.12%

	Month Statistics			YTD Statistics		
	Mar-26	Mar-25	CHANGE	2026	2025	CHANGE
Library Building Usage						
Total Meeting Room Usage	788	924	-14.72%	2,435	2,693	-9.58%
Internal/Collaboration	125	135	-7.41%	352	375	-6.13%
External/Outside Usage	663	789	-15.97%	2,083	2,318	-10.14%
Total Program Audience	3,252	5,283	-38.44%	9,286	11,534	-19.49%
Adult	704	1,583	-55.53%	2,486	3,865	-35.68%
Youth	2,347	3,492	-32.79%	6,275	7,180	-12.60%
Heritage Room	201	208	-3.37%	525	489	7.36%
Total Number of Programs	107	125	-14.40%	309	319	-3.13%
Adult	52	58	-10.34%	154	159	-3.14%
Youth	52	64	-18.75%	145	153	-5.23%
Heritage Room	3	3	0.00%	10	7	42.86%
Total Volunteer Hours	162	187	-13.37%	471	640	-26.41%
Adult	55	83	-33.73%	158	226	-30.09%
Youth	31	36	-13.89%	93	187	-50.27%
Technical	16	11	45.45%	36	46	-21.74%
Circulation	28	25	12.00%	88	83	6.02%
Administration	32	32	0.00%	96	98	-2.04%
Community Service	0	0	0.00%	0	0	0.00%
Total Front Door Traffic	20,776	21,009	-1.11%	56,201	56,862	-1.16%
Total Youth Services Traffic	15,687	15,707	-0.13%	42,997	43,062	-0.15%
Total Business Center Traffic	0	0	0.00%	0	0	0.00%
Information Access/Reference/Research						
Total Reference Transactions	8,187	6,777	20.81%	24,722	20,298	21.80%
Adult Phone	580	530	9.43%	1,907	1,820	4.78%
Adult Ready Reference	1,149	1,707	-32.69%	3,300	4,730	-30.23%
Adult Reference	86	212	-59.43%	280	647	-56.72%
Youth Phone	81	60	35.00%	265	251	5.58%
Youth Ready Reference	3,227	2,984	8.14%	8,882	8,913	-0.35%
Youth Reference	184	303	-39.27%	543	850	-36.12%
HR Phone	2	11	-81.82%	14	34	-58.82%
HR Ready Reference	265	279	-5.02%	782	734	6.54%
HR Reference	15	20	-25.00%	39	33	18.18%
Circ Phone	641	425	50.82%	1,835	1,508	21.68%
Circ Ready Reference	605	131	361.83%	2,987	283	955.48%
Circ Reference	1,352	115	1075.65%	3,888	495	685.45%
Total Edutainment LAN Use	0	366	-100.00%	0	485	-100.00%
Total Internet Computer Use	1,815	1,865	-2.68%	5,136	5,113	0.45%
Youth Computers	201	221	-9.05%	605	649	-6.78%
Adult Computers	1,612	1,633	-1.29%	4,525	4,445	1.80%
Laptop Computer Circulated	2	11	-81.82%	6	19	-68.42%
Total Electronic Transactions	65,218	52,394	24.48%	195,860	135,694	44.34%
WebSite Hits	54,672	41,417	32.00%	163,012	102,437	59.13%
WebCatalog Sessions	9,234	9,543	-3.24%	28,028	28,388	-1.27%
Licensed Database Hits	1,312	1,434	-8.51%	4,820	4,869	-1.01%

* In-house Use Statistics will be done for one week each quarter.

Library Closed due to COVID-19 on March 13, 2020

Christy Klien, Library Director

Kalamazoo County Historical Society

Monday, May 04
7:00pm - 8:30pm

Yoga with Apral

A gentle approach
Tuesday, May 05
4:00pm - 5:00pm

Know Your Rights!

Tenant-Landlord Workshop
with Legal Aid
Tuesday, May 05
6:00pm - 7:00pm

Muffins and the Market

An investment discussion group.
Thursday, May 07
9:00am - 10:00am

Family Book Club Trivia

Thursday, May 07
6:00pm - 7:00pm

Documentary and Donuts

Joyce Carol Oates.
Runtime 1:34. 2023.
Friday, May 08
10:00am - 1:00pm

Speed Friending

Focused on the
Neurodivergent Population
Tuesday, May 12
5:30pm - 7:00pm

Kids' Dip Club - 3rd - 5th Grades

Wednesday, May 13
4:30pm - 5:30pm

Pop Culture Trivia

Test your knowledge!
Wednesday, May 13
6:00pm - 7:30pm

Cupcake Decorating Tips

With pastry artist and baker, Katie
Wittenberg
Thursday, May 14
6:00pm - 7:00pm

International Mystery Book Discussion

"Magpie Murders,"
by Anthony Horowitz
Thursday, May 14
7:00pm - 8:00pm

Kalamazoo Macintosh Users' Group

Saturday, May 16
9:00am - 12:00pm

Saturday Sound Immersion

Saturday, May 16
10:30am - 11:30am

Light Lunch and Literature

"White Nights,"
by Fyodor Dostoyevsky
Monday, May 18
12:00pm - 1:00pm

Kalamazoo Valley Genealogical Society

General Meeting & Program
Monday, May 18
7:00pm - 8:30pm

Kalamazoo County ID Program

Mobile Unit Event
Tuesday, May 19
3:00pm - 5:00pm

Caregiving for a Loved One Experiencing Cognitive Decline

with Courter Memory Center
Tuesday, May 19
6:00pm - 7:00pm

Plots and Pages

A Local Writers' Group
Tuesday, May 19
6:00pm - 8:00pm

Professional Headshots at PDL

Enhance your R√©sum√© and Social
Media!
Wednesday, May 20
6:00pm - 7:00pm

Teen Volunteer Info Meeting

Wednesday, May 20
6:00pm - 7:00pm

Professional Headshots at PDL

Enhance your R√©sum√© and Social
Media!
Wednesday, May 20
7:00pm - 8:00pm

Muffins and the Market

An investment discussion group.
Thursday, May 21
9:00am - 10:00am

Drop-In Genealogy Help

Solve your Genealogy Roadblocks
Thursday, May 21
10:00am - 12:00pm

Yoga with Apral

A gentle approach
Thursday, May 21
4:00pm - 5:00pm

Collage Postcard

A note to your future self.
Thursday, May 21
6:00pm - 8:00pm

Kalamazoo Area Wild Ones

How Nature Made Me a Better
Human Being
Wednesday, May 27
6:30pm - 8:00pm

Cooking Demo with Chef Gandia!

Live on the Charlie Cart!
Thursday, May 28
6:00pm - 7:00pm

2026 Michigan Notable Book Author Tour

Cheryl Neely
Saturday, May 30
11:00am - 1:00pm

Library of Things

Lending Policy and Agreement

I. Purpose and Selection

The Portage District Library recognizes the need to circulate items that may be outside the scope of traditional library materials. Therefore, the Library has developed a "Library of Things." The Library staff will select materials for the Library of Things based on the criteria identified in the Library's Material Selection Policy. Any requests for reconsiderations of "Things" will be processed under the same procedure as reconsideration of library materials in the Material Selection Policy.

II. Guidelines for Borrowing and Use

Portage District Library will provide a current list of "Things" but the list may be changed from time to time. The Library will divide the list into Tier 1 and Tier 2 items based on safety and financial factors. The Library does not guarantee the availability of any items on the list.

- A.** Tier 1 Things can be checked out by any PDL resident, paying non-resident, or teacher card in good standing. Tier 2 Things can only be checked out by PDL resident, paying non-resident, or teacher card in good standing that is age 18 and older.
- B.** A signed waiver form and a valid ID is required for Tier 2 items.
- C.** Checkout is 14 days with up to 2 renewals if there are no holds.
- D.** Items must be returned between checkouts.
- E.** Things must be checked out and returned to a staff member at the circulation desk of the Portage District Library where you will wait for the initial check-in of item.
- F.** Limit of 2 checkouts at a time
- G.** Patrons may not lend the Thing to another person. Patrons are fully responsible for items borrowed.

III. Patrons Must

- A.** Be a resident, paying non-resident, and teacher cardholder with Portage District Library
- B.** Be 18 years old or older to check out Tier 2 items. Provide a valid Driver's License or State ID with a picture and current address at the time of checkout and read, understand, and execute a Borrower's Agreement outlined below at the circulation desk.
- C.** Patrons 17 years old or younger may only check out Tier 1 Things.

IV. Fines and Liability

- A.** Checked-out material that is not returned within 28 days of the due date (or subsequent renewal dates) will be considered to be Lost Material by the Library, and the Lost Item fees and regulations will apply.
- B.** If a billed item is returned in good condition before being referred to collections, the bill will be removed from your account.
- C.** Accounts that have been billed for \$25.00 or more in lost or damaged material and remain unresolved or unpaid for more than 28 days may be referred to a private notification service but not reported to a credit bureau. Once an account has been sent to collections, a non-refundable fee equal to the private notification service fee charged to the library will be charged to the user's account.
- D.** If any components of the Things or the packaging are lost, damaged, or altered, a replacement fee equal to the cost of the item will be billed to the user's account.
- E.** A list of replacement costs of Things is maintained by the Library and is available for viewing upon request.
- F.** The Library is not responsible for the loss of data, manufacturing defects in quality of workmanship or materials inherent in any borrowed Thing, or any damage caused while using a Thing.
- G.** Borrowers must cease using the Thing immediately and notify the Library if the Borrower has any concerns about the safety or state of repair of a Thing.
- H.** Michigan Penal Code, Act 328 of 1931, MCL 750.362 and 362a, provides that any person who converts for their own use or fails to return rented tangible library property shall be guilty of larceny, and may be prosecuted for a misdemeanor.

V. Care and Operation

- A.** The Thing may only be used and operated in compliance with the Library's policies and manufacturer's guidelines. Use care when handling and using the Thing. The Library makes no representation or warranty as to the fitness for use or condition of the items. Borrowers are responsible for reading and abiding by all manufacturer's recommendations, warnings, instructions for use, Library policies and all state and federal laws governing the use of that item.
- B.** Borrower shall not make any modifications or alterations to the Thing.
- C.** All Things shall be returned in the same condition as they were when issued, excluding normal wear and tear. All Things that are tools shall be returned clean. Return the Thing with all parts, components, and accessories.

VI. Violations and Appeals

- A.** The Library Director or designee may refuse to lend any of the Things if a patron has violated this Policy, including losing or damaging any Thing or violating terms of the Borrower's Agreement.
- B.** The patron may appeal the Library Director or designee's decision to the Library Board by filing a written appeal with the Library Board Chair within 10 business days of the notice of refusal.

Library of Things

Borrower Agreement

Patron Name: _____

Library Card Number: _____

Phone Number: _____

Item Borrowed:	Item Number:	Replacement Cost

Note: the item(s) must be returned on the due date before closing time.

I understand that I am fully responsible for the item(s) borrowed above (the term "Item" includes the item referenced above and all of the accessories for that item) and for the safe and timely return of the Item(s) to a Library staff member. **If the Item(s) or any part of the Item(s) are damaged, lost, or stolen, or late fees are incurred, I understand that I am responsible for all applicable charges.** My signature below indicates that I have read, understand, and agree to the terms of the Borrower Agreement and to pay for any items that are damaged, lost or stolen as determined by the Library. I agree to return the Item(s) by the due date and time listed on this Borrower Agreement. If the Item(s) are not returned by the due date, I understand that the Library has the authority to contact law enforcement to recover the Item(s) and that I may be subject to criminal charges. In addition, I grant my written consent for the Library to provide any information to law enforcement that is necessary to recover or assist in the prosecution regarding the Item(s) not returned by the due date.

In being permitted to borrow the Item(s), I hereby voluntarily waive, release, and discharge and covenant not to sue the Portage District Library, its successors, assignees, officers, agents, employees and volunteers (the "Releasees") for any and all claims, actions or demands of any kind, nature and description, including claims or actions for damages of death, personal injury, property damage and loss of data, and from any and all liabilities, damage, injuries, actions or causes of action either at law or in equity, whether caused by any defect in the Item, negligent act or omission of the Releasees, or otherwise arising out of or in any way related to or connected with my borrowing or use of the Item.

This is a legally binding release, waiver, discharge, and covenant not to sue, made voluntarily by me, the undersigned releaser, on my own behalf, and on my behalf of my heirs, executors, administrators, legal representatives, and assigns.

I have read the entire document and my signature below indicates my agreement with the above statements

Signature of Borrower: _____

Date: _____

Art Exhibit Policy

Reviewed & Approved: 4-27-2026

Art exhibits in different formats are welcome at Portage District Library. Exhibits stimulate interest in a variety of library materials, provide information, develop aesthetic appreciation, and offer an opportunity for individual and/or groups to display artistic and educational materials. The Portage District Library provides space for exhibits and displays of a civic, educational, cultural, or recreational nature.

Display areas may also be used for Library purposes such as to display materials from the Library's collection, or to publicize Library services, collections, or activities. Thus, this policy does not apply to the Library's use or co-sponsored use and the Library's use and co-sponsored use has first priority. When not used for Library sponsored or co-sponsored events, space designated by the Library for public use may be used for exhibits and displays pursuant to this Policy.

I. General Principles

- A. It is not the goal of the Portage District Library to build an art collection.
- B. Exhibit and display areas are available on an equitable basis regardless of the beliefs or affiliations of individuals or groups requesting their use.
- C. The Library does not endorse content nor imply agreement or disagreement with beliefs or viewpoints expressed in the exhibits or displays.
- D. Display space is limited.

II. Temporary Exhibits

- A. Acceptance and placement of an art exhibit will be determined by the Library Director or designee. Those who wish to display their artwork at the Portage District Library must read and sign the "Art Where You Are Artist Contract". Permission for hosting an art reception, and for conducting any activities or mounting displays during an art reception, will be granted at the discretion of the Library Director or designee.
- B. The Library reserves the right to determine at its sole discretion what materials will be displayed as well as scheduling, duration, and assignment of exhibit and display spaces. Applications for exhibits or displays will be reviewed in light of the Library's educational, cultural, intellectual, or recreational purpose and community interest. The limitations on space will also be taken into consideration.
- C. Length of time for each display will be determined by the Library Director or designee. Set-up and removal dates will be determined in advance.
- D. Sales transactions may occur on the library premises during gallery hops or special art receptions. However, artists must delay delivery of any purchased artwork to buyers until the agreed upon exhibit schedule at the library had concluded. No price tags may be affixed to any artwork on exhibit at the library, but price lists will be made available to the public at the Adult Information Desk for the duration of the art exhibit. Subject to the approval of the Library Director, artists may display their names, addresses, and telephone numbers on their artwork.

- E.** The Library must be provided with a license to use images of the artwork for Library uses, including but not limited to advertising, brochures, posters, catalogs, the Library's website or similar uses.
- F.** The Exhibitor may be identified by name within the exhibit or display.
- G.** The library's Curator is responsible for installing and labeling the exhibit or display on the agreed upon date.
- H.** All exhibits or displays must be set up and removed with as little interference as possible to the daily operations of the Library. Once the exhibit or display is installed, changes may be made only with Library approval.
- I.** The library's Curator shall remove the exhibit or display promptly on the agreed upon date at the end of the scheduled period. Exhibits or displays will be considered for exhibit for longer than the scheduled period with written approval of the Library Director or his/her designee.
- J.** The Library has the right to remove exhibit or display materials if they are not picked up by the agreed upon date. Exhibit materials may be disposed of if not claimed within sixty (60) days after the scheduled display period.
- K.** Exhibitors may not charge an admission fee or request donations.
- L.** Damages to the premises, equipment or furnishings as a result of the Exhibitor's use will be charged to the Exhibitor.

III. Decision and Appeal

- A.** The Library Director or his/her designee shall make the determination regarding the use of exhibit and display spaces. The Library Director or his/her designee has the right to review the materials, including promotion or publicity materials, in advance. The Library Director's decision shall be final.
- B.** Any person or organization aggrieved by the Director or designee's decision may appeal that decision to the Library Board. Such appeal shall be made within ten (10) business days of the decision. The appeal letter must indicate it is an appeal and be sent to the Library Director.
- C.** The Library reserves the right to remove any item from an exhibition or display on the above grounds or if the exhibition is a possible safety hazard, is too large for the display space, creates a maintenance problem, exceeds acceptable noise and light levels, interferes with the public service or other activities in adjacent Library areas or has been displayed without authorization.

Monitoring Report

Executive Limitation Policy on Fundraising Activities

The Library Director shall not allow library assets to be unprotected, inadequately maintained or unnecessarily risked. Accordingly, the Library Director shall not:

Policy: Utilize programs within the realm of normal library operation as fundraising vehicles.

Director's Response: There have been no instances of any library programs being used as fundraising vehicles within the realm of normal library operations. In the case of library programs that require extraordinary supplies, a nominal fee may be charged to program registrants to recover the cost of the program provisions.

Policy: Allow library facilities to be used by outside agencies for the purpose of fundraising, unless the funds being raised are going to be used for library purposes.

Director's Response: The library adheres to a strict rule about no outside agencies using the library facilities for the purpose of fundraising. The library's Community Meeting Room Policy states that: "Approved use of the library's community meeting rooms does not include selling or moneymaking enterprises except those that may be sponsored by the Portage District Library itself, or the Friends of the Portage District Library."

Policy: Permit the presentation of any fundraising program at the library without the approval of the Library Director.

Director's Response: There have been no instances of any fundraising programs being conducted at the library. The fundraising conducted by the library is done via the Annual Campaign mailing to donors, the Spring Appeal, and grant writing.

Policy: Allow donor lists to be shared with any other entity or charitable agency.

Director's Response: The library is in complete compliance with the rule to never share donor lists with any other entity or charitable agency. The Portage District Library fundraising activities include an Annual Campaign direct mailing initiative that is carried out at the end of each year. We send this solicitation to all of our previous donors and to all active library users requesting financial assistance to further enhance the library's special initiatives. Annually, a request is made to the Library Board to allow the Portage District Library to enter into a contract with our regular printing vendor to use the library's patron database for the restricted, confidential and sole purpose of sending a direct mailing to previous donors and to active library users in October or November. The contract with our regular printer stipulates that the printer or any associate or partner of the printer will not use the library's patron database for any other purpose, nor will the printer share the confidential patron information with any other parties.

Policy: Enter into any fundraising agreement that requires the library to permanently endorse a product or [promote an individual or business], without prior knowledge and approval of the Library Board.

Director's Response: There have been no instances of the library entering into any fundraising agreement that requires the library to permanently endorse a product or promote an individual or business.

Policy: Enter into any fundraising agreement that requires the library to take on responsibility, financial or otherwise, that would be above and beyond the provisions in the current budget or that would necessitate an increase in staffing level, without prior knowledge and approval of the Library Director.

Director's Response: The library is in full compliance with this mandate and has not entered into any fundraising agreement that would obligate or burden the library financially or otherwise.

Policy: Receive any funds for the library that have restrictions placed on their use, without prior knowledge and approval of the Library Director.

Director's Response: The only instances of funds received by the library that have restrictions placed on their use are memorial donations made specifically in memory of someone with requests for the purchase of particular materials, directed gifts at the time of the donation, or in the case of contributions made to the library's Grandmother & CIG Endowment fund which are restricted gifts used only to benefit youth.

Policy: Place the library in potential jeopardy by accepting any funds derived from questionable sources, or connected to any entity or program that might not be in the best interest of the library.

Director's Response: The library is in complete compliance with this mandate and has not accepted any funds from questionable sources.

Policy: Utilize fundraising to supplement regular, day-to-day library operations.

Director's Response: All donated funds are reported annually to the Library Board and a request is made to the board to approve the allocation of gifts and donations funds received in the previous year for specific purposes in the current year.

Policy: Fail to recognize donors, in some special manner, who contribute gifts to the library of \$5,000 or more.

Director's Response: All donors are properly recognized with a letter of thanks following their donation. The library has received several donations of \$5,000 or more and all have been significantly recognized through letters and personal contacts.

Policy: Allow fundraising plan to be executed without board approval.

Director's Response: The Library Director gives updates to the Library Board on the library's future fundraising activities for the year and provides details of everything that will be done in relation to fundraising at the library. All plans are outlined clearly to the Library Board and executed only with board endorsement.

Memo

Scheduling of Mid-Year Meeting With the Library Director

To: Portage District Library Board
From: Jeanne Friedman, Library Board Chair
Date: April 20, 2026

April is the month that a mid-year meeting with the Library Director is scheduled in order for the Library Board to assess current activities and to make sure that things are progressing appropriately and everything is on track with activities to accomplish the Ends and Activity Plan for the 2026 Strategic Plan.

This will be an agenda item for the April 27, 2026 board meeting as a reminder and a mid-year meeting with the Library Director will be scheduled with the Library Board Chair at a future date.

Memo

Report from Library Board Liaison to the Friends of the Portage District Library

To: Portage District Library Board
From: Christy Klien, Library Director
Date: April 22, 2026

Background

Portage District Library Board Trustees Cara Terry and Ken Baker are the Board Co-Liaisons to the Friends of the Library in 2026, and as such, one of them will attend Friends' board meetings and share information about Friends' activities.

There will be an item on the agenda for any Library Board meeting that immediately follows a Friends book sale or board meeting. Since the Friends had a book sale on April 10 and 11, 2026 and their April board meeting on April 20, there will be an item on the agenda for the April 27, 2026 Library Board meeting.

Memo

Regarding Changes to the Programming Policy

To: Portage District Library Board
From: Christy Klien, Library Director
Date: April 23, 2026

Background

Please note under "Program Attendance", the line "At the discretion of library staff, patrons may be moved to the waiting list if they have had three no-shows for advance registration events that have a waiting list to allow other patrons an opportunity to attend." This addition has been requested by the Adult Services Staff and it appears in bold in this copy. Additional comments and discussion may be made at the April 27, 2026 Board Meeting.

Recommendation

I recommend that you approve the changes in the Programming Policy as presented.

Programming Policy

Revised: 04-27-2026

The Portage District Library (“Library”) supports its mission of connecting people to ideas, information, experiences and materials that provide enjoyment, enrich peoples’ lives, and strengthen our community by developing and presenting programs that provide additional opportunities to further the Library’s mission to provide for information, learning, and entertainment. Programming is an integral component of Library service that:

- Expands the Library’s role as a community resource
- Introduces patrons and non-users to Library services
- Provides entertainment
- Provides opportunities for learning
- Expands the visibility of the Library
- Furthers the mission of the Library

I. Program Determination

Ultimate responsibility for programming at the Library rests with the Library Director, who administers under the authority of Portage District Library Board (“Library Board”). The Library Director, in turn, delegates the authority for approved program management to the Program Coordinator, who oversee this responsibility through delegation to designated staff. The Library Director has the discretion to determine which programs the Library shall sponsor or co-sponsor. This policy does not apply to any program that is not conducted or co-sponsored by the Library.

II. Criteria for Programs

Library staff plans and develops programs for the community based on relevance to community interests and issues, popular appeal, the mission of the Library and suitability for general or targeted audiences.

Program presenters are chosen for their expertise and public performance experience.

The Library does not plan programs or classes that are commercial in nature. Although a professional or businessperson may be invited to speak, the purpose of the program is to educate, inform, or entertain and otherwise further the Library’s mission. Programs are not designed for commercial purposes or for the solicitation of business.

III. Co-Sponsorship of Programs

The Library may co-sponsor programs with other persons, agencies, organizations, and institutions. The Library Director has the sole discretion to determine whether to co-sponsor a program according to the criteria set forth in this Programming Policy. If the Library desires to co-sponsor a Library program, these individual or organizational partners must coordinate marketing efforts with the Library’s Program Coordinator. No co-sponsor may use the Library’s name in any marketing material without prior approval of the Library Director. If a person or organization desires to co-sponsor a program, the person or organization shall make such request in writing to the Library Director.

IV. Non-discrimination

The Library does not discriminate in its programs. Library sponsorship or co-sponsorship of a program does not constitute endorsement of the content or the views expressed by the presenter or the participants. Program topics, speakers, and resources are not excluded from programs because of possible controversy, and the Library will strive to offer multiple viewpoints.

V. Program Attendance

Library programs and classes are open to the public; however, due to the nature of certain programs, attendance may be limited. For example, some children's programs may be limited based on age.

Further, attendance may be limited based on the occupancy permitted in the room. When occupancy limits must be established, advanced registration may be required. In the cases where advanced registration is not required, the Library may limit the number of people that may attend any program at the door. Attendance will be determined on a first come, first served basis, either with advanced registration or at the door.

Generally, Library programs are free; however, some classes or programs may require a nominal materials fee or require a ticket to be purchased.

At the discretion of library staff, patrons may be moved to the waiting list if they have had three no-shows for advance registration events that have a waiting list to allow other patrons an opportunity to attend.

VI. Library Staff

Library staff members who present programs or classes do so as part of their regular job and are not hired as outside contractors.

VII. Programming Concerns

The Library welcomes expressions of opinion from patrons concerning programming. If a patron questions a Library program, he/she should first address the concern with the Library Director. Patrons who wish to continue their request for review of Library programs may submit the Request for Reconsideration form to the Library Director. Requests for review of programs will be considered in the same manner as requests for reconsideration of Library materials as outlined in the Library's Material Selection Policy.

VIII. Guidelines for Selling Books, Recordings, Art, or Other Items at Library Programs

Program presenters who are authors or artists are invited to sell and sign books, music, movies, and art following Library programs upon prior approval by the Library Director.

Portage District Library
1st Quarter Report
March 31, 2026

Revenue	Percent of Year Gone -->				25%		
General Ledger Category	1st Qtr Actual	% of Annual Budget	2026 Annual Budget	YTD Actual	YTD Actual+Enc.	YTD % Received	
Total Tax Revenue	\$ 6,223,027	98%	\$ 6,371,934	\$ 6,223,027	\$ 6,223,027	98%	
State Aid Revenue	366,373	93%	395,000	366,373	363,373	92%	
Other Revenue	193,406	64%	300,450	193,406	193,406	64%	
Revenue (To)/from Reserves	1,998,760	100%	1,998,760	1,998,760	1,998,760	100%	
Other Financial Sources	-	0%	962,900	-	-	0%	
Total Revenue	\$ 8,781,565		\$ 10,029,044	\$ 8,781,565	\$ 8,778,565	88%	

Expenses

General Ledger Category	1st Qtr Actual	% of Annual Budget	2026 Annual Budget	YTD Actual	YTD Actual+Enc.	YTD % Spent
Total Salaries & Wages	\$535,084	22%	\$ 2,485,205	\$535,084	\$580,584	23%
Total Fringes & Benefits	194,523	21%	946,907	194,523	216,846	23%
Total Library Materials	205,172	21%	962,865	205,172	378,478	39%
Total Utilities	30,879	18%	173,300	30,879	40,879	24%
Total Buildings	48,792	12%	420,120	48,792	170,742	41%
Total Furnishings & Equipment	0	0%	36,670	0	36,420	99%
Total Supplies	33,056	11%	292,818	33,056	154,264	53%
Total Professional Services	95,510	16%	585,010	95,510	271,912	46%
Total Other Charges	175,963	32%	545,787	175,693	291,055	53%
Other Financial Uses	0	0%	962,900	0	0	0%
TOTAL OPER. EXPENSES	\$ 1,318,979		\$ 7,411,582	\$ 1,318,708	\$ 2,141,180	29%
TOTAL CAPITAL PROJECTS	\$ 2,414	0%	\$ 2,617,461	\$ 2,414	\$ 897,827	34%
TOTAL EXPENSES	\$ 1,321,392	13%	\$ 10,029,044	\$ 1,321,122	\$ 3,039,007	13%

EFFECT ON FUND BALANCE *	\$ 7,460,172		\$ -	\$ 7,460,443	\$ 5,739,558
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Cash Flow Analysis of all money including prior year(s)

12/31/2025 Audited Total cash (Fund Equity*) minus liabilities	\$ 13,744,144
+ 2026 Revenues	8,781,565
- 2026 Operating Expenses	1,318,708
- 2026 Capital Projects	2,414
- General Reserves	857,293
- Building Reserves	50,000
- Benefits Reserve	29,741
- Technology Reserve	111,305
- Patio Feasibility Reserve	4,700
- Personal Property Tax Reserve	805,946
- Building Improvement Reserve	796,325
- Library Endowments	109,063
- Encumbrances	1,717,884
Total available cash as of 3/31/2026 (Fund Balance*)	\$ 16,722,330

* Please Note: Effect on Fund Balance represents the Effect that the current period has on the overall cash position of the Library. This does not represent any individual expense line.

* Fund Equity is defined as the excess of fund assets and resources over fund liabilities. The Fund Balance is the Fund Equity minus any reserves.

Property Taxes - Property Tax collections are slightly behind pace for this time of year. The Library has received all of its payments for collections by taxing jurisdictions through February 28, 2026. This has resulted in a calculated balance of \$149,557. This balance will reflect unpaid real and personal property taxes, along with some smaller special collections (i.e.PILT). In May, Kalamazoo County will reimburse the Library for all unpaid real property taxes. Any unpaid personal property taxes will remain unpaid until collected in future years. In FY2025, Kalamazoo county reimbursed the Library \$117,057. Additionally, the Library collected \$11,339 in PILT. PILT funds are Payment in Lieu of Taxes. These are payments made by the state of Michigan to local units of governments in lieu of property taxes for the land owned by the state and administered by the Department of Natural Resources. After the anticipated reimbursement of real property taxes and PILT payment, it is expected that the Library will have a small balance remaining. A full reconciliation of outstanding amounts will be done with each taxing jurisdiction at that time to determine the nature of the balance.

State Aid Revenue - The Library has received its distribution from the Local Community Stabilization Fund for personal property taxes. The distribution was \$366,373. This amount was \$6,373 more than budgeted. The Library received it's first State Aid payment in April in the amount of \$30,185. This payment makes the Library fully collected on state aid revenue for the year. The Library will receive a second state aid payment later in the year of approximately \$30,000 that will add to the surplus in this category.

Revenue from Reserves - This category is used to track the inflow of funds from the various Reserve accounts, as well as from Unassigned Fund Balance. As part of the Library's FY2026 budget, the library will maintain 13% of its budget in its General Reserve. In doing so, the General Reserve from the prior year will be increased by \$58,346 in FY2026. Funds have been added to the FY2026 budget for the following items: prior year encumbrances (\$2,056,156); restricted donations received in FY2025 (\$24,950).

Other Revenue - Other Revenue appears well ahead of pace for this time of year. Interest income will be collected throughout the year as interest is earned. Revenue from interest in the 1st quarter is 75% of the annual budget. Fines and Fees are slightly ahead of pace for the year. The Library does not budget for donations, but instead chooses to request budget amendments when they are received and needed for use. The Library has received approximately \$12,800 of donations and grants during the year that it has not requested budget amendments in order to spend. Penal Fines are budgeted at \$50,000, but will not be collected until July. The Library is anticipating a distribution from the Michigan Municipal Risk Management Authority (MMRMA) for building insurance premiums. If there is to be a distribution, the amount will not be known until later in the year.

Other Financing Sources/Uses - The Library pays its debt obligation out of its Debt Service Fund, and not the General Fund that is used for the vast majority of Library activity. Therefore, this line represents a transfer of funds from the General Fund to the Debt Service Fund to service the debt payment. Debt payments are due on May 1 and November 1. The May 1st debt payment is scheduled to be paid by ACH on April 25, 2026 in the amount of \$925,850.

Salaries & Wages - Salaries & Wages are slightly below pace for this time of year. The Library is close to fully staffed, but does currently have a few part-time positions open in the Circulation Department and in the Makerspace. The current plan is to fill one of those positions with a permanent hire and the other with temporary help for the summer, while the Library analyzes its need for these positions.

Fringes & Benefits - Fringes & Benefits are less than 25% expended as of March 31, 2026. This is due to two (2) employees opting out of the Library's insurance plan and picking up a spouse's insurance plan. Based on this scenario, there should be a surplus of funds at the end of the year.

Library Materials - This category shows that it is ahead of pace for this time of year. This is due to a large amount of encumbered funds(\$148,780) coming into FY2026 from the prior year. The effect of those encumbrances will ease as the year progresses.

Portage District Library
1st Quarter Report
March 31, 2026

Utilities - Utilities are under budget for this time of year. Gas & Electric comprise the largest expenditure line in this category and expenditures have been below budget. Through the first quarter of FY2025, gas & electric expenses are approximately \$9,000 below the budgeted amount. The cause of this may be due to a mostly warmer winter weather, except for February, resulting in less usage. It is too early to determine if this category will be under budget at year-end. Global events will impact the cost of energy to the Library as the year goes on.

Building - Year-to-date actual and encumbrances are greater than the 25% target. The Library has set up encumbrances for anticipated building and equipment maintenance for the year. Therefore, there is a large proportion of the budget accounted for at this time.

Furnishings & Equipment - The library did not budget for new expenditures for FY2026. It has since increased that budget by \$36,536 for FY2025 encumbrances and \$250 for items approved as part of the 2025 donations for designated request. All but the \$250 donation have been purchased or encumbered. Funds in this line should be spent before the end of the year.

Supplies - The supply category is over budget for this time of year. This is due to several accounts with large encumbrances from FY2025. The majority of accounts in this category are used on an as needed basis. The library has tried to adopt a very conservative approach to its spending for lines such as supplies.

Professional Services - This category is higher than the 25% target for several reasons. The Library has several lines that have projects for which funds have been brought forward in the form of encumbrances from FY2025. These projects include: Phase II of the salary & wage study, contracting a fractional HR consultant; various small projects for the Library's attorneys, as well as annual subscriptions to online software that are expensed early in the year. There are no concerns at this point with any lines within this category being over budget for the year.

Other Charges - This category is ahead of pace for this time of year. Lines in this category include programming, training and maintenance and support for the various hardware and software located throughout the Library. There are several contracts that begin in January or February of the year. Therefore, a significant portion of the budget is used early in the year for these annual contracts.

Capital Projects - This category is slightly ahead of pace for this time of year due to the encumbrance from FY2025. Projects designated under the Technology Plan typically begin in the 4th quarter. The Library will make its debt payments in May and October. These payments represent slightly less than half the budget for this category.



Portage District
LIBRARY

STRATEGIC PLAN 2023-2026

FIRST QUARTER UPDATE 2026



Strengthening the Community

We facilitate community members learning, creating, and bridging divides.

GOAL 1: Enrich the lives of community members by providing innovative and ample outlets for expressing creativity.

Activities:

1.1.1 Invest in cutting edge technology in the Makerspace, Creation Station, and Library of Things service areas to provide learning opportunities for patrons.

UPDATE: Coming soon to the Library of Things are bicycle accessories to encourage people to pedal for their health. We will be offering a 30-piece bike repair tool kit for Mountain, Road, and Park bikes, as well as a Garmin Edge 1050, a premium bicycle computer. It offers detailed maps and performance stats, so the rider can easily find complex routes with enhanced visibility and customize their data views for an optimal riding experience.

1.1.2 Create opportunities for patrons' creative work to be displayed and highlighted at the library.

UPDATE: In January, the Portage Public Schools shared their artwork in the Atrium gallery.

-In February and March, Sarah Nott's mixed-media pieces were displayed in the Atrium gallery.

GOAL 2: Build and expand vibrant partner plans with organizations working towards aligned goals.

Activities:

1.2.1 Partner with community organizations to host programming.

UPDATE: We contacted 35 local organizations, all of which expressed interest in continuing or starting partnerships with us. We held programming events with 22 of those organizations. Several of those contacts are pending, while 7 of them have made plans for future programming or events with the library.

1.2.2 Consult with existing and potential community partners about effective ways to meet community needs.

UPDATE: There is no update at this time.

GOAL 3: Implement targeted community engagement campaigns and create routine feedback opportunities for patrons.

Activities:

1.3.1 Prioritize directions for outreach including staff connections and community interest.

UPDATE: The increase in inclement weather was a factor in Youth services and programming this quarter, and will continue to affect how and what we plan. (There were 10 cancelled programs this winter due to weather, for example.) Families are looking for the library to fill a need for both a third place and for entertainment for longer periods of time, and for more days as there were fewer opportunities for outdoor entertainment. The increased demand for program space is a factor as well – last year we were able to have 3 drop-in multi-day events to cover school breaks. This year, we were able to plan one. None of these challenges are insurmountable, but they do inform future planning.

The Adult Services Department has continued to serve communities such as senior living communities when Sara Weyenberg left as Outreach Librarian.

1.3.2 Create a robust feedback system to allow data from multiple sources to be analyzed and shared with the staff and community.

UPDATE: The project associated with this item in the adult department was a cooperation between our Outreach librarian and the Marketing department, and may require a new incumbent for the position to be reported on.

Extraordinary Experiences

We provide exceptional services that lead to delightful and meaningful interactions.

Goal 1: Position the library in unexpected ways in the community.

Activities:

- 2.1.1 **For outreach to under served populations, prioritize access to regular remote circulation of materials and personal connections with Library staff.**

UPDATE: This quarter, Youth Outreach Librarian Andrea Smalley reported 15 outreach opportunities with the Portage Public Schools, and 9 with other organizations.

- 2.1.2 **Prioritize offsite outreach opportunities that target those who have barriers to in-building services.**

UPDATE: Youth Staff Andrea Smalley and Kristy Zeluff made 7 visits to outside preschools this quarter.

Winter is a slow season for offsite programs, but we have prioritized city collaborations for Spring through Fall 2026 in cooperation with the youth department.

Goal 2: Equip staff to provide caring, responsive service to support the information and life-stage needs of community members.

Activities:

- 2.2.1 **Develop and execute training to educate staff on diversity, equity, inclusion, and accessibility (DEIA) principles, ensuring their effective implementation throughout the organization.**

UPDATE: The library renewed its subscription to Empathy Studios, an online training service for staff to take focused training to enhance their skills and knowledge.

- 2.2.2 **Conduct staff trainings to enhance their skills in providing empathetic support and social emotional assistance to patrons.**

UPDATE: The library renewed its subscription to Empathy Studios, an online training service for staff to take focused training to enhance their skills and knowledge.

Goal 3: Celebrate and strengthen the community's social fabric by incorporating relationship building opportunities in library programs and throughout the building.

Activities:

2.3.1 Host more programs that foster interaction and community.

UPDATE: The adult department hosted several programs that created connections in the community.

During the first quarter, we connected to the community in the following ways:

- An Evening with Brendan Slocumb
- Yoga with Apral on multiple occasions
- Speed Friending
- Educate 2 Caffeinate with Dr. Gary Marquardt
- Four-week nutrition class with Gretchen Kauth
- Three-series presentation of historical swordsmanship with Jerry Berg
- Speed gaming
- Pub(lic) Trivia: Sports
- Tai Chi and Chinese Calligraphy with the Haenicke Institute of WMU
- Pam Chapman and the messages in quilts
- Rebecca Rupe from the Gun Lake Tribe
- Cultivating Self with Dr. Stephen Covell
- Six book groups were hosted: Light Lunch and Literature and International Mystery.
- Portage District Library helped facilitate two in-person and Zoom live streamed events and one in-person only event with Kalamazoo Area Wild Ones.

2.3.2 Investigate framework that helps people share differing viewpoints in a safe space.

UPDATE: Documentary and Doughnuts continues to be popular, with 24 attendees in January, and 10 and 15 attendees in the following months. Participant enthusiasm stays high.

Investing in the Future

We help the community evolve and grow.

Goal 1: Maintain high-quality staff by investing in hiring, orientation, and retention practices that are equitable and inclusive.

Activities:

3.1.1 Review staff wages and adjust based on the results of the compensation study.

UPDATE: Staff wages are scheduled to be reviewed at the end of 2026 and adjusted to align with the compensation study plan that was created by ElementOne.

3.1.2 Create a standardized orientation and cross training.

UPDATE: There is no update at this time.

3.1.3 Implement robust internal communication procedures.

UPDATE: The notes from the Administrative Team meetings, weekly staff meetings, and departmental meetings are shared with the entire staff through email. Departments use Teams to provide frequent internal department updates.

3.1.4 Create a performance evaluation system that encourages open communication and clear expectations.

UPDATE: We are continuing to work with our HR Collaborative HR generalist, Stefon Hemphill and a team from ElementOne on reviewing and revising staff job descriptions and are fine-tuning the performance evaluation system that ties evaluations directly to staff job descriptions and expectations.

Goal 2: Provide technology access and learning opportunities for community members so they are confident navigating an evolving digital world.

Activities:

3.2.1 Offer a robust, cutting-edge catalog for patrons to access our full collections including Library of Things, e-resources, and databases.

UPDATE: There is no update at this time.

3.2.2 Create promotional campaigns to highlight the library's services.

UPDATE: There is no update at this time.

3.2.3 Invest in more device offerings.

UPDATE: Next quarter, we will be offering a 61-note Yamaha keyboard, a Mah-Jongg set, and a premium chess board with metal pieces. We have added a second metal detector to meet patron demand.

Pocketalk Voice Translator - Pocketalk unlocks new possibilities as the only two-way translation device, enabling authentic, accurate communication across 92+ languages and over 170 countries.

AI Voice Recorder - This M5 AI Voice Recorder features advanced transcription capabilities for fast and accurate offline or online transcription in 134 languages. Based on the development of ChatGPT-4o, users can create summaries, meeting notes, and to-do lists to improve daily productivity.

Goal 3: Find ways to be welcoming and inclusive through collections, programs, displays, messaging, and facilities.

3.3.1 Create successful collection display practices.

UPDATE: The Adult Services CSAs and Circulation employees rotate book and information displays once a month. This quarter's displays have been:

Jan – Slavery and human trafficking awareness, Braille awareness, Making a home, Spy romance, Manga one-shots.

Feb – American heart month, Black memoirs and civil rights, Lunar New Year/Black lives matter, Celebrating black authors in Sci-Fi and Fantasy, Romance Manga, and African American Authors in graphic novels.

Mar – Book with movie adaptations, Oceans and creatures, Garden Prep/Banned books, Books with Gold in the title, Adaptations Galore and drawing books.

Our Adult DVD collection now has a dedicated display that will feature monthly collection highlights. The display has already proven popular and has required consistent restocking.

3.3.2 Improve access to and visibility of collections/services that meet local needs and interests.

Prioritize currency, responsiveness, local information, and ties to library and local events.

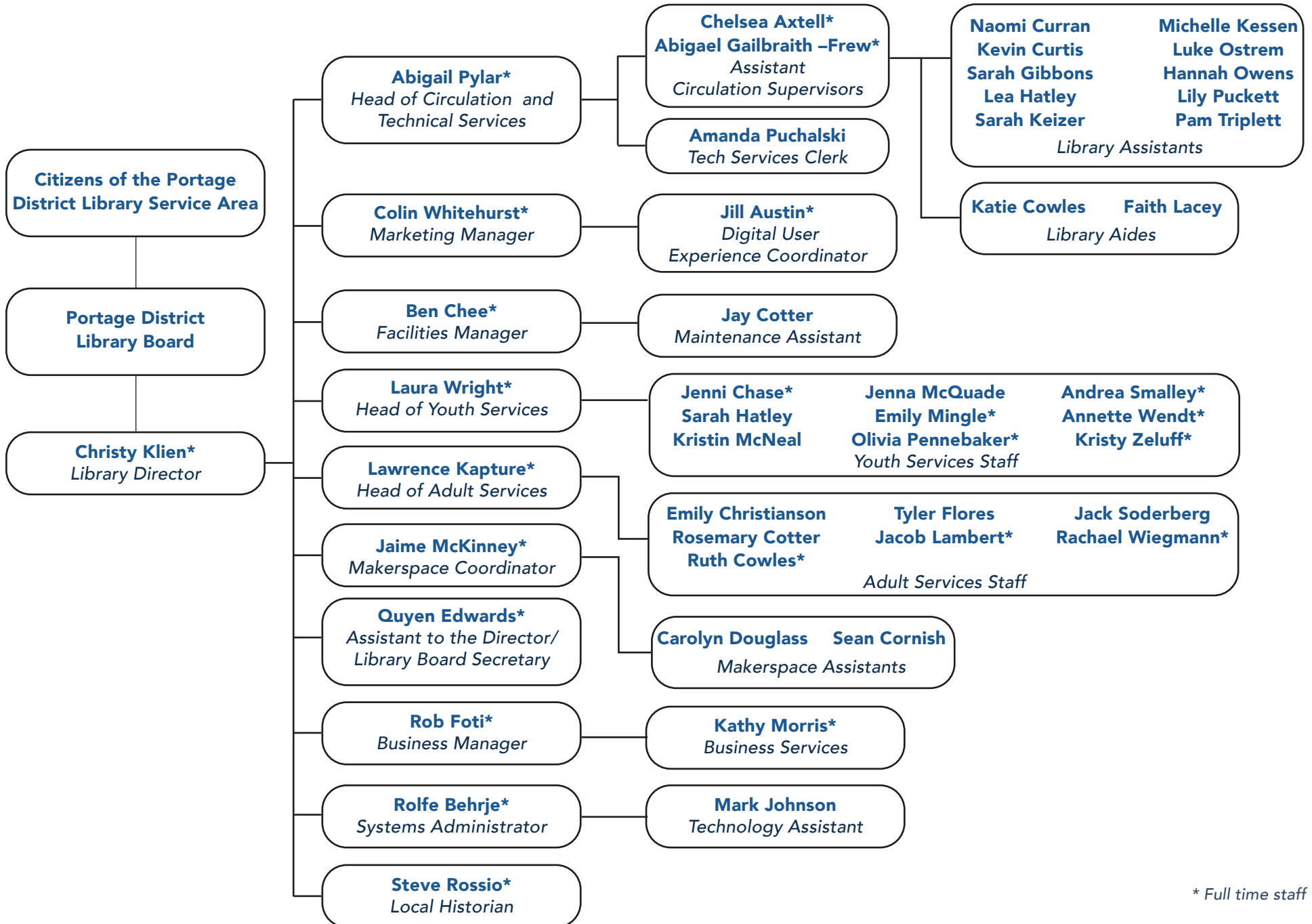
UPDATE: Youth Staff Kristin McNeal has taken over the coordination of the Youth Department's Book Display Calendar. All displays are changed out multiple times each quarter, with a combination of holiday, population/group celebrations, local and current interest, Windows/Mirrors theme, and Staff Favorites.

The Adult World Language collection has been significantly overhauled and updated. The collection is now focusing more narrowly on languages of local interest and provides a greater depth of material and more modern resources for these languages. The collection is also in the process of moving from its current location in the 400s of non-fiction to the World Languages collection where language learning material will be co-located with original literature in that language.

3.3.3 Prioritize accommodating people with disabilities when designing or selecting offerings

UPDATE: There is no update at this time.

Staff Organizational Chart



* Full time staff