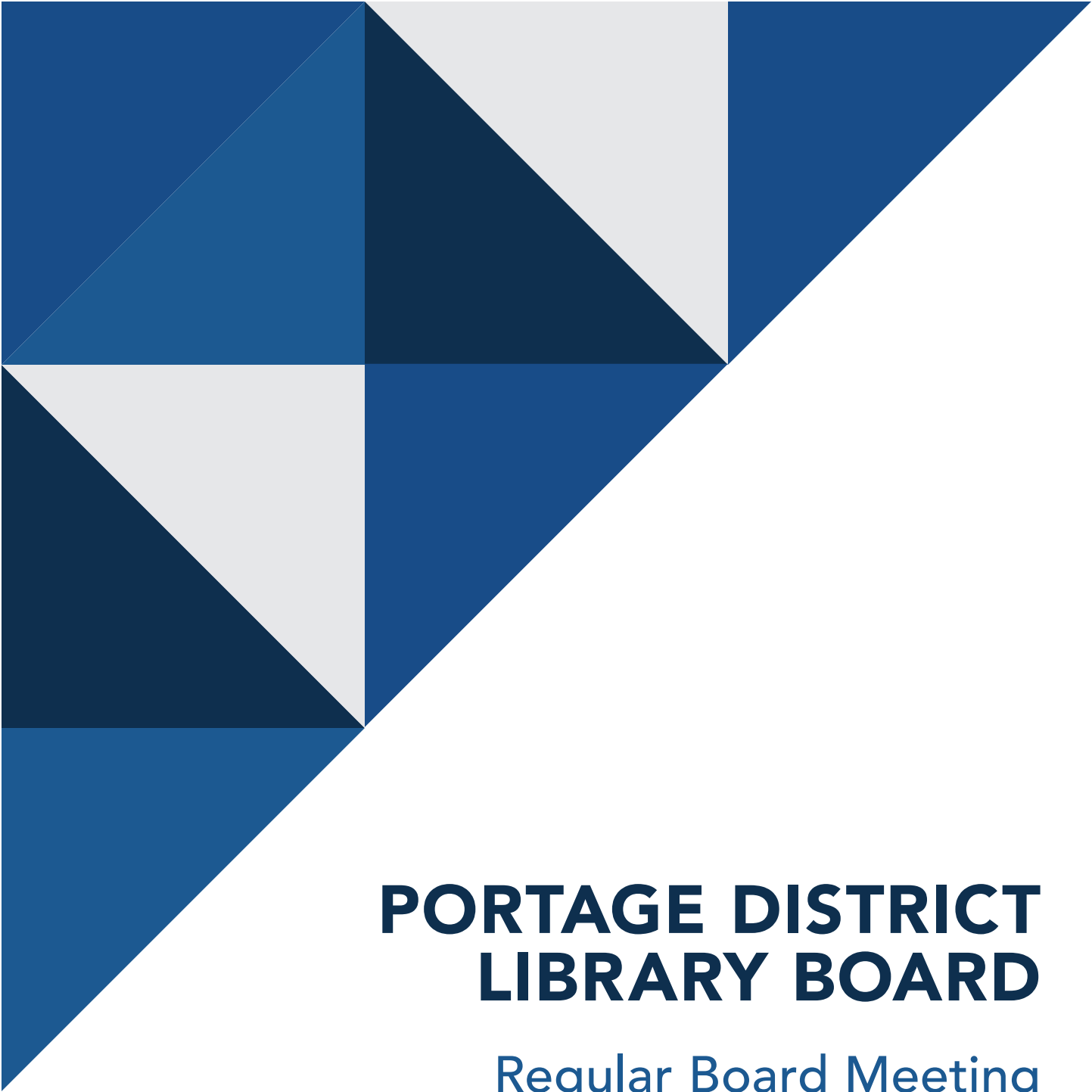




PORTAGE DISTRICT LIBRARY BOARD

Regular Board Meeting
July 27, 2026

300 LIBRARY LANE, PORTAGE, MICHIGAN 49002





NOTICE OF REGULAR MEETING

PORTAGE DISTRICT LIBRARY BOARD

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

The Library Board of the Portage District Library will hold a regular meeting on Monday, July 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: July 23, 2026

Quyen Edwards
Library Board Secretary

Portage District Library
300 Library Lane
Portage, MI 49002

AGENDA

July 27, 2026

I. Start of Meeting

II. Roll Call

III. Comments or Requests from the Public, Board Members, or Library Staff (10 minutes)

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 July 27, 2026 (1 minute) (Vote)

V. Consent Agenda (5 minutes) (Vote)

- A. Minutes of the regular meeting held on June 22, 2026 (Info) Pg.6-10
- B. June 2026 Narrative (Info) Pg.11-15
- C. Financial Condition for June 2026 (Info) Pg. 16-17
- D. Statistical Report for June 2026 (Info) Pg. 18-19
- E. MLA Advocacy Update (Info) Pg.20-22
- F. August 2026 Program Calendar (Info) Pg.23
- G. 2nd Quarter Financial Report (Info) Pg. 24-26
- H. Monitoring Report on the Executive Limitation Policy for Minutes and Records Retention (Info) Pg.27-28

VI. Governance (20 minutes)

- A. Discussion of Internet Filtering required for E-Rate funding and Approval of the Internet Policy. (VOTE) Pg. 35-41

VII. Ends Development (30 minutes)

- A. Second Quarter 2026 Strategic Plan Report (Info) Pg. 42-48
- B. Presentation of the library's 3-Year Technology Plan (2027-2029) (Info) Separate document
- C. Final Review and approval of the preliminary FY 2027 Budget and Millage Rate for Public Inspection prior to Public Hearing at the August 24, 2026 (VOTE) Separate document

VIII. Library Director's Reports (20 minutes)

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

IX. Process Evaluation (5 minutes total)

- A. Suggestions for Agenda Items to be included on the August 24, 2026 Board Meeting
 - 1. Minutes of the Regular Meeting held on July 27, 2026
 - 2. Public Hearing on the Proposed FY 2027 Budget and Formal Resolution to Adopt the FY 2027 Budget and Set the Amount of Millage Rate to be Levied for the Library
 - 3. Monitoring Report for Executive Limitation on Compensation and Benefits for Library Employees
 - 4. Monitoring Report on Executive Limitation for Treatment of Staff
- B. Miscellaneous Items

X. Adjournment

MINUTES

From the June 22, 2026
Regular Board Meeting

I. Start of Meeting

II. Roll Call

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

Library Staff Present: Library Director Christy Klien, Rolfe Behrje, Ben Chee, Quyen Edwards, Rob Foti, Lawrence Kapture, Jamie McKinney, Abby Pylar, Steve Rossio, and Colin Whitehurst

Library Staff Absent: Laura Wright

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

Library Board Chair Jeanne Friedman welcomed everyone to the June 22, 2026 Library Board Meeting. She asked if anyone present had any comments and there was one.

- A. Comment from Trustee Baker - Trustee Baker shared a positive review of the latest book by local author Lindsay MacMillan, *The Anti-Marriage Pact: A Novel*.

IV. Adoption of the Agenda for the Regular Meeting of June 22, 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 VanderVries and supported by Trustee Baker that the Library Board adopt the agenda for the regular meeting of June 22, 2026. Vote: 7 -Yes, 0-No. Motion carried.

V. Audit Presentation

A. Presentation of Audit Report for FY 2025 by Rehmann Robson

The audit opinion from Rehmann Robson was an unmodified, clean audit. The Rehmann representative also said that it was a pleasure to work with Business Manager Rob Foti and the library staff. He went over the provided handouts including "Areas of Interest" and "Financial Highlights". He commented positively on the increase of two million dollars in the General Fund Balance and that the library has prioritized funding the "Unassigned Fund Balance" to ensure the library is prepared in the case of loss of revenue. Business Manager Rob Foti discussed the audit provided page of comments and said that he would be following up on their recommendations.

VI. Consent Agenda

Library Board Chair Friedman asked if there were any changes needed to the consent agenda for the June 22, 2026 board meeting before its adoption and there were none.

- A. Minutes of the regular meeting held on May 18, 2026
- B. May 2026 Director's Report
- C. Spotlight on Outreach

- D. Budget Amendment for Restricted Donation
- E. Financial Condition for May 2026
- F. Statistical Report for May 2026
- G. July 2026 Program Calendar
- H. Staff Development Day

MOTION: It was moved by Trustee VanderVries and supported by Trustee Behr that the Library Board adopt the agenda for the regular meeting of June 22, 2026. Vote 7 - Yes, 0 - No. Motion carried.

VII. Governance

A. Board Retreat

Library Director Klien and Board Chair Friedman met for Klien's midyear review. They discussed using this year's Board retreat to discuss the library's strategic plan which is set to expire at the end of 2026. Trustees could use that time to make modifications and/or discuss if they would like to write a new strategic plan. Friedman has requested feedback from the staff regarding moving forward with changes, continue the same plan, or remove certain project. The library director and trustees agreed that we want the staff to have a document that they can use.

Board and administrative staff will meet in the Fall.

B. Revise Heritage Room Policy

Library Director Klien referred to the memo and said that Local Historian Steve Rossio was requesting some minor changes to the Heritage Room Policy.

MOTION: It was moved by Trustee Vance and supported by Trustee Baker that the Library Board approve the recommended changes to the Heritage Room Policy. Vote 7-Yes, 0-No. Motion carried.

C. Friends of the Portage District Library Update

Board Liaisons Terry and Baker reported that the Friends had \$3,500 in sales at their June book sale and that they have more members this year than last year. The Friends are discussing the possibility of moving the June sale to a different week in 2027 because there were so many competing events that first week.

D. Memo - Conflict of Interest

Library Director Klien reviewed the memo regarding the purchase of native plants for the library's native plant garden designed by Mike Weis, of Dropseed Native Gardens and Ecological Services. She said that we wanted to disclose a possible conflict of interest due to the fact that library staff member Quyen Edwards is co-owner of the Portage-based Painted Lady Greenhouse.

Trustees said that as long as prices were comparable and the business provided plants in the quantities and varieties required, that they prefer the library use local vendors.

MOTION: It was moved by Trustee VanderVries and supported by Trustee Terry that the Library Board approve using Painted Lady Greenhouse as a vendor. Vote 7-Yes, 0-No. Motion carried.

VIII. Ends Development

A. Presentation of the Preliminary FY 2027 Budget for the Portage District Library

Business Manager Foti said that this document has been produced after many discussions with staff for recommendations and budget line changes both increases and decreases. Foti said he was pleased this budget was able to accommodate all budgeting requests for 2027.

On the revenue side, the library is projecting an increase of 3.44%.

Foti said the library would experience another small Headlee Rollback. While it doesn't amount to a huge revenue loss at this time, it is a trend that is continuing and we should keep an eye on it.

Library supervisors have sked for more staffing in 2027 including another part-time position in circulation as well as another full time librarian in Youth Services. Any full time positions require an increased budget for benefits.

Library digital materials will see increase as ebook usage continues to grow.

Budgeting lines that will be decreased include supplies and Administrative Services which are used on a 'as needed' basis. The library is also increasing the budget for utilities to ensure we are protecting ourselves against energy increases

Debt payment funded and the amount should remain consistent over the next three years.

Foti reminded trustees that this is a preliminary budget. He encouraged them to think about what has been recommended and requests for changes can be made next month.

Trsutee VanderVries asked if PPT (Personal Porperty Tax) reimbursement is included in the budget, and Business Manager Foti responded that it was.

Trustees had questions about technology budget - IT Manager Behrje said that projects are rolling over 4 years - public computers, private computers, self checkouts, and hardware.

Trsutee Behr has questions regarding the decrease on physical books in Youth Services. Klien repoded that this is due to limited space in the Youth Area for additional new materials and that they don't need as large a budget for Youth Library of Things now that the collection has been established.

Trustees asked about the Cataloging and Processing decrease. Head of Circulation and Technical Services Pylar responed that in the past, the budget had included fees for SkyRiver and now she is using BlueCloud which is already paid for through SirsiDynix.

IX. Library Director's Reports

A. Final remarks by Library Director for the June 22, 2026 Library Board Meeting.

The Annual Lego City display in the meeting rooms is coming up. Sign up if you are interested in helping to monitoring the room and see the community enjoy the display.

It is an Election Year. Reminder that the trustee filing deadline is August 11, 2026 at the Kalamazoo County Clerk. Trustees VanderVries, Terry, and Friedman's terms are expiring.

Local Historian Steve Rossio reviewed the events planned for the country's 250th Anniversary partnering with Portage Historic District Commission: a Concert at Overlander Bandshell, Large Photos from John Todd collection on display, and the creation of a time capsule. Rossio is also participating in the reading of the Declaration of Independance on the 4th of July and a July 11th - Revolutionary War Encampment, reinactors, tours of the Portage City Center.

X. Process Evaluation

A. Suggestions for Agenda Items to be included on the June 22, 2026 Board Meeting

1. Minutes of the Regular Meeting held on May 17, 2026
2. Audit Presentation by Rehman Robson
3. Discussions about Plans for 2026 Library Board Retreat
4. Review of Heritage Room Policy
5. Review of Creation Station/Makerspace Policy
6. Presentation of Proposed Library Operating Budget for FY2027

B. Miscellaneous

Trustee VanderVries will not be attending the July Meeting.

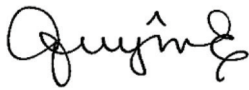
XI. Adjournment

Library Board Friedman said if there was no further business to be considered, that she would accept a motion to adjourn the regular board meeting of June 22, 2026.

MOTION: It was moved by Trustee Terry and supported by Trustee Baker that the Library Board adjourn the regular meeting of June 22, 2026. Vote 4-Yes, 0-No, 3-Absent. Motion carried.

DISPOSITION: The regular board meeting of June 22, 2026 was adjourned at 7:35 PM.

Recorded and Transcribed by,

A handwritten signature in black ink, appearing to read "Quyen Edwards". The signature is fluid and cursive, with the first name "Quyen" being more prominent than the last name "Edwards".

Quyen Edwards
Library Board Secretary

Director's Report

July 2026

Adult Services

Adult Summer Reading started smoothly on June 1st . As of the end of June, adults have earned 2,363 badges that convert to tickets for drawings. Ten \$15 gift cards are drawn every week to various businesses in Portage. More importantly, there have been 2,371 books logged as read. With this kind of start, July Summer Reading is looking promising.

On Thursday, June 4th, Adult Services Librarian Jacob Lambert hosted PDL's first Professional Headshots session with local photographer Haley Labian. The program was well attended with a waitlist of over 30 people. The results were extremely popular with patrons with one patron stating: "I appreciate all you did to help pull off this first pilot project. Hope you'll do it again for other members of our community."

On Wednesday, June 24th, Adult Services Librarian, Rachael Wiegmann, hosted Enda Reilly at the Portage District Library. The original concert was scheduled outdoors, but due to the threat of rain, Rachael decided to move it inside. Mr. Reilly is originally from Dublin, Ireland and performed both original and traditional Irish songs. In addition to the music, Mr. Reilly spoke about Ireland's rich culture and shared stories. This event had forty-three attendees. Here is a comment from an attendee: "Really good, very talented [sic] enjoyed [sic] the song with the drum [sic] the stories were great!"



Additionally on June 24th, the Kalamazoo County Sheriff's office returned to PDL to educate our patrons on scams and frauds. Attendance for this program exceeded 50 patrons. Captain Baker expertly described the current state of scams and frauds in our community and offered strategies to combat them. Patrons were exceptionally positive in their reviews, even those who attended prior years.

Youth Services

Summer Reading Halfway Mark – Youth and Teen

- 1,467 Readers Registered
- 25,422 Days Recorded
- 822 Books Rewarded

This year, teen volunteers are assisting Youth Staff at the Summer Reading Table. During the month of June, 23 teen volunteers gave a total of 197 hours of their time to the library, helping families sign up and participate in the Summer Reading Program. Thank you, teens! This has been enormously helpful to Youth Staff during this busy season.

Youth Outreach Librarian Andrea Smalley and Youth Staff Kristin McNeal and Sarah Hatley visited all 8th grade ELA students this month. They provided enrichment activities and library cards to all attendees.

Youth Staff Emily Mingle hosted a Mini-Mini-Golf event, with 57 kids and adults participating. Everyone had the chance to make their own mini-mini-golf hole and then test it out using pompom golf balls and mini-mini golf putters. Obstacles included tunnels, sandpits, ponds, and bridges with each kid bringing their own creativity to make a very enjoyable mini-mini- golf course!



Teen Services Librarian Olivia Pennebaker and Youth Staff Kristin McNeal hosted the Teen Karaoke Dance Battle, an event imagined into existence by the Teen Advisory Group. Teens competed to win Weirdest Dance, Choreo Baddie, Singer Look/Sound Alike, Future Superstar, and Fave Performance. The winners were awarded paper crowns designed by the Teen Advisory Group. In addition to being a lot of fun, this program gave teens an opportunity to show off their skills, overcome nerves, and work together.

Youth Outreach Librarian Andrea Smalley, Adult Services Staff Tyler Flores, and Maker Space Staff Sean Cornish hosted a booth at the annual Pride event. They distributed Library information and promotional items. This event provides an excellent opportunity for community connection.



LEGO City – LEGO City ran from Monday, June 29th – Friday, July 3rd. 2,351 people visited the City, and 371 children created and displayed a LEGO build of their own in our “Build It” room. Thank you to our Board Members, Staff, and volunteers for monitoring the room during this popular all-ages program!

Makerspace

The Makerspace has had a table upgrade for all our equipment! The 3d printers, laser engravers, embroidery and Cricut stations are now home to Uline work tables that are very heavy duty and can handle the weight and work of our machines.

Check out the Makerspace Library! A collection of STEAM (science, technology, engineering, arts, and math) and narrative nonfiction books that will live in the Makerspace for patron use connecting to our machines and creative pursuits.



Circulation

During the month of June, the circulation department sent out 3,246 SMS messages regarding holds, bills, overdue materials, and account renewals. We had 840 students utilize their PASS cards. The circulation department also repaired \$1,600.96 worth of materials.

Personnel

The library is conducting second interviews with two candidates for the Adult Librarian-Outreach position. An offer should be extended by the end of July. The Library hired two new Library Aides in the Circulation Department. Library Director Christy Klien and Business Manager Rob Foti are working with the library's part-time HR consultant to update a few employee handbook policies. The goal is to have all changes finalized by the end of August. A job posting for a new Makerspace Programming Assistant will be up by the end of July with the hope of having that position filled by the end of August. This is a new position that will work in the Makerspace with an emphasis on Youth programming and events. There are several finance projects that will be worked on in the July-September time frame. These include new processes to invoice payments and credit cards. More information will follow as the project progresses.

Facilities

During the month of July, several important facilities maintenance and operational activities were completed to support the continued safety, functionality, and appearance of the library. Routine pest control services were performed as scheduled to maintain a healthy and comfortable environment for patrons and staff. Allied Mechanical Services completed the repair of the fire suppression system backflow device, ensuring the system remains in proper working order and compliant with applicable safety requirements. Monthly water treatment services were also completed to support the efficient operation and longevity of the building's mechanical systems.

In addition to these preventive maintenance efforts, the quarterly deep cleaning of all public and staff restrooms was successfully completed. This service included a comprehensive cleaning of surfaces, fixtures, and hard-to-reach areas beyond the scope of routine custodial work. Furthermore, all hard-surface flooring throughout the facility underwent professional cleaning, enhancing both the appearance of the building and the long-term preservation of flooring materials.

Planning and preliminary work have also begun on the study room door upgrade project. This initiative is currently in the early stages of development and evaluation, with efforts focused on identifying the most effective solutions to improve security, accessibility, and overall user experience. Additional updates regarding project scope, scheduling, and implementation will be provided as the project progresses.

IT Department

In June 2026, the IT department completed the rollout of new computers for public access usage. This project involved zero downtime as the computers are being replaced mornings before the library opens for public usage. The IT Department is finishing Creation Station computers' beta images. The IT department deployed its Apple Studio replacement and will soon replace the Windows workstation. The circulating laptops and pilot in-house PAC iPads images are being completed and the reset process for the iPads is being tested.

The IT department is now using DeepFreeze Cloud to manage its public access computers. Both Deepfreeze Cloud and JAMF MDM are making the IT department more efficient by providing a reliable, secure and private computing experience for library users. Additionally, maintenance of the computer software, patching and updates are scheduled and completed regularly with much less manual intervention.

The IT department has remediated most of the issues with one of its core file servers and has scheduled July for its server migration. All outstanding issues and services have been selected and implemented including SMTP relaying, FTP services, DNS services, DHCP services and file/print services. The final steps will be completed on July 23rd.

The IT Department continues to work on a network redesign to better multi-path its fiber connections to provide better redundancy in the case of down services. Aunalytics is working to provide a test environment to ensure that there is no service disruption due to the changes planned.

The IT Department continues to maintain the firmware for its network devices including its firewalls, switches and access points with regular security and enhancement.

The IT Department continues to monitor and test its LMS as SirsiDynix moves its infrastructure to Azure. In July Enterprise, SIP and Web Services production instances will be moved to Azure and in August Symphony will be moved to Azure. The IT Department is finishing its transition of its website server to a new platform.

Financial Condition Report

June 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 \$9,353,604
Expenditures \$3,413,403

Fund	5/31/2026	Changes	6/30/2026
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	8,952,193	-	8,952,193

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

June 2026

Month Statistics				YTD Statistics		
	Jun-26	Jun-25	CHANGE	2026	2025	CHANGE
Circulation/Collections						
Total Library Circulation	88,118	84,560	4.21%	496,043	491,361	0.95%
Adult - Books	17,232	16,738	2.95%	98,513	100,633	-2.11%
Adult - A/V	2,727	2,847	-4.21%	17,033	17,196	-0.95%
Youth - Books	35,902	32,888	9.16%	185,254	188,510	-1.73%
Youth - A/V	3,523	3,201	10.06%	17,227	16,445	4.76%
Hot Picks	684	734	-6.81%	4,453	3,854	15.54%
E-Material	26,529	26,520	0.03%	163,401	154,565	5.72%
ILL - PDL Requests	852	1,020	-16.47%	6,166	6,371	-3.22%
ILL - Other Lib. Requests	669	612	9.31%	3,996	3,787	5.52%
Self-Checkout Percentage	60.40%	60.77%		53.75%	53.14%	
Total Library Collection	176,291	179,745	-1.92%			
Adult - Books	69,927	71,580	-2.31%			
Adult - A/V	7,806	9,291	-15.98%			
Youth - Books	90,883	88,930	2.20%			
Youth - A/V	6,117	7,354	-16.82%			
Hot Picks	1,558	2,590	-39.85%			
Net Acquisitions	1,536	1,322	16.19%	5,183	7,497	-30.87%
Purchased - Books	2,445	1,825	33.97%	14,388	15,269	-5.77%
Purchased - A/V	208	147	41.50%	1,067	836	27.63%
Donated - Books	0	3	-100.00%	0	4	-100.00%
Donated - A/V	0	2	-100.00%	0	3	-100.00%
Material Discarded	(1,117)	(655)	-70.53%	(10,272)	(8,615)	-19.23%
Total In-House Usage*	0	0	n/a	0	0	n/a
In-House Periodical Usage	n/a	n/a	n/a	0	0	n/a
In-House Book Usage	n/a	n/a	n/a	0	0	n/a
Patrons						
Total Patrons	34,959	34,222	2.15%			
Adult	18,272	17,646	3.55%			
Youth	1,819	2,026	-10.22%			
Non-Resident	271	247	9.72%			
Reciprocal	4,206	3,733	12.67%			
Internet User	1	412	-99.76%			
PASS Users	10,332	10,097	2.33%			
Professional	58	61	-4.92%			
Net Patrons	85	89	-4.49%	526	946	-44.40%
Adult	209	205	1.95%	1,105	1,185	-6.75%
Youth	22	28	-21.43%	70	72	-2.78%
Non-Resident	2	5	-60.00%	12	20	-40.00%
Reciprocal	60	88	-31.82%	389	441	-11.79%
Internet User	0	0	0.00%	0	72	-100.00%
PASS Users	4	2	100.00%	52	71	-26.76%
Professional	1	1	0.00%	2	3	-33.33%
Patrons Removed	(213)	(240)	-100.00%	(1,104)	(918)	-20.26%

Statistical Report

June 2026

	Month Statistics			YTD Statistics		
	Jun-26	Jun-25	CHANGE	2026	2025	CHANGE
Library Building Usage						
Total Meeting Room Usage	877	769	14.04%	5,127	5,213	-1.65%
Internal/Collaboration	113	124	-8.87%	732	730	0.27%
External/Outside Usage	764	645	18.45%	4,395	4,483	-1.96%
Total Program Audience	5,517	5,112	7.92%	19,095	21,734	-12.14%
Adult	772	1,396	-44.70%	4,618	7,147	-35.39%
Youth	4,705	3,659	28.59%	13,593	13,725	-0.96%
Heritage Room	40	57	-29.82%	884	862	2.55%
Total Number of Programs	65	75	-13.33%	575	585	-1.71%
Adult	42	49	-14.29%	285	326	-12.58%
Youth	21	25	-16.00%	219	245	-10.61%
Heritage Room	2	1	100.00%	71	14	407.14%
Total Volunteer Hours	99	161	-38.51%	849	1,143	-25.72%
Adult	48	48	0.00%	316	403	-21.59%
Youth	0	40	-100.00%	143	305	-53.11%
Technical	9	7	28.57%	60	74	-18.92%
Circulation	10	34	-70.59%	138	167	-17.37%
Administration	32	32	0.00%	192	194	-1.03%
Community Service	0	0	0.00%	0	0	0.00%
Total Front Door Traffic	19,008	19,321	-1.62%	117,982	119,337	-1.14%
Total Youth Services Traffic	13,998	14,113	-0.81%	89,748	90,299	-0.61%
Total Business Center Traffic	0	0	0.00%	0	0	0.00%
Information Access/Reference/Research						
Total Reference Transactions	8,550	9,043	-5.45%	46,286	46,124	0.35%
Adult Phone	730	486	50.21%	3,938	3,515	12.03%
Adult Ready Reference	1,347	1,700	-20.76%	6,482	10,108	-35.87%
Adult Reference	245	205	19.51%	697	1,448	-51.86%
Youth Phone	93	114	-18.42%	500	522	-4.21%
Youth Ready Reference	2,960	3,437	-13.88%	15,889	17,639	-9.92%
Youth Reference	336	551	-39.02%	1,185	1,910	-37.96%
HR Phone	9	23	-60.87%	39	72	-45.83%
HR Ready Reference	200	317	-36.91%	1,387	1,593	-12.93%
HR Reference	2	14	-85.71%	75	94	-20.21%
Circ Phone	691	473	46.09%	3,738	3,008	24.27%
Circ Ready Reference	627	463	35.42%	4,750	2,120	124.06%
Circ Reference	1,310	1,260	3.97%	7,606	4,095	85.74%
Total Edutainment LAN Use	0	165	-100.00%	0	1,402	-100.00%
Total Internet Computer Use	1,725	1,658	4.04%	10,239	10,509	-2.57%
Youth Computers	298	296	0.68%	1,237	1,271	-2.68%
Adult Computers	1,424	1,360	4.71%	8,987	9,208	-2.40%
Laptop Computer Circulated	3	2	50.00%	15	30	-50.00%
Total Electronic Transactions	71,578	62,423	14.67%	373,409	286,185	30.48%
WebSite Hits	61,232	52,131	17.46%	309,794	221,821	39.66%
WebCatalog Sessions	8,997	8,891	1.19%	54,776	54,968	-0.35%
Licensed Database Hits	1,349	1,401	-3.71%	8,839	9,396	-5.93%

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

Christy Klien, Library Director

MLA ADVOCACY NEWS

June 2026

House Property Tax Overhaul Threatens Local Library Funding

Last month, a bill package was introduced in Michigan's House of Representatives that seeks to eliminate certain property taxes and limit future property tax growth across the state. The Michigan Library Association stands in opposition to several of the bills – House Bills (HB) 5872, 5878, and 5880 – as they raise significant concerns by reducing local revenue streams that support public libraries and increasing certain administrative costs for libraries. MLA recognizes that thoughtful property tax relief deserves real consideration, but these bills would reduce local revenue for public services without providing reliable replacement funding for libraries.

Michigan residents consistently support their local libraries at the ballot box, and any property tax reform should preserve local investment opportunities and local control. Libraries understand that many homeowners are struggling and that Michigan's state property tax system warrants serious review. A successful reform package should provide meaningful tax relief while also ensuring sustainable funding for the services that Michigan communities depend on every day.

For Michigan's public libraries, the stakes are especially high. Over 75% of funding for public libraries comes from locally approved property tax millages. Libraries depend on stable and predictable millage levies to fund operations, collections, programming, technology, and the trusted professional staff that deliver necessary learning and information services. When property tax revenues are reduced, libraries are faced with difficult decisions around staffing, open hours, deferred maintenance, and crucial resources provided across the state.

HB 5872 would eliminate the uncapping of taxable value when property changes ownership. While intended to provide tax relief for new buyers, uncapping is one of the few mechanisms that allows local tax bases to gradually keep pace with real estate values. Eliminating the uncapping of taxable value would reduce future revenue growth for library millages already approved by voters. Over time, libraries could experience a widening gap between operating costs and available revenue, while demand for library services continues to grow in many Michigan communities.

HB 5878 would eliminate the personal property tax on utilities and certain business equipment. While MLA acknowledges that reducing tax burdens on local businesses is a worthy policy goal, the proposal would remove another significant source of local revenue, with no long-term plan to keep libraries and other public services whole.

HB 5880 is part of the bill package's replacement revenue strategy, but it creates additional funding challenges and uncertainty for public libraries. The bill creates new costs through a proposed excise tax on services routinely used by libraries, such as legal counsel, accounting, consulting, and many other contracted services. Those costs would increase, placing additional pressure on already constrained operating budgets.

MLA will continue to track property tax reform legislation and share updates with Michigan libraries as they become available.

Federal Library Funding Update: Current Status and Next Steps

In April, the White House FY27 budget proposal once again recommended eliminating the Institute of Museum and Library Services (IMLS), including only \$6 million to shut down the agency. While concerning, this reflects the early stage of the federal budget process and does not determine final funding levels. Congress has repeatedly rejected similar proposals, and in FY26, maintained and modestly increased federal library funding.

Following the President's budget release, Congress reviews agency requests through the House and Senate Appropriations Committees, which hold hearings and establish initial spending allocations. Subcommittees then draft funding bills (the Labor-HHS-Education Subcommittees are responsible for IMLS) that move through committee votes, full chamber consideration, and eventual negotiation between the House and Senate before a final appropriations package is enacted or a continuing resolution is passed to extend funding. On June 5, 2026, the House Labor-HHS-Education Subcommittee advanced level funding for IMLS, and the Senate is expected to take up its version of the bill in mid-June.

The American Library Association (ALA) is leading federal library advocacy during this critical window, coordinating "Dear Appropriator" letters and urging advocates to contact their Senators directly in support of sustained investment in IMLS and other library programs. As appropriations work continues, these outreach efforts are focused on influencing funding decisions while they are actively being shaped in Congress over the coming weeks. Now is the time to contact your Senators—use ALA's Call to Action to email your Senator today and tell them to #FundLibraries in next year's federal budget!

MLA will continue to monitor federal budget developments and share updates, context, and opportunities for engagement as Congress works toward final funding decisions.

PDL Events

August 2026

Friends of the Library

Book Sale

Saturday, August 1st | 9:00 AM - 3:00 PM

Teen Summer Reading Pizza Party

6th-12th Grade

Tuesday, August 4th | 6:30 PM - 7:30 PM

Yoga with Apral

A gentle approach

Thursday, August 6th | 4:00 PM - 5:00 PM

Rainforest Radicals

A History of Rainforest Action Network

Tuesday, August 11th | 6:00 PM - 7:30 PM

PDL Monarch Waystation Tour

How You Can Help the Monarch Butterflies, Too!

Wednesday, August 12th | 6:30 PM - 8:00 PM

Back to School, Back to Math

For elementary-age kids and their favorite adults

Thursday, August 13th | 10:00 AM - 12:00 PM

Bedtime Storytime

For children 5 and under and their grownups

Thursday, August 13th | 6:30 PM - 7:00 PM

Kalamazoo Macintosh Users' Group

Saturday, August 15th | 9:00 AM - 12:00 PM

Genealogy Society

Monday, August 17th | 6:00 PM - 8:00pm

Yoga with Apral

A gentle approach

Tuesday, August 18th | 4:00 PM - 5:00 PM

Eating the Healthy Way with Dietician, Gretchen Kauth

Vegetarian Nutrition

Wednesday, August 19th | 6:00 PM - 7:00 PM

Kids Create

Youth Art Painting Project

Thursday, August 20th | 5:30 PM - 6:30 PM

Cooking Demo with Chef Gandia!

Live on the Charlie Cart!

Thursday, August 20th | 6:00 PM - 7:00 PM

Get to Know the Makerspace

A tour of machines and projects

Friday, August 21 | 11:00 AM - 11:45 AM

Kalamazoo County ID Program

Mobile Unit Event

Monday, August 24th | 3:00 PM - 5:00 PM

Makerspace Studio

Adult Faux Stained Glass Art Project

Thursday, August 27th | 5:30 PM - 6:30 PM

Portage District Library
2nd Quarter Report
June 30, 2026

<u>Revenue</u>						
Percent of Year Gone -->				50%		
General Ledger Category	2nd Qtr Actual	% of Annual Budget	2026 Annual Budget	YTD Actual	YTD Actual+Enc.	YTD % Received
Total Tax Revenue	\$ 130,863	2%	\$ 6,371,934	\$ 6,355,217	\$ 6,355,217	100%
State Aid Revenue	30,185	8%	395,000	396,558	396,558	100%
Other Revenue	408,663	135%	301,950	602,069	602,069	199%
Revenue (To)/from Reserves	1,000	0%	1,999,760	1,999,760	1,999,760	100%
Other Financial Sources	925,850	96%	962,900	925,850	925,850	96%
Total Revenue	\$ 1,496,561		\$ 10,031,544	\$ 10,279,454	\$ 10,279,454	102%

<u>Expenses</u>						
General Ledger Category	2nd Qtr Actual	% of Annual Budget	2026 Annual Budget	YTD Actual	YTD Actual+Enc.	YTD % Spent
Total Salaries & Wages	\$526,369	21%	\$ 2,485,205	\$1,061,453	\$1,106,953	45%
Total Fringes & Benefits	178,320	19%	946,907	372,843	393,618	42%
Total Library Materials	130,441	14%	965,365	335,613	504,102	52%
Total Utilities	38,589	22%	173,300	69,468	79,468	46%
Total Buildings	30,986	7%	420,120	79,778	181,828	43%
Total Furnishings & Equipment	0	0%	36,670	0	36,420	99%
Total Supplies	18,198	6%	292,818	51,254	179,439	61%
Total Professional Services	153,859	26%	585,010	199,407	288,047	49%
Total Other Charges	73,676	13%	545,787	249,369	367,602	67%
Other Financial Uses	925,850	96%	962,900	925,850	925,850	96%
TOTAL OPER. EXPENSES	\$ 2,076,288		\$ 7,414,083	\$ 3,345,035	\$ 4,063,327	55%
TOTAL CAPITAL PROJECTS	\$ 991,804	38%	\$ 2,617,461	\$ 994,218	\$ 1,831,359	70%
TOTAL EXPENSES	\$ 3,068,092	31%	\$ 10,031,544	\$ 4,339,253	\$ 5,894,686	43%

EFFECT ON FUND BALANCE *	\$ (1,571,531)	\$ 0	\$ 5,940,201	\$ 4,384,768		
---------------------------------	-----------------------	-------------	---------------------	---------------------	--	--

Cash Flow Analysis of all money including prior year(s)

12/31/2025 Audited Total cash (Fund Equity*) minus liabilities	\$ 13,746,770
+ 2026 Revenues	9,353,604
- 2026 Operating Expenses	2,419,185
- 2026 Capital Projects	994,218
- General Reserves	857,293
- Building Reserves	50,000
- Benefits Reserve	29,740
- Technology Reserve	111,305
- Patio Feasibility Reserve	4,700
- Personal Property Tax Reserve	805,946
- Building Improvement Reserve	731,419
- Library Endowments	109,064
- Prepaids	38,954
- Encumbrances	1,555,433
Total available cash as of 3/31/2026 (Fund Balance*)	\$ 15,393,117

* 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 \$16,700 below budget at the end of the 2nd quarter. The Library has received all of its payments with the exception of the annual PILT payment. 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 that will be made up for in other revenue areas.

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 its first State Aid payment in April in the amount of \$30,185. This payment results in the Library meeting its state aid revenue budget 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 (\$26,450).

Other Revenue - Other Revenue is well ahead of pace for this time of year. Interest income will be collected throughout the year as interest is earned. Revenue from interest through the 2nd quarter is \$87,600 above 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 \$274,500 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.

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 was paid by ACH on April 25, 2026 in the amount of \$925,850.

Salaries & Wages - Salaries & Wages are below pace for this time of year. The Library budgeted to add three (3) new positions in 2026. The first is a Full-time Adult Librarian in charge of outreach. This position is currently in the process of hiring and an offer should be made to a candidate by the end of July. The next position is a Part-time Makerspace Asst. geared towards Youth Services. This position is in the process of recruiting candidate and should be filled by early September. The last position is a Part-time Human Resources Generalist. Recruiting for this position has not begun and will hopefully be filled by year-end. Otherwise, there are small savings of funds from the lag time of filling positions as they become available.

Fringes & Benefits - Fringes & Benefits are less than 50% expended as of June 30, 2026. This is due to two (2) employees opting out of the Library's insurance plan and picking up a spouse's insurance plan and a budgeted full-time position being vacant. 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.

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 second quarter of FY2026, gas & electric expenses are approximately \$8,500 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.

Portage District Library
2nd Quarter Report
June 30, 2026

Building - Year-to-date actual and encumbrances are below the 50% target. The Library received a distribution from the Michigan Municipal Risk Management Authority (MMRMA) for building insurance premiums totalling \$13,567. This was offset against current years invoices.

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 it spending for lines such as supplies.

Professional Services - This category is on pace for this time of year. Lines in this category fall within the realm of projects or monthly expenses and that can skew the overall expenditure balance one way or the other. 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 that have not been fully expended for the year. The annual financial audit and bond disclosure filing requirements have been completed. 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 encumbrances from FY2025 and the large bond payment (\$925,850) in May. Projects designated under the Technology Plan typically begin in the 4th quarter.

Monitoring Report on the Executive Limitation Policy for Minutes and Records Retention

August 2023

As an elected, public governance body, the Library Board will generate and retain official board meeting minutes and other board records in a manner that complies with the Michigan Open Meetings Act (Public Act No. 267 of 1976, as amended.)

Policy: 1. Minutes will be produced for all library board meetings, and will contain:

- a. Information about the agenda topics, and the date, time and location of the board meeting.
- b. A list of all attendees/absentees.
- c. A brief summary of any public comments, staff presentations or discussions.
- d. A record of any decisions made at the meeting; motions made with the results (may include a very brief summary); and a record of all roll-call votes.
- e. A listing of other topics discussed (may include a very brief synopsis of the discussion.)
- f. A list of unresolved issues or other items to be carried forward to the next month (may include a brief discussion).
- g. References to any pertinent supporting documents, as deemed appropriate by the Library Director, Board Secretary or as requested by the Library Board.

Director's Response:

The contents of the minutes produced for the Portage District Library Board include: (1) date, time, location and agenda topics for the meeting; (2) list of attendees and absentees; (3) summary of public comments and all other discussions; (4) a record of decisions and motions made and votes taken; (5) a list of other topics discussed; (6) a list of unresolved issues or other items to be handled at a future date; and (7) references to pertinent supporting documents.

In compliance with the State of Michigan's OPEN MEETINGS ACT 267 of 1976, requiring **proposed minutes to be available for public inspection within (8) business days after the meeting**, the board meeting minutes are e-mailed to trustees for review, made available at the Adult Information Desk for public inquiry, and kept on file in the Library Office for easy access and referral. A list of any issues needing further consideration is maintained and used to generate agenda items for subsequent board meetings. **Approved minutes will be available for public inspection within (5) business days after the meeting** and are made available on the library's website, at the Adult Information Desk, and kept on file in the Library Office for easy access and referral.

Every effort is made to produce professional, informational and accurate minutes of board meetings that will be retained in Library Archives as the only permanent record of Library Board activities and the chronological progress of the Portage District Library over the years.

Policy: 2. RETENTION of library board meeting official minutes, notes, and audiotapes will be kept according to the official record retention schedule adopted by the State of Michigan as follows:

- a. For open session library board meetings, official minutes will be **retained indefinitely**.
- b. For open session library board meetings, **recordings will be retained until official minutes are approved by the Library Board**, after which the recordings will be deleted.
- c. For open session library board meetings, **notes taken by the Library Board Secretary for the purpose of producing official board meeting minutes will be retained until official minutes are approved by the Library Board**, after which the notes will be deleted.
- d. For closed sessions of library board meetings, official minutes will be recorded but will not be available for public inspection unless disclosure is required by a civil action. **These closed session minutes may be destroyed one year (365) days and (1) day after approval of the minutes of the regular meeting at which the closed session was approved.**

NOTE: Except for minutes taken during a closed session, all minutes are considered public records, open for public inspection, and must be available for review (on the library's website and in print) as well as copying at the address designated on the public notice for the meeting.

***Director's
Response:***

The process for retaining minutes of Library Board meetings is followed according to this Executive Limitation Policy. The Board Secretary maintains all Library Board meeting files and complies with all retention period requirements.

Open session board meeting minutes in print are kept indefinitely. Recordings and notes for each open session library board meeting are kept until official minutes are approved by the Library Board and are subsequently destroyed.

After each board meeting, minutes are filed by board meeting dates in both the Library Office and in library archives in the Heritage Room. These files are weeded at the end of the fiscal year and old board meeting files with minutes are rotated out of the active file into the Business Storage Room.

Closed session minutes are kept separately from regular session minutes, and are not made available to the public.

Memo

Internet Filtering Discussion

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

BACKGROUND:

The Portage District Library is required to discuss internet filtering annually at a public board meeting in accordance with Children's Internet Protection Act (CIPA) in order to apply for USF E-Rate funding.

The FCC statement is as follows:

"Schools and libraries subject to CIPA may not receive the discounts offered by the E-rate program unless they certify that they have an Internet safety policy that includes technology protection measures. The protection measures must block or filter Internet access to pictures that are: (a) obscene; (b) child pornography; or (c) harmful to minors (for computers that are accessed by minors). Before adopting this Internet safety policy, schools and libraries must provide reasonable notice and hold at least one public hearing or meeting to address the proposal."

The library currently has an Internet Policy that addresses the above requirement. In Section III of the Library's Internet Policy we state that all library workstations and all library wireless connections are filtered to comply with Children's Internet Protection Act ("CIPA") and Michigan's Public Act 212 of 2000 ("PA 212").

The library uses the following technology and services to comply with its policy. Cisco Umbrella has been configured to filter DNS requests from all wired and wireless devices at the Portage District Library in accordance with CIPA. The filtering profile has been extended to remote proxy and anonymizers categories to prevent a means to bypass its filtering. The library utilizes MobileBeacon and Sprint (now T-Mobile) to apply CIPA filtering on all of its circulating hotspots.

RECOMMENDATION:

I recommend that the Library Board vote to continue to maintain its CIPA compliant Internet Policy and allow the library to pursue USF E-Rate funding for all eligible technology and services.

Computer and Internet Use Policy

I. General Statements Regarding Internet.

A. Internet Access.

The Portage District Library provides access to a broad range of information resources, including those available through the Internet. Access to the Internet enables the Library to expand its information services significantly. This Policy applies to both the Library owned computers and wireless access available at the Library.

B. Validity of Information.

The Internet offers access to a wealth of information and Internet sites including useful ideas, information and opinions from around the world. However, not all sources on the Internet provide information that is accurate, complete or legal. Internet Users will need to evaluate for themselves the validity of the information found.

C. Library Does Not Endorse Information on Internet.

Because the Internet is a vast and unregulated information network, it also enables access to information, ideas and commentary beyond the confines of the Library's mission, selection criteria, and collection development policies. The provision of access does not mean or imply that the Library endorses or sanctions the content or point of view of any of the information or commentary that may be found on the Internet.

D. View Internet at Own Risk.

The Internet may contain information that is controversial, sexually explicit or offensive. Users are cautioned that ideas, points of view and images can be found on the Internet that are controversial, divergent and/or inflammatory. Because of this and the fact that access points on the Internet can and do change often, rapidly and unpredictably, the Library cannot protect individuals from information and images which they might find offensive, disturbing or inaccurate. Library patrons use the Internet at their own risk. Parents or guardians of minor children are responsible for their child's use of the Internet through the Library's connection as stated more fully below.

E. No Liability.

The Library assumes no responsibility for any damages, direct or indirect, arising from its connections to the Internet. Patrons shall use Library computer hardware and software at their own risk. The Library is not responsible for equipment malfunction, loss of data, any damages to the User's disks, data, or electronic transactions of any type. The Library is not responsible for the loss of any portable media.

II. Nature of the Public Library Setting.

A. Respect Others.

Because Library Users of all ages, backgrounds and sensibilities are using the computers, Library patrons are asked to be sensitive to other's values and beliefs when accessing potentially controversial information and images.

B. Use with Caution of Risks.

Users are cautioned that, because security in an electronic environment such as the Internet cannot be guaranteed, all transactions, files and communications are vulnerable to unauthorized access and use.

III. Internet Filtering; Children Under 18

A. Internet Filtering – General.

i. Filtered Access.

In order to comply with the requirements of the Children’s Internet Protection Act (“CIPA”) and Michigan’s Public Act 212 of 2000 (“PA 212”), all computer terminals are filtered. Further, the Library’s wireless access is also filtered. Filtered access means the computer or wireless system has a program installed that is designed to restrict minors¹ from receiving obscene material or sexually explicit material that is harmful to minors as defined by PA 212 and visual depictions that are obscene, child pornography or harmful to minors as defined by CIPA. This filtering method is designed to prevent access by minors to inappropriate matter on the Internet. Children under the age of 18 shall only use the Library computers designated and posted for use by minors.

ii. Safety of Minors Regarding E-Mail.

The Library does not filter e-mail or other direct electronic communications. It is the responsibility of the parent or guardian to educate the minor on safety and security and monitor the use of these communications.

iii. Internet Access.

Patrons wishing to access the Library’s workstations must possess a valid library card or internet user card. If a patron doesn’t have either then he/she must register for a card at the Checkout desk. Then, the patron must read and accept the Library’s Internet Use Policy. All patrons should be able to show proof of identification if requested by a staff member.

B. Internet Filtering – Patrons 18 Years of Age or Older.

i. Disable Filters.

Patrons 18 years of age or older may request to have the filters disabled for bona fide research or other lawful purposes. The Library’s wireless access cannot be disabled, so any patron who desires to have the filters disabled must use the Library’s computers.

ii. Unblock Sites.

Individuals 18 years of age or older who believe an Internet site has been improperly blocked can request that the site be “unblocked.” A decision on the site’s status will be made by the Director or his or her designee, who will prepare a written reply to the individual submitting the form.

C. Internet Filtering – Patrons Under 18 years of Age.

i. Responsibility of Parents and Legal Guardians.

As with other materials in the Library’s collection, it is the Library’s Policy that parents or legal guardians are responsible for deciding which library resources are appropriate for their children. The Library urges parents and guardians to discuss Internet use with their children and to monitor their use of this educational tool. Parents and youth patrons are encouraged to talk to the Librarian regarding both the benefits and pitfalls inherent in its use.

ii. Un-filtering Terminals.

Minors who are 17 years old may only have the filters (filters used to filter visual depictions of obscenity, child pornography and material that is deemed harmful to minors as prohibited by CIPA) disabled on a computer used by that patron for (1) bona fide research or other lawful purposes and (2) only if a parent or legal guardian has accompanied them to the Library and is sitting at the computer station or terminal at all times. Patrons under the age of 17 may not ask for the workstation to be unfiltered pursuant to the requirements of CIPA.

¹ Under Michigan Law, “adults” are 18 years of age or older. CIPA defines an adult as 17 years of age or older. As required by CIPA, 17 year olds may have the filter disabled, but only as specifically described in Section C.3 below.

iii. Unblocking Websites.

Patrons under the age of 18 may request in writing that a particular site be unblocked, but only if the site does not include obscene or sexually explicit material deemed harmful to minors or other material prohibited by law. The Library Director shall make that determination.

IV. Procedure for Use.

A. Reservation/Time Limits.

- i. If a User wishes to use the Internet station, the User may use a computer if he/she has a valid library card or internet user card. Internet computers are available on a first come first served basis. There are no waiting lists and time extensions are not granted when library computers are at capacity.
- ii. Patrons are required to sign in using their valid barcode and pin.
- iii. The Patron must possess a valid (not expired) library card or internet user card.
- iv. The User may sign up to use the Internet station for periods of only one(1)hour at a time for one time per day. Use of the Internet stations is available on a first come, first served basis. If no one is waiting, the User may use the terminal for additional 30 minute increments until another User signs up to use the terminal.
- v. Patrons must sign out by clicking the "End Session" button. Upon clicking the button the computer will reboot and reset the computer for the next patron.

B. Availability.

The public computers are only available for use by Users if they are not being used for Library purposes, such as classes, staff training or special programs. The Library reserves the right to have first priority of use for Library uses, sponsored events or co-sponsored events. Library patrons should be aware that there are some computers that are limited to only the online public access catalog and research databases and have been kiosk'd for the intended use. The online public access computers are available on a first come, first served basis.

C. Closing.

All computers and printers are shut down ten (10) minutes before the Library closes.

D. Reimbursement for Printing.

The library has a print vending system through which Patrons pay for printed materials. Currently the Library charges ten (\$.10)cents a page for black and white printing and seventy-five (\$.75) a page for color printing. Print jobs are retained for reprinting purposes until the end of the day at which time the print jobs are purged. The Patron shall be responsible for all printing costs, so Patrons are encouraged to use "print preview" so that they are aware of the number of copies.

V. Acceptable Use.

All Users of the Library's Internet connection and workstations are expected to use this resource in a responsible and courteous manner, and to follow all rules and procedures as established in this Policy.

A. Lawful Use.

The Library Internet connection and workstations shall be used in a lawful manner. The Library's Internet and workstations cannot be used for any fraudulent or unlawful purpose prohibited under any applicable federal, state or local law, including, but not limited to, accessing material that can be classified as obscene or child pornography.

B. Intellectual Property.

Users must respect intellectual property rights and obey the copyright laws of the United States and all other intellectual property rights. Responsibility for any consequences of copyright infringement or violations of other laws or agreements lies with the User. The Library expressly disclaims any liability or responsibility resulting from such use.

C. Use Must Not be Harmful to Minors.

Michigan law prohibits Users from allowing minors access to sexually explicit materials harmful to minors. Internet Users shall also not permit any minor to view sexually explicit material or any other material deemed harmful to minors.

D. Compliance with Patron Behavior.

The same rules apply to the use of the Internet as with the use of any other Library materials. The Library has adopted a Patron Behavior Policy. All Internet Users must comply with the Library's Patron Behavior Policy, which shall be posted in the Library.

E. Privacy; Unauthorized Access.

Users must respect the privacy of others by not misrepresenting oneself as another User; by not attempting to modify or gain access to files, passwords or data belonging to others; and by not hacking or seeking disallowed access to any computer system via the Internet.

F. Time Limit.

Failure to leave a computer terminal upon the expiration of the allotted time is a violation of this Policy.

G. Personal Software Prohibited.

The Users shall refrain from use of personal software, the attachment of equipment to the Library's computers or networks or the modification of any operating system or network configuration. The User shall also refrain from downloading/uploading files to/from the Library's computers.

H. System Modifications.

Users are not permitted to change the security setup, operating systems, the network configuration or any other configuration of any Library computer workstation without authorization. Users may not damage or gain unauthorized access to the computer or network or repeatedly or intentionally visit websites that introduce spyware, malware, virus or other damaging programs.

I. Damage.

The User shall be responsible for repayment of any costs to the Library for damage to the computer terminals or system.

J. Terminal Use.

- i. Only two (2) people may use a workstation.
- ii. No person may stand behind another person.
- iii. Upon request, Library staff members may approve and allow additional Users at a workstation.

K. Personal Information; Unauthorized Release.

No patron, including minors, may engage in the unauthorized disclosure, use and dissemination of personal information of any person, including minors.

L. Saving Files and Documents.

Patrons who wish to have a permanent record of their work need to save files and documents on their own portable media. Library computers do not allow Users to permanently save documents or personal files to the hard drive.

M. Purposes; Prohibited Uses.

The Library's Internet resources should be used for educational, informational and recreational purposes only. The Library's Internet access shall not be used for personal profit or commercial activities, including the sale of goods and services or fund raising. The Library Internet is intended for information gathering only.

N. Chat Rooms; Instant Messaging.

The use of chat rooms and instant messaging is prohibited.

VI. Violations of Internet Use Policy.

The Library Director or the Director's designee may restrict access to Library facilities by (1) terminating or limiting computer, internet access or Library facilities; (2) immediately dismissing the patron from the premises; (3) suspending the patron's access to Library facilities for a set period of time; or (4) by denying access to specific services and/or programs pursuant to this Policy. If necessary, the local police may be called to intervene.

A. Incident Reports.

Library Staff shall record in writing in the form of an Incident Report any violation of this Policy that resulted in a verbal warning or a suspension of Library privileges. By the end of the day on which the incident occurred, an Incident Report shall be written and forwarded to the Library Director for logging and review. The report should include physical descriptions in addition to the name of the patron. A copy of the suspension of privileges letter should be attached, if applicable.

B. Violation of the Policy – Suspension of Privileges.

Unless otherwise provided in this Policy (see Section C below), the Library shall handle violations as follows:

i. Initial Violation.

Library patrons observed violating this Policy will be asked to cease the violation with a verbal request. If the patron does not comply with the request, he or she will be asked to leave the building for the day. If he or she refuses, police may be called.

ii. Subsequent Violations.

The Director or the Director's authorized designee may further limit or revoke the patron's Library privileges if infractions continue. Such limitation or revocation shall be in writing specifying the nature of the violation. Subsequent violations of the same rule shall result in additional suspensions of increasing length.

C. Violations That Affect Safety and Security.

Violations involving violations of law (including child pornography and allowing minors to view sexually explicit or other material deemed harmful to minors), violence, threatening behaviors, sexual or other harassment, vandalism, theft or attempted theft, sexual misconduct or any behavior that threatens the safety and security of staff and/or patrons shall be handled as follows:

i. Initial Violation.

The police will be called immediately. If the conduct constitutes a violation of local, state, or federal law, arrest or criminal prosecution may ensue. Violations of this nature will result in an immediate minimum two-week suspension of Library privileges. The Incident Report shall specify the nature of the violation.

ii. Subsequent Violations.

The police will be called immediately. If the conduct constitutes a violation of local, state, or federal law, arrest or criminal prosecution may ensue. The Director or the Director's authorized designee may further limit or revoke the patron's Library privileges in escalating responses, which will be documented in writing. Subsequent violations of the same rule will result in additional suspensions of increasing length.

D. Reinstatement.

The patron whose privileges have been limited or revoked shall attend a meeting with the Director or the Director's designee to review the Library Patron Behavior Policy before their privileges may be reinstated. The Director or the Director's designee may attach conditions to such reinstatement and shall provide written notification of those conditions and the duration of the conditions.

E. Civil or Criminal Prosecution

Illegal acts involving the Library's Internet access service may be subject to civil or criminal prosecution.

VII. Right of Appeal.

Patrons may appeal a decision to (1) limit or revoke privileges or (2) attach conditions to reinstatement by sending a written appeal to the Library Board within ten (10) working days of the date the privileges were revoked or limited or the written statement of conditions was provided, whichever is applicable. The appeal should be sent to the President of the Library Board. The decision of the Library Board is final.

VIII. Staff Assistance.

Staff may assist Library Users in getting started on the Internet. However, the Library cannot guarantee that Internet-trained staff will be available to assist Users at all times the Library is open. Because of the many different applications available on the Internet, staff may not be able to provide specialized or technical knowledge about a particular application. Users who need training on Library software or digital collections should request an appointment.



Portage District
LIBRARY

STRATEGIC PLAN

2023-2026

SECOND 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: LoT will be offering a Trickle Charger to our patrons. Batteries that run things like a car, jet ski, golf cart, lawn mower, and any other vehicle will slowly self-discharge over time. In essence, a trickle charger is a special type of battery charger designed to replenish a vehicle battery at a very low, slow rate. (The slow, gradual charging speed is actually why they're called "trickle" chargers in the first place.) In most cases, the charge rate is about equal to the battery's natural rate of self-discharge. This makes it possible to leave the battery connected to the charger on a long-term basis, as there's little to no chance of it actually overcharging the battery and damaging it in the process. Slow charging is a safer way to charge a battery because it will not overheat or explode.

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

UPDATE: -In April and May, Brian Tilbury displayed his artwork in the café, while Brenda Troyer's art was featured in June.

-In April and May, MRC Industries featured their clients' pieces in the atrium. In June, Ron Dumont and friends' annual animal exhibit featured elephants.

Feedback from patrons:

"Keep adding this amazing art. It's important that we recognize its beauty."

"I love seeing art from my community here. As an artist it brings energy to the space that makes me want to stay here longer."

Ten young artists and 12 young collectors exhibited their work during the first half of this year.

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: Q2 programming included new and existing community partners including WMU staff and faculty, the Kalamazoo County Sheriff's department, and Legal Aid of Kalamazoo. Each organization was able to inform the public on prominent community needs.

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

UPDATE: Outreach Librarian Andrea Smalley worked with a Leadership class at Portage West Middle School to create service projects which culminated in a visit to the Library and discussion with staff. In addition, Smalley coordinated with an outside performer to provide an Arabic storytime. She also spoke to a group of multilingual educators at a KRESA professional development event.

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: There is no update at this time.

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: There is no update at this time.

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: Books by Mail circulation has steadily increased since launch. There were more deliveries in Q2 (16 deliveries comprised of ~40 items) than Q4 2025 and Q1 2026 combined (8 deliveries comprised of ~16 items).

Staff provided outreach to Milham Meadows, Woods Edge, Portage Public Schools ELL classes, and Headstart Family events.

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

UPDATE: On Sunday, June 21st, the adult department tabled at the Farmer's Market. Lawrence Kapture and Tyler Flores answered questions, and enticed passers by with knowledge of the arcane and wonderful services granted by membership at the Portage District Library. Tiny rubber duckies with glitter drew many an eye towards our table, from which we regaled Portage residents with tales of the library's splendor. We made contact with 242 patrons.

Staff provided outreach to Adventures Learning Center and Portage Public Schools 3's preschool.

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. This year's Staff Development Day is being planned for September. The focus will be on library privacy laws and practices, recognizing burnout and compassion fatigue.

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 through the following programs:

- Cupcake Decorating Tips
- Yoga with Apral on multiple occasions
- Speed Friending on two occasions
- Kalamazoo County ID Program
- Discussion on Racial Relations with Donna Odom
- Recognizing Scams and Freuds
- Sound Immersion on two occasions
- Generative Artificial Intelligence Writing Workflows with Dr. Brian Gogan
- Muffins and the Market
- Speed gaming
- Author Hop 2026!
- Caregiving for a Loved One Experiencing Cognitive Decline with Courter Memory Center
- Plots and Pages
- Pub(lic) Library Trivia
- Pop Culture Trivia
- Cooking Demo with Chef Gandia
- Plots and Pages
- Know Your Rights!
- WMU Student Poetry Reading
- Poetry Carnival with the Friends of Poetry
- Understanding Cryptocurrency presented by WMU's Sanford Center
- Professional Headshots at PDL
- Spring Home Maintenance with Community Homeworks
- Five book groups were hosted: Light Lunch and Literature, Reading Together, and International Mystery

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

UPDATE: 'Documentary and Doughnuts maintained strong attendance, with 13 in April, and broke the May curse of single digit/person attendance with 22 attendees.

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: MakerSpace staff Sean Cornish suggested creating book cover magnets for distribution at outreach events. Staff then created magnets that were popular at Young 5's family events and Pride.

Youth Outreach Librarian Andrea Smalley created and updated a Juneteenth booklist at the request of the City of Portage.

3.2.3 Invest in more device offerings.

UPDATE: “Introduced this quarter, the adult Library of Things collection offers a few things to enhance your life.

Table Top Loom: Table looms are a compact alternative to larger multi-shaft floor looms. Their small size and portability make them perfect for guild meetings, workshops, and sampling. Make a variety of home textiles from scarves to table linens.

The HP Sprocket Photo Booth is in high demand, requiring the library to purchase a second copy. This is a great device to enhance any party or gathering.

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

Activities:

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:

April – Book and Movie adaptations, Baking, Gene Picks for DVDs, Magazine Highlight, Cowboy Romance, Drawing Manga and Comics.

May – Mental Health Awareness, Wealth, May Author Birthdays, Aliens, Character spotlight: The Hulk, Digital Stories that received physical prints.

June – Alzheimer’s and Brain Awareness, FEAR, International DVDs, Juneteenth, LGBTQIA+ Authors in Fantasy and Sci-Fi, PRIDE in Manga and Comics.

The Adult DVD display has yielded results in highlighting some of the less-circulating DVD collections (especially International and Documentary). Both sections saw a 10-20% increase in circulation in Q2.

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: ‘The Adult World Language move is proceeding well with a quarter of the collection reclassified to our new scheme (E.g. AWL-Spanish-Learn-CO) in anticipation of the collections permanent move to the current AWL/Adult Ready Read section. This move should be completed in Q3 2026.

3.3.3 Prioritize accommodating people with disabilities when designing or selecting offerings.

UPDATE: There is no update at this time.

PORTAGE DISTRICT LIBRARY TECHNOLOGY PLAN 2027-2029



**Submitted by
Rolfe Behrje
Portage District Library Systems Administrator**

EXECUTIVE SUMMARY

What is the 3-Year Technology Plan?

The Portage District Library's 3-Year Technology Plan serves as a guide for the library's technology goals and objectives. This document describes the technology initiatives for the next three years as part of a library-wide effort to fulfill the library's mission, vision, and Strategic Plan. This plan is a living plan and the technology activities and projects described in it are "proposed activities" and may change with the needs of the library and its patrons.

How is the 3-Year Technology Plan Developed?

As a way of focusing attention and expertise on technology matters, the library has teams addressing social media, web services, technology, public access projects, and staff projects. These teams engage in various activities including identifying technology needs; researching & discussing innovative technologies; and making recommendations to library administration for adoption of these technologies at the library. With the dramatic growth of technology, internet services and smart devices, the various teams add voices and knowledge to the library's technology plan. This open, decentralized method is the reason that the library is a high-quality reliable resource for its public.

What is the Process Followed to implement the 3-Year Technology Plan?

Library teams conduct extensive research, explore technology options for the library, test hardware/software and recommend technologies that would be advantageous for the library and its patrons. The ideas, plans and recommendations from these teams are documented, quoted, and turned into budget requests. The Library Director, Business Manager and Systems Administrator evaluate these requests as potential library projects within the budget. The decision process for making a formal technology project request starts at the administrative level where library administrators evaluate the total cost of operation (TCO) and the overall impact to the institution. If there is administrative support, then the library begins to identify sources of funding. These proposed projects are subsequently included in the library's proposed budget that is developed in May and presented to the Library Board in June/July/August for approval. There is also corresponding information about technology initiatives provided in the library's Strategic Plan. In July, the library presents its 3-Year Technology Plan to the Library Board.

Over the years the Portage District Library put into practice a different technology refresh cycle as a cost-saving measure during a period of declining revenue. This new technology management scenario reset the standard technology refresh rate to a more stringent minimum 5-year refresh cycle, established the expectation that the replacement of essential hardware and software on an "as needed" basis. Other cost-saving tactics that the library is actively pursuing include virtualization technologies (running multiple, independent, virtual operating systems on a single physical computer) and SaaS (Software as a Service).

While longer refresh cycles, virtualization and SaaS may put increased pressure on the core network, combining resources will benefit the library by lowering the total cost of technology ownership; enabling longer, usable equipment life spans and providing for more granular control on what needs to be replaced (meaning a more modular, customized system with more flexibility).

Upgrading library technology in this manner allows the library to: (1) Spread out technology changes at the library over a longer period of time rather than having a massive upheaval every 4 to 5 years; (2) Schedule its investment in technology over a revolving 5-year cycle; (3) Re-purpose older technology where possible, and (4) Better prioritize and plan for investments in new technology as needs are identified and as financially viable.

The goals and objectives of library technology are driven by the library's vision, mission, and Strategic Plan. Technology are the tools by which the library achieves its institutional purposes and defined outcomes. Naturally, as these institutional purposes change, the library's technology initiatives follow.

Below are seven primary technology initiatives targeted for the next three years (2027-2029):

- (1) The Portage District Library will make use of new technologies like RFID (Radio Frequency Identification) to empower patrons with self-service, to manage its ongoing operations effectively and to reallocate staff time for more direct personal patron assistance.
- (2) The Portage District Library will build web services on standardized platforms to provide for the efficient retrieval of library information, to manage major web service offerings and to promote library services via the web in an ongoing cost-effective manner.
- (3) The Portage District Library will transition from deploying local server and virtualization technology and storage consolidation to private cloud hosting (SaaS – Software as a Service) to eliminate single points of failure, to ensure that these resources are available to the maximum extent possible and reduce capital hardware investments while leveraging the Library's WAN connections.
- (4) The Portage District Library will provide the necessary technology and Internet bandwidth to enable library patrons and staff to conduct daily business and functions, to make its web services available to the larger Internet community, and to allow for remote support services that will be necessary for smooth, continuous operations.
- (5) The Portage District Library will provide the necessary communication tools for library staff and patrons to enable library patrons and staff to conduct daily business and functions, access digital services, to be creative and learn, and increase productivity of library operations.
- (6) The Portage District Library will provide peripheral technologies to extend its services to patrons in new dynamic formats.
- (7) The Portage District Library will build the necessary technology infrastructure to support new library initiatives and extend its network to support new systems and devices.

Evaluate and Implement New Technologies/Services in the next three years (2027-2029):

Adopting new technology is critical to the ongoing success of the Portage District Library. For example, RFID was both evolutionary and revolutionary for the library. Proximity encoded numbers allowed the Portage District Library to enhance its basic circulation services, collection management services, and to introduce new efficiencies in applying these services.

Goals for New Technologies include:

- (1) Providing staff tools (like RFID readers, software, and mobile technology) for efficient and active management of the library's collections and circulation.
- (2) Provide expanded public service technology tools for creativity and productivity.
- (3) Reviewing and proposing new solutions as they apply to the Portage District Library.
- (4) Deploying MobileStaff for outreach circulation, membership drives and Offline transactions.
- (5) Manage and extend Public Access Computer Management and Public Access Printing.
- (6) Improving Wireless Access for increased density and volume throughout the physical space.
- (7) Extending Wireless Access throughout the library grounds.
- (8) Reviewing and expanding managed technology services like firewalls and DNS.
- (9) Refreshing existing and extending RFID technologies as needed.
- (10) Evaluating and implementing technology in the library's Creation Station.

Goals for Web Services at the Library in the next three years (2027-2029):

Issues, ideas and goals relating to the library's web resources include:

- (1) Manage and extend Content Management System (WordPress) for the library that allows better management, more flexible design, and interoperability with other library web services.
- (2) Continuing to enhance security and hardening of web services.
- (3) Continuing to enhance patron accessibility to the library's web resources through the library's online catalog, online databases, and digitized local history resources.
- (4) Developing the library's Teams and SharePoint for collaboration and intranet resources.
- (5) Reviewing and extending Beanstack for reading program management.
- (6) Monitor and enhance Responsive Web Services for non-traditional devices through the library's Device Apps (PDL Mobile, Libby, Hoopla), the library's website and the library's catalog.
- (7) Exploring software solutions to help manage and deliver services. The services include but are not limited to room booking, event/calendar management, online reference tools, and school/organization partnerships.
- (8) Utilizing formal social networking platforms like Facebook and Twitter to increase the library's web presence among all segments of the population.
- (9) Developing and enhancing the SD Enterprise Discovery system.
- (10) Researching and deploying enrichment services to the catalog and research searching.
- (11) Researching digital media circulation platforms and search consolidation.

Virtualization, Cloud Hosting and Software as a Service at the Library in the next three years (2027-2029):

Server virtualization and virtual computing (methods of running multiple, independent, virtual operating systems on a single physical computer) have already saved the library thousands of dollars while empowering the library's network with greater flexibility for deploying and maintaining its electronic resources. The library is has now systematically moved to SaaS/Private Cloud relationships as the next generation of its network services. While virtualization saved the library money and energy usage, the transition to Software as a Service and private cloud hosting has added agility, resilience, and reliability.

Goals for virtualization/Saas include:

- (1) Continue transitioning from local cloud to private cloud hosted platforms and Software as a Service. The library began this change with its ILS (Symphony), Accounting and Records Management (Blackbaud & PaperSave) and fundraising (DonorPerfect).
- (2) Build its network and WAN connections with no single point of failure to achieve optimization of processing, memory, and storage resources.
- (3) Build secure network infrastructure with no single point of failure to safeguard client communication with the library's virtual environment.
- (4) Expanding core switching bandwidth to accommodate endpoint growth, expanded endpoint demands from streaming services.
- (5) Build reliable and consistent wireless coverage throughout the library to satisfy the growing numbers of mobile/wireless devices in use by patrons and staff.
- (6) Design and deploy managed hardware and software services for enhanced reliability, security and availability.

Internet Bandwidth at the Library in the next three years (2027-2029):

As the library evolves its new web technologies, deploys SaaS and private cloud hosted services, internet access and speed are paramount and must be monitored and upgraded for successful library operations. Internet bandwidth and reliability are critical to the library's daily operations. Fiber solutions must have software upgradeable dynamic bandwidth that can address connection needs in the future. As the library builds more virtual services that are predicated on a functional/reliable Internet connection, the library must deploy redundant connections to ensure business services are always available both internally and remotely.

Goals for Internet bandwidth include:

- (1) Continually checking Internet bandwidth and distributing resources in a timely manner to address growing needs for connectivity.
- (2) Using a point-to-point fiber connection to extend security/reliability/flexibility for remote backups, replication, and hosted virtual machines on demand.
- (3) Add a redundant EVC link for business continuity and robust internet service.
- (4) Provide adequate access and bandwidth for the 100+ Staff endpoints, 200+ Public Access endpoints and growing SaaS services.
- (5) Provide adequate access and bandwidth to the growing number of public access users on their computers, tablets, phones, and other mobile devices.

TECHNOLOGY PLAN 2027-2029

- (6) Provide adequate bandwidth for hosted services (SaaS) like OverDrive, Hoopla, MelCat databases, and Portage District Library databases.
- (7) Provide adequate bandwidth and access for meetings/trainings/webinars for public and staff.
- (8) Provide USF compliant filtering for access to ERate funding of internet bandwidth and related services and devices.

Communication Tools at the Library in the next three years (2027-2029):

Communication tools are a growing technology across all organizations. Phone and email have grown to include SMS (text messaging), Social Messaging (blogs, Facebook, Twitter), Mobile (Apps and Presence), and digital newsletters. As the various communication technologies grow, the library will take a pragmatic and cost-effective approach to adopting and integrating these technologies into its business platform.

Goals for Communication Tools include:

- (1) Research mobile accessibility to library services.
- (2) Set up and monitor pilot programs for the Portage District Library.
- (3) Manage and extend Cloud Hosted VOIP telephone system and its various services.
- (4) Evaluate alternative notification services for material notification (overdues and holds), registrations, and event notification, as well as library general communication.
- (5) Evaluate mobility tools for library staff.
- (6) Build and increase user-base of digital information products including our eNewsletter, NextReads, Communico Events and Registration, Room Bookings and Staff Bookings, Facebook, Twitter, and others.
- (7) Monitor and enhance digital signage/kiosk technologies at the library.

Peripheral Technologies at the Library in the next three years (2027-2029):

Assistive peripheral technologies are growing rapidly and will allow the library to provide services in new and innovative ways. The library has already developed new services such as dynamic digital signage and electronic gaming areas.

Goals for Peripheral Technologies include:

- (1) Evaluate services and training tools for library patrons through staff interaction on various devices.
- (2) Monitor and upgrade the ScanEZ (Multifunctional Copy/Print/Fax/Email/Save).
- (3) Monitor and expand circulating mobile wi-fi hotspots as needed.
- (4) Monitor and expand Creation Station Technology for patrons and staff to learn, digitize, and create.
- (5) Monitor and evaluate new technologies for the physical plant and grounds.
- (6) Monitor and evaluate new technologies for use in the library's meeting rooms.
- (7) Monitor and evaluate new technologies that can enhance library core service delivery.

Technology Infrastructure for Building Changes/Initiatives in the next three years (2027-2029):

As the library designs and continually renovates the physical plant, library technology infrastructure

will be selected and designed to support its new goals, devices, and services. The focus will be designing for the future.

Goals for building project infrastructure include:

- (1) Providing modern cabling throughout the physical building and grounds.
- (2) Providing a secure, climate controlled and redundant MDF for network appliances.
- (3) Providing IP services for Access Controls, Fire/Building Security, HVAC Controls and Lighting Controls.
- (4) Performing Wireless Surveys to assure robust and dense wireless coverage throughout the physical building and grounds.
- (5) Providing input to ensure infrastructure can grow for the next 50 years.

Staff Technology Training in the next three years (2027-2029):

Continued emphases is placed on enhancing the current staff's technology training. This is done in the form of seminars, user group meetings, and annual library meetings to teach staff about new ways of doing things using technology at the library. Formal training in a classroom setting will also help to decrease the library's dependence on outside technology specialists.

Goals for staff technology training include:

- (1) Training to support and deliver core library network services.
- (2) Training to support reliable, safe, and secure public and private networks.
- (3) Continue to send staff to meetings to share and learn.
- (4) Staff training to support and deliver the library's network services to end users.

Keeping Up to Date on New Technologies in the next three years (2027-2029):

As the library looks toward the future, a watchful eye will be kept on emerging technologies.

Goals for keeping up to date on new technologies will include:

- (1) Watching and assessing other new technologies of note such as: IoT, SaaS, PaaS, IaaS, dynamic digital signage, search interfaces as non-traditional devices (iPhone) become more and more prevalent; enhance VOIP (Voice Over Internet Protocol); and advanced web technologies to keep the library in the forefront as the community's information hub.
- (2) Administratively library technology services will be a focus on further developing the library's teams services, communication devices, and internal systems as mechanisms for disseminating information, managing projects/knowledge, and fostering internal communication.
- (3) Continue to monitor Modern Library Awards, Marshall Breeding Library Technology Guides and Trends, and others.

How will the 3-Year Technology Plan be Re-Evaluated and Updated?

The library's technology initiatives over the next three years will focus on three primary targeted areas for technology advancements: infrastructure bandwidth/redundancy, administrative services, and public access services. Various analytical methods are employed to ensure that all areas will have proper technology applied to enhance these areas of services, such as:

- Reviewing technology needs during the annual budgeting process to ensure that funding for library technology is based on actual needs of library patrons and staff.
- Analyzing the library's monthly usage statistics to determine how patrons are using the library's resources and to identify statistical trends over multiple years.
- Compiling and analyzing new statistics from the Library Document Station, Desktracker, Volgistics and surveys to spot trends for activities and services and to establish priorities.
- Using intelligent dashboards to monitor and assess traffic and usage.

Following extensive analyses as described above, the library's *3-Year Technology Plan* is re-evaluated each year considering direct and relayed observations, state and national trends, new technological advancements, economic conditions and most importantly PDL usage statistics. It is updated accordingly and presented to the Library Board in July of the following year. Due to the constant advancements and rapid changes in technology, the library's *3-Year Technology Plan* is in a constant state of evolution and should be regarded as a work in progress or living plan.

CONCLUDING REMARKS:

The *Portage District Library's 3-Year Technology Plan* serves as a master planning document for technology at the library. The Library Board, Library Director and Library Staff use this plan as a “blueprint” for the library’s technology infrastructure and development. The details provided in this document outline the library’s vision for its network in 2027-2029 and is a guide for selecting technologies and software in the future. For these reasons, a significant amount of time and effort will be spent defining expectations and desired outcomes for technology at the library, and the contents of this *3-Year Technology Plan* reflects that effort and coincides with the library’s approved Ends Statements which drive all activities at the library including the library’s technology initiatives and the library’s budget.

Mission Statement

Inspiring, Enriching, and Empowering Our Community

Vision Statement

We transform lives by cultivating connection, discovery, creativity, and personal growth.

Strategic Initiatives 2023-2026

Strategic Initiative #1

STRENGTHEN THE COMMUNITY

We facilitate community members learning, creating, and expressing creativity.

Strategic Initiative #2

EXTRAORDINARY EXPERIENCES

We provide exceptional services that are delightful and meaningful interactions.

Strategic Initiative #3

INVESTING IN THE FUTURE

We help the community evolve and grow.

Operational

The Library will also provide continued operational support for administrative, human resource, facility, technology, acquisition, and circulation services to maintain and improve public access to library resources.

State of Library Network

Servers – The library has transitions from local servers to Private Cloud and SaaS solutions.

Software as a Service - The library has transitioned to SaaS Solutions many of its core services including SirsiDynix (SD) Symphony, SD Enterprise, SD Web Services, SD Analytics, SD BlueCloud, SD Eres Central, BlackBaud Financial Edge NXT, PaperSave Cloud, BlueHost Word Press, Communico PDL Mobile, Communico Attend, Cisco Umbrella, DeepFreeze Cloud, Microsoft 365 - Windows, Office, AD Hybrid Services, Ninite Patching Services,

Private Cloud Hosted - The library has consolidated and has 5 virtualized servers on a private cloud hosted platform. Services included Microsoft AD Services, File and Print Services, Public Access AD services, MYPC application, PaperCut Printing Management, ePrintIt Mobile Services,

Network Infrastructure - Currently, the library has standardized on Meraki and Sophos equipment for switching and routing within its network, APC for uninterrupted power service and Panduit for physical connections. This equipment is responsible for keeping the core connectivity between our workstations, servers, SAN, and the outside world. The library has added Power over Ethernet (PoE) services to its switches for connecting PoE devices. The library also employs specialized network electronics to provide secure and authenticated wireless access for its public. As technology and its complexities grow, the library's technology must also follow suit. To this end, the library has upgraded its core switching from 10Mb to 100Mb to 1 GB to Multi-Gig over time in a pragmatic manner.

The Portage District Library maintains 2 Ethernet Virtual Circuits (EVCs). One circuit between the Portage District Library to Aunalytics. This EVC transports both network and internet traffic and is currently being used as the staff network's primary circuit. In 2022, a second fiber circuit was installed for redundancy, expanded internet connectivity and future growth. Also in 2022, the library upgraded its core switching to meet the ever-expanding bandwidth demands and devices at the library. Wireless access will also be addressed for both coverage (Library building and grounds) and density.

Staff Technology - Currently, the library has a mixture of desktops and laptops totaling more than 100 devices (workstations, laptops, and tablets) and has a standardized brand and model. This standardization reduces the TCO (total cost of operations) for the library and enables the library to employ a single network administrator. The library operates 2 networked laser printers and 6 color copier/printers for staff printing. These imaging units have been located strategically throughout the library for ease of use and need.

Public Access Technology - The public access computing side of the library's network includes catalog stations, internet access stations, circulating, creation stations, learning lab laptops circulating laptops, electronic signage displays, meeting room technology, and tablets. This mixture of desktops, laptops, tablets, and non-standard devices amounts to more than 90 access points for the public access device pool. The library operates 3 Color Laser Print Stations, a traditional copier, a Scan EZ Station for Copy/Print/USB/Smart Device/Email/Cloud Storage/Fax Cricut cutter, Laser Engraver, 3D printer, Dye-Sublimation Printer, large format printer, and numerous scanners and digitization devices.

Network Services

The Portage District Library's network is expected to maintain the following list of services:

- ❑ Integrated Library Automation Services
 - SD Symphony: Cataloging, Circulation, Acquisitions, Serials, MobileStaff
 - SD Enterprise Discovery Server: Internal Public Access, External Public Access, Enriched Content Services, Integrated Searching Services, eResources Central
 - SD Web Services Server
 - SD SIP and API Services: Authentication to Databases and E-Content
 - BlueCloud Analytics: Statistical Data from our Integrated Library System
 - Bibliotheca Self-Checkout, Auto Check-in, Digital Library Assistant
 - EZ- Proxy: Authenticated Access to Licensed Databases for Remote Access
 - Recollect: Local History Collections
- ❑ Public Access Computing Services
 - TBS MyPC – manages computer access for patrons
 - TBS PaperCut – manages vended public access printing
 - TBS ScanEZ (Library Document Station): Copy, Scan and Send Services (Copy, Fax, Smart Device, USB, Email, OneDrive, Google Drive, and Dropbox)
 - Cisco Umbrella: Public Access Filtering and Security Services.
 - Communico: Event and Room Booking
 - TBS EprintIt MobilePrint: printing from home or from patron device
 - Circulating Laptops for patron use throughout the library
 - Circulating Mobile Hotspots
 - Creation Station: PAC and MAC for digitization, Laptop Lab, iPads, Digitization Peripherals, Finishing/Output devices
- ❑ Edutainment Services:
 - Educational Computers
 - Digital Signage application offers the library a dynamic information portal for internal services
- ❑ Business Applications Services
 - 8x8 Cloud Hosted UCaaS
 - Business Productivity Applications: Microsoft/Office 365
 - Intranet Services: Microsoft Teams / SharePoint
 - Accounting Services: Blackbaud Financial Edge NXT Cloud, PaperSave Pro Cloud
 - FundRaising Services: Little Green Light
 - VirtualKeyPad Access Control
 - Ivu: HVAC Building Management Solution
 - IT Management: Software Update Services, Faronics Deepfreeze, Ninite Pro, AD Group Policies, Sophos AV, Veeam Backup and Replication, VMware Vcenter, vSphere
- ❑ Printing Services
 - The library offers both black/white & color printing services to both the public and the library staff.
 - The library offers a variety of printing/making services in its Creation Station Area.
- ❑ Internet Services
 - The library currently uses multiple dynamic fiber optic connections to the Internet. These access pipes are the most crucial tool for delivering library services. The library uses this connection to replicate its core network operations center as well as store backups.

Web Services

The following is a list of Web-Based Services that the library expects to maintain, develop and enhance:

- ❑ Library Website
 - A crucial service for all organizations today is their website. The library will focus on developing an application that is manageable by a wider spectrum of library staff and keeping content fresh and accurate. The focuses of this site will be (1) public access catalog for both traditional and e-material, (2) research resources including Internet links, research databases and interactive features between staff and patrons, and (3) library programs and events for ongoing personal development.
- ❑ Library Online Databases
 - Online Databases (EZProxy) is also a key focus for the library's image. Offering a broad array of accessible database content will continue to make the library a choice information provider.
- ❑ Library Public Access Catalog
 - The Public Access Catalog (Enterprise) allows patrons to search for and retrieve information on the library's holdings both in-house and remotely. This service has grown dramatically over the past three years and is expected to continue to develop. Enrichment tools like Novelist, Syndetics, Cover Art and Book Reviews have dramatically increased the usability, reader advisory services, and self-service discovery. The library will extend these functions to include access to local history resources through Recollect.
- ❑ Library E-Services
 - The library publishes an e-newsletter monthly to keep patrons informed about events at the library. The library also offers e-notices for holds/overdues/pre-due notices. The library also offers access to its local history resources through the RecollectCMS digitization project. In 2017, the library moved from a locally developed Summer Reading software product to a SaaS model provided by BeanStack.
- ❑ Library Events Calendar Online
 - Library Programs & Events are a popular service provided by the library and is managed by Communico, an online meeting room and event booking software.
- ❑ Library Study Rooms
 - Library Study Rooms are now managed by Communico and offer both walk-up and online reservations. Managing room usage allows the library to maximize their usage and share usage between staff and library patrons.
- ❑ Library Mobile Services
 - Library Information, Searching, Digital Content Access through mobile applications. The current Mobile Apps menu is Overdrive (Libby), Kanopy, Freegal, Tumble-Books, and Hoopla and these mobile/web apps are used for eMaterials. PDL Mobile (Communico) are mobile searching apps for the library catalog, E-material (Libby and Hoopla) and booking study rooms and attending library events.
- ❑ Library Social Media Services
 - The library is actively using Facebook and Twitter as marketing and communication tools for its traditional and digital services. These services have grown dramatically over the past 2 years and will continue to grow as the library operates its use with daily operation.

Evaluating Our Progress

The goals and objectives for Portage District Library's network and web design is reviewed on an ongoing basis through a combination of internal meetings of the administrative, social media, and departmental teams, as well as external meetings with network and web partners.

In addition to these teams, the library utilizes staff attendance at library and technical conferences to keep up to date on technological advancements in the library field. The library also schedules annual network security audits to address the library's progress toward securing its network borders and protecting its most valued asset "information."

Every year, the library's teams and the Library Systems Administrator make budget recommendations to the Library Director in the form of ongoing maintenance for current technology, budget requests to refresh existing technology and budget requests for technology upgrades. These annual reviews ensure appropriate budgets are available for library technology.

These internal and external meetings allow the library to make any necessary course corrections throughout the life of its technology. Applying these pragmatic plans create a more dynamic and responsive set of library technologies. Each year this living document will ebb and flow with the changing needs of technology at the Portage District Library.