



## Meeting Minutes

### Library Board

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Tuesday, March 10, 2026

5:00 PM

La Crosse Public Library  
Auditorium (Lower Level)

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#### Call to Order

*The Chair, Sue Anglehart, called the meeting to order at 5:00 p.m.*

*PRESENT: Jess Thill, Araysa Simpson, Aaron Engel (left at 5:32 p.m.), Sue Anglehart, Hannah Amann, Kathy Ivey, Erin Raymus (joined at 5:03 p.m.)*

*ABSENT: Mac Kiel, Rosanne Northwood*

*STAFF: Dawn Wacek, Daniel Whitmore, Cynthia Arauz, Brooke Newberry, Amber Leibundgut-Peterson, Miranda Greeno*

#### Agenda Items:

#### 1 Introduction of Library Board Member, Hannah Amann

*Ms. Anglehart introduced new Library Board member Hannah Amann. The Board expressed enthusiasm in welcoming her.*

#### 2 Approval of Minutes from Regular Board Meeting – February 10, 2026

**Motion to approve the minutes from the regular Board meeting of February 10, 2026.  
(Aaron Engel/Araysa Simpson) Carried**

#### 3 Approval of Minutes from Committee of the Whole – No Meeting March 3, 2026

#### 4 Approval of Bills & Financial Reports – February 2026

**Motion to approve the bills and financial reports from February 2026.  
(Aaron Engel/Jess Thill) Carried**

#### 5 Reports

*5.1 Director's Report  
5.11 Vacancy Report*

LPL welcomed Business Services Associate Tara Sagehorn, as well as Children & Families Assistants Ashley Burton and Dani Ehlinger. Frontline will be hiring three part-time Assistants following two recent staff departures and the transfer of Riley Davis to Resource Management to fill an open Assistant position.

An All-Staff Meeting will be held on Thursday, March 12. Brian Sampson, Homelessness Coordinator for the City, Molly McCormick, Community Risk Educator and HOT team member, and two neighborhood resource officers will speak at this meeting.

#### 5.12 Operations and Services Updates

The City is seeking community input through a Request for Expressions of Interest (REIF) to determine the future use of the North Community Library building. While a community group has expressed interest, final decisions will be made by the Common Council.

The City is beginning a strategic plan. Department Heads and the Common Council have held an initial meeting to discuss values, missions, and visions. Additional updates will follow.

An initial budget meeting was held. Department Heads were asked to prepare a two-year forecast of departmental costs and anticipated expenses. Health insurance costs are projected to increase by 10-12%. Budget reductions and potential use of fund balance to achieve a balanced budget are anticipated. Department Heads also proposed potential changes, including adding Cost-of-Living Adjustment (COLA) step immediately and improved accounting for overtime (OT) and retirement costs.

The Children & Families and Lifelong Learning teams have been reorganized under new Supervisors. Staff morale is positive as planning begins for Summer Library Program (SLP).

Operations Manager Cynthia Arauz is updating LPL's Staff Handbook and developing enhanced safety and security protocols.

Infrastructure Manager Daniel Whitmore continues to oversee construction wrap-up, the air handler installation scheduled for April, and post-construction staff relocations.

#### 5.13 Construction Update

A grand reopening event will be held tomorrow, March 11, in an open-house format, featuring hourly tours, light refreshments, and treats.

Awaiting electrical panel installation. Budget revisions were delayed due to missing paperwork related to Furniture Contract 5. Confirmation of the Flexible Facilities Program (FFP) grant budget adjustment is anticipated prior to the April Board meeting. The deadline for FFP grant expenditures is September.

The final furniture pieces of hold shelving and catalog stations are still pending delivery.

## 6 Old Business

**7 New Business**

*7.1 2025 Annual Report*

*The 2025 Annual Report reflects expected decreases in circulation and program attendance due to construction and partial building closure. Case studies of other libraries undergoing renovations indicate a significant decline during construction, followed by recovery and stabilization. An increase in 2026 metrics is anticipated.*

*Resource Management Supervisor Lindsay Schmitt has reported an early increase in new materials circulation following the introduction of marketplace displays.*

*7.2 Photo and Film Policy Approval*

*The Photo and Film Policy formalizes current practices and establishes guidelines for photography and filming while protecting patron privacy.*

*Board members requested a revision of terminology from “customers” to “patrons” within the policy.*

*7.3 Meeting Room Use Policy Approval*

*Revisions to the Meeting Room Use Policy are minor and primarily reflect the addition of new spaces and the removal of North Community Library meeting rooms. Fees and regulations remain unchanged.*

**Motion to approve the Photo and Film Policy with the noted revision.  
(Erin Raymus/Aaron Engel) Carried**

**8 Topics for Future Meetings**

**8.1 Fund Balance Update**

**8.2 By-laws Review**

**8.3 Planning Updates for North Closure**

**8.4 Feasibility Study Update**

**8.5 Organization Position Structure**

**9 Public Comment / Other**

**Adjournment**

*Adjournment at 5:38 p.m.*

**Motion to adjourn.  
(Erin Raymus/Jess Thill) Carried**

## LA CROSSE PUBLIC LIBRARY- FINANCIAL SUMMARY REPORT

March 2026

	Current Period	Year-to- Date	Percent of Budgeted Amount
<b><u>DISBURSEMENTS</u></b>			
City Operating Budget	\$457,321	\$1,127,103	21.45%
In-House Checking	\$15,459	\$56,351	
<b>Total Disbursements:</b>	<b>\$472,780</b>	<b>\$1,183,454</b>	
<b><u>RECEIPTS</u></b>			
Misc. Income	\$187,825	\$208,217	97.54%
WRLS Contract	\$0	\$0	0.00%
In-House Checking	\$6,780	\$44,978	
<b>Total Receipts:</b>	<b>\$194,605</b>	<b>\$253,195</b>	

25% of the year has elapsed


**LA CROSSE  
PUBLIC LIBRARY**

## RECEIPTS DEPOSITED THROUGH CITY HALL

March 2026

	Current Month Income	Year-to-Date Income	Budgeted Amount	% of Estimated Income for 2024
<b>MISC. INCOME</b>				
Over/Short				
Service Fees	\$14.55	\$153.04	\$0.00	
Damage to City Property	\$213.91	\$5,097.86	\$4,000.00	127.45%
Out of State Registration	\$140.00	\$1,851.78	\$2,500.00	74.07%
Misc. Fees and Fines	\$251.42	\$251.42	\$1,300.00	19.34%
County Contributions	\$187,204.58	\$200,669.00	\$200,668.00	100.00%
Pcard rebates	\$0.00	\$0.00	\$5,000.00	0.00%
Research Fees	\$0.00	\$193.75	\$0.00	
Restitution				
WRLSWEB				
<b>Subtotal Misc. Income</b>	<b>\$187,824.46</b>	<b>\$208,216.85</b>	<b>\$213,468.00</b>	<b>97.54%</b>
<b>INCOME FROM WRLS CONTRACT</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$22,654.00</b>	<b>0.00%</b>
<b>Total Income:</b>	<b>\$187,824.46</b>	<b>\$208,216.85</b>	<b>\$236,122.00</b>	<b>88.18%</b>
<b>City Allocation</b>			<b>\$5,020,236.00</b>	
<b>TOTAL BUDGETED INCOME:</b>			<b>\$5,233,704.00</b>	

## CITY OPERATING BUDGET REPORT

March 2026

	Budgeted Amount 2026	Current Period Expended	Year-to- Date Expended	% of Total Budget Expended	BALANCE
<b>GENERAL ADMINISTRATION</b>					
Salaries (+ \$135,000 unapplied COLA/Step)	\$3,082,891	\$237,920	\$599,069	19.43%	\$2,483,822
Cell phone reimbursement		\$170	\$352		(\$352)
Health Insurance	\$746,168	\$110,229	\$168,740	22.61%	\$577,428
Life Insurance	\$16,873	\$327	\$834	4.94%	\$16,039
Social Security/Medicare	\$244,282	\$17,528	\$44,055	18.03%	\$200,227
Wisconsin Retirement System	\$214,830	\$15,377	\$38,805	18.06%	\$176,025
Other Benefits	\$0	\$175	\$445		(\$445)
Contract Services	\$127,350	\$14,723	\$27,683	21.74%	\$99,667
Conference/Travel Expenses	\$10,000	\$455	\$3,362	33.62%	\$6,638
Telephone Expenses	\$23,000	\$1,259	\$3,410	14.83%	\$19,590
Electricity	\$105,169	\$5,394	\$10,498	9.98%	\$94,671
Water	\$5,038	\$462	\$462	9.16%	\$4,576
Natural Gas	\$45,089	\$7,438	\$12,598	27.94%	\$32,491
Sewer	\$5,578	\$632	\$632	11.34%	\$4,946
Storm Water	\$4,058	\$996	\$996	24.55%	\$3,062
Supplies	\$20,000	\$676	\$6,777	33.88%	\$13,223
Gasoline	\$1,000	\$51	\$120	11.97%	\$880
Postage	\$2,100	\$1,068	\$1,149	54.71%	\$951
Memberships/Subscriptions (WRLS WEB)	\$45,543	\$100	\$43,492	95.50%	\$2,051
Repair & Maintenance	\$82,985	\$11,529	\$29,649	35.73%	\$53,337
R&M Equipment Repair	\$0	\$0	\$204		(\$204)
<b>Sub Total:</b>	<b>\$4,781,954</b>	<b>\$426,508</b>	<b>\$993,332</b>	<b>20.77%</b>	<b>\$3,788,622</b>
<b>AUTOMATION</b>					
Computer Equipment/Software/Vendor	\$174,650	\$15,809	\$73,052	41.83%	\$101,598
<b>Sub Total:</b>	<b>\$174,650</b>	<b>\$15,809</b>	<b>\$73,052</b>	<b>41.83%</b>	<b>\$101,598</b>
<b>MATERIALS</b>					
Books and Publications	\$277,100	\$15,004	\$60,719	21.91%	\$216,381
<b>Sub Total:</b>	<b>\$277,100</b>	<b>\$15,004</b>	<b>\$60,719</b>	<b>21.91%</b>	<b>\$216,381</b>
<b>TOTAL BUDGET:</b>	<b>\$5,233,704</b>	<b>\$457,320</b>	<b>\$1,127,102</b>	<b>21.54%</b>	<b>\$4,106,602</b>
					<b>ITEM 3B</b>
<b>FUND BALANCE (formerly Carryover)</b>					
	<b>Amount</b>		<b>Expended</b>	<b>% Spent</b>	<b>Available</b>

Fund Balance into 2026	\$268,784.00				<b>Balance</b>
<b>Total available after expenditures - contingency:</b>	<b>\$218,785</b>				
<b>*Final 2026 fund balance will be calculated in April 2026 per city audit - amount listed is anticipated</b>					

**DETAIL - CITY OPERATING BUDGET**

March 2026

**GENERAL LIBRARY ADMINISTRATION****TRAINING/CONFERENCE REG - 1004010-521005**

Registration - M. Greeno	\$160.00	Power Up Conference
Registration - T. Dolbier	\$95.00	Greater Midwest Annual Education and Industry Expo
Registration - S. Brouwer	\$200.00	Midwest Archives Conference

**Memberships - 1004010-532075**

WRLS	\$100.00	SRLAAW membership
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**Employee Benefits - 1004010-511050**

Emplify Health	\$175.00	Pre-employment health screenings - CF (Ehlinger)
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**CONTRACTUAL SERVICES - 1004010-520110**

Marco	\$1,316.76	Printer service contract
Talon Protection Agency 2/1-2/28	\$12,782.15	Security services
WhenToWork	\$936.00	Scheduling contract

**REPAIR & MAINTENANCE - 1004010-540000**

Amazon	\$342.49	Wipe dispenser, actuator, V-belt
Bob's Lock & Safe	\$37.50	Keys
Good as New Carpet Cleaning	\$948.75	Main hall and main stairs carpet cleaning
Kish & Sons Electric	\$2,356.00	Dimming switch addition
Market & Johnson	\$4,000.00	Wall skim coating
Menards		Fan, dust pan, painting supplies, toilet repair supplies, 2nd floor
	\$642.75	finishing supplies
Schilling	\$245.46	Trash bags, mop handle, cleaning supplies
Sherwin Williams	\$53.95	Painting supplies
Solid Waste Dept.	\$66.35	Trash load
Tractor Central	\$56.82	Lawn mower housing & bearing
UniFirst	\$165.51	Mats, mops, uniforms, & rags
Winona Controls	\$2,641.58	Air handler 3 cooling coil repair, 1st floor VAV repair

**SUPPLIES/MISC - 1004010-532000**

Amazon	\$783.82	Shelf tag holders, name tags, laminating pouches, cardstock, tape dispenser, label holders, notebooks, ibuprofen, surge protectors, batteries, network adapter, stapler, file folders, tape dispensers, sign holder return, tape, suction cups, vacuum, ice packs, laminator
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**TELEPHONE - 1004010-521101**

Brightspeed	\$480.08	Analog phone service
Lumen	\$2.11	Long distance charges
Nextiva	\$730.17	Phone service
Verizon	\$46.25	Cell phone service

**GASOLINE - 1004010-532055**

Kwik Trip	\$50.72	Gasoline
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**POSTAGE - 1004010 - 532060**

Quadient	\$1,068.03	Postage
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**AUTOMATION**

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**COMPUTER EQUIPMENT/SOFTWARE - 1004010-533010**

1st Business Solutions, Inc	\$1,107.80	Archives data wiring
Adobe	\$244.93	Creative Cloud all apps Computer cables, headphones, ethernet adapters, surge protectors, computer cables, cable organizers, Apple Care,
Amazon	\$1,293.72	ethernet network card
CCB Technology	\$8,280.00	Microsoft Office renewal
CDW	\$2,745.50	Helpdesk software
EO Johnson	\$800.00	Firewalls
GoDaddy	\$46.38	Website domain name registration
Microsoft	\$752.50	Office 365
PDQ	\$1,402.50	Deployment software
Userway	\$490.00	AI widget
WICTRA	\$800.00	Cybersecurity membership

**IN-HOUSE CHECKING REPORT**  
March 2026

**RECEIPTS:**1400 ACCOUNT

\$1,015.26  
\$1,015.26

3400 ACCOUNT3400 Purpose of Gift

Cash donations	\$23.50	Archives
Cash donations	\$92.85	Create Lab
Cash donations	\$62.51	Discretionary
Tote Sales	\$26.00	Fundraising
LCHS donation for Enduring Families presentation MM@M	\$100.00	G. Gordon
M. Stolder in honor of FOL board members Ann Keuper, Beth Sciborski, Margaret Fleming	\$1,000.00	M N-F
\$1000 M. Greenewald donation, \$70.65 WI Dept of Revenue refund, \$250 Tom and Judy Sleik Family Fund, \$1050 Dr. Gunnar and Mary Baldwin Gundersen Memorial Fund, \$100 Gillette Pepsi Company	\$2,470.65	Misc.
PayPal - Threadless sales - credit card transfer	\$11.46	Pantry
Cash donations	\$18.00	Archives
LCSD - North book bins	\$900.00	Programming - Children's room
Cash donations	\$9.01	Discretionary
Cash donations	\$18.09	Pantry
Tote Sales	\$14.00	Fundraising
A. Keuper in honor of FOL board member Mary Ellen Stolder	\$150.00	M N-F
	\$4,896.07	

4400 ACCOUNT

**Total Receipts: \$5,911.33**

**DISBURSEMENTS:**3400 ACCOUNT3400 Source of Funds - Item Purchased

Trevipay - Walmart	\$ 79.82	CF - snacks, gem sheets Pantry \$345.67 (peanut butter, granola bars, water bottles, crackers, hot cocoa, green tea, hand warmers, plastic spoons, body wipes); Creation Space \$93.69 (Apple iPad charger, four leaf clover craft supplies) -\$28.46 (Apple iPad charger return/refund); Children & Families \$201.35 (pipettes, bracelet making supplies, construction paper, super glue, D&D miniature making supplies, rings, glass bottles); Lifelong Learning \$290.35 (BookTok Bingo books)
Cardmember Services	\$ 902.60	Lifelong Learning \$383.11 (program snacks, Decorative Beaded Plants program supplies, state park passes); Miscellaneous \$399.62 (custom neon sign, Wisconsin Department of Revenue payment) - \$12.85 (Etsy purchase tax refund); Children & Families \$106.06 (dragon coin bank, Perler beads, stickers); General Programming \$161.90 (Mailchimp, Zoom, Spotify); Pantry \$264.78 (Kwik Trip gift card for produce purchasing, oatmeal, granola bars, foam cups, lotion, shampoo); Creation Space \$98.26 (iPad cases)
Cardmember Services	\$ 1,400.88	
WRLS	\$ 14.97	LL - winter reading challenge mugs
Market & Johnson	\$ 7,700.00	Archives - skim coating
Child Abuse Prevention Task Force	\$ 50.00	CF - Summer tabling event
Murray Mueller	\$ 100.00	G. Gordon - check reissue Boggle Poetry 3/12
Chad Lewis	\$ 300.00	G. Gordon - MM@M - WI Circus Legends & Lore
Joan Filla	\$ 100.00	LL - Singing Bowl Meditation 4/9
Jamie Pedretti	\$ 500.00	G. Gordon - 4 weeks of chair yoga and fitness
Bernice Olson-Pollack	\$ 70.00	G. Gordon - 4/4 Qigong class
Library Furniture International	\$ 4,129.61	Discretionary - OPAC furniture deposit
Walmart - Trevipay	\$ 22.13	CF - Children's program supplies (wood dowels, googly eyes, poms)
	\$15,370.01	

4400 ACCOUNT

**Total Disbursements: \$15,370.01**

**IN-HOUSE CHECKING REPORT**  
March 2026

**RECEIPTS:**

**1400 ACCOUNT**

\$1,015.26  
\$1,015.26

**3400 ACCOUNT**

**3400 Purpose of Gift**

Cash donations	\$23.50	Archives
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Cash donations	\$18.00	Archives
LCSD - North book bins	\$900.00	Programming - Children's room
Cash donations	\$9.01	Discretionary
Cash donations	\$18.09	Pantry
Tote Sales	\$14.00	Fundraising
A. Keuper in honor of FOL board member Mary Ellen Stolder	\$150.00	M N-F
	<u>\$4,896.07</u>	

**4400 ACCOUNT**

**Total Receipts: \$5,911.33**

**DISBURSEMENTS:**

**3400 ACCOUNT**

**3400 Source of Funds - Item Purchased**

Trevipay - Walmart	\$ 79.82	CF - snacks, gem sheets Pantry \$345.67 (peanut butter, granola bars, water bottles, crackers, hot cocoa, green tea, hand warmers, plastic spoons, body wipes); Creation Space \$93.69 (Apple iPad charger, four leaf clover craft supplies) -\$28.46 (Apple iPad charger return/refund); Children & Families \$201.35 (pipettes, bracelet making supplies, construction paper, super glue, D&D miniature making supplies, rings, glass bottles); Lifelong Learning \$290.35 (BookTok Bingo books)
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	<u>\$15,370.01</u>	

**4400 ACCOUNT**

**Total Disbursements: \$15,370.01**

## GIFT FUND (RESTRICTED) AS OF 4/1/2026

March 2026

	4/1/2026 Balance	YTD Debits	YTD Credits	Current Balance
<b>Library Materials</b>				
Regional Read	\$1,196.00	\$0.00	\$0.00	\$1,196.00
<b>Subtotal:</b>	\$1,196.00	\$0.00	\$0.00	\$1,196.00
<b>Miscellaneous</b>				
Archives	\$35,766.67	\$11,896.37	\$41.50	\$23,911.80
Creation Space	\$3,604.57	\$1,487.33	\$2,634.90	\$4,752.14
Discretionary (Equipment/Furniture)	\$9,782.87	\$4,129.61	\$71.52	\$5,724.78
Friends	\$2,923.64	\$0.00	\$3,500.00	\$6,423.64
Fundraising	\$32,287.42	\$15,000.00	\$1,367.74	\$18,655.16
Donald (Sandy) Gordon Estate	\$12,489.55	\$0.00	\$3,470.91	\$15,960.46
Gertrude Salzer Gordon Estate	\$24,572.98	\$2,847.50	\$9,031.37	\$30,756.85
Medora Nelson-Ferris	\$21,275.00	\$0.00	\$1,150.00	\$22,425.00
Misc.	\$4,057.72	\$402.98	\$2,896.36	\$6,551.10
Misc. - Art Fund	\$759.16	\$0.00	\$0.00	\$759.16
Misc. - Banner Project	\$3,010.54	\$0.00	\$0.00	\$3,010.54
Misc. - Mobile Library	\$4,011.49	\$0.00	\$0.00	\$4,011.49
North Enhancements	\$35,950.00	\$0.00	\$0.00	\$35,950.00
Pantry	\$5,163.02	\$869.55	\$85.56	\$4,379.03
Programming - General	\$316.73	\$322.75	\$1,000.00	\$993.98
Programming - Lifelong Learning	\$807.98	\$1,169.70	\$4,000.00	\$3,638.28
Programming - Children & Families	\$3,196.63	\$2,242.44	\$10,379.34	\$11,333.53
Programming - LACF Grant - Podcast Supplies	\$909.24	\$0.00	\$0.00	\$909.24
Programming - YS Misc	\$2,442.87	\$379.34	\$900.00	\$2,963.53
Spec. Trustees - General	\$1,001.00	\$0.00	\$0.00	\$1,001.00
Spec. Trustees - Board Retreat	\$0.00	\$0.00	\$0.00	\$0.00
Spec. Trustees - Main Space Audit	-\$271.84	\$0.00	\$0.00	-\$271.84
Spec. Trustees - Retirements	-\$600.00	\$0.00	\$600.00	\$0.00
Spec. Trustees - D. Wacek Open House	-\$500.00	\$0.00	\$500.00	\$0.00
Tool Library	\$889.08	\$0.00	\$0.00	\$889.08
Washburn	\$13,446.29	\$4,536.68	\$0.00	\$8,909.61
<b>Subtotal:</b>	\$217,292.61	\$45,284.25	\$41,629.20	\$213,637.56
<b>YTD TOTALS</b>				
	<b>\$218,488.61</b>	<b>\$45,284.25</b>	<b>\$41,629.20</b>	<b>\$214,833.56</b>
<b>BANK BALANCE</b>				
				<b>\$214,793.50</b>

**LA CROSSE PUBLIC LIBRARY TRUSTEES  
SPECIAL FUND AGENCY**

Statement of Receipts & Expenditures  
For Quarter Ended March 31, 2026

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<b>BALANCE 12-31-2025</b>		<b>\$1,095,142.92</b>
<b><u>INCOME</u></b>		<b>(\$2,632.26)</b>
Revenue	\$11,482.96	
Disbursements	(\$3,147.48)	
Realized Gain/Loss	\$1,506.78	
Change in Market Value	(\$12,474.52)	
<b><u>EXPENDITURES</u></b>		<b>\$0.00</b>
Fees	\$0.00	
<b>BALANCE 3-31-2026</b>		<b>\$1,092,510.66</b>

## ACCOUNT STATEMENT

ACCOUNT NUMBER: **1045001021**  
JANUARY 01, 2026 TO MARCH 31, 2026

TRUST POINT WEB PORTAL STATEMENT

ACCOUNT NAME: **LA CROSSE PUBLIC LIBRARY  
TRUSTEES SPECIAL FUND AGENCY**

FINANCIAL TEAM: **JENNIFER GANDER  
608-791-2273  
jgander@trustpointinc.com**

PORTFOLIO MANAGER: **YAN ARSENAULT  
608-791-2279  
yarsenault@trustpointinc.com**



Are you tired of paper statements? Contact your Relationship Manager to receive electronic statements.

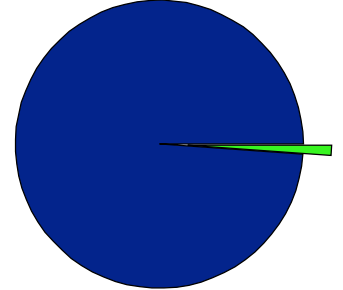
### ACTIVITY SUMMARY

	THIS PERIOD	YEAR TO DATE
<b>BEGINNING MARKET VALUE</b>	<b>1,095,142.92</b>	<b>1,095,142.92</b>
INCOME	11,482.96	11,482.96
DISBURSEMENTS	3,147.48-	3,147.48-
REALIZED GAIN/LOSS	1,506.78	1,506.78
CHANGE IN MARKET VALUE	12,474.52-	12,474.52-
<b>ENDING MARKET VALUE</b>	<b>1,092,510.66</b>	<b>1,092,510.66</b>

ACCOUNT NUMBER: **1045001021**  
 JANUARY 01, 2026 TO MARCH 31, 2026

**ASSET ALLOCATION**

MARKET VALUE AS OF	01/01/2026	03/31/2026	% OF ACCOUNT
 <b>BOND FUNDS</b>	1,082,844.97	1,078,915.44	98.8%
 <b>CASH AND EQUIVALENTS</b>	12,297.95	13,595.22	1.2%
<b>Total</b>	<b>1,095,142.92</b>	<b>1,092,510.66</b>	<b>100.0%</b>



ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2026 TO MARCH 31, 2026

**ASSET STATEMENT**

DESCRIPTION		MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD		
<b>CASH AND EQUIVALENTS</b>							
31607A703 FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO		13,595.22	1.00	485.35	3.57		
CASH		0.00					
<b>TOTAL CASH AND EQUIVALENTS</b>		<b>13,595.22</b>		<b>485.35</b>	<b>3.57</b>		
		<b>13,595.22</b>		<b>40.45</b>			
DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD	
<b>BOND FUNDS</b>							
024525727 AMERICAN BEACON DEVELOPING WORLD INCOME Y		AGEYX	9,925.203	75,133.79 76,517.58	7.57 7.71	7,394.28	9.84
04314H568 ARTISAN HIGH INCOME I		APHFX	6,043.849	54,152.89 55,361.66	8.96 9.16	3,862.02 321.84	7.13
316146356 FIDELITY U.S. BOND INDEX FUND		FXNAX	42,840.868	448,543.89 489,631.99	10.47 11.43	16,365.21 1,363.77	3.65
31635T104 FIDELITY INFLATION-PROTECTED BOND INDEX FUND		FIPDX	6,042.359	55,287.58 54,622.92	9.15 9.04	2,302.14 191.85	4.16
46432F859 ISHARES CORE 1-5 YEAR BOND ETF		ISTB	1,589.000	77,002.94 75,280.45	48.46 47.38	3,220.90	4.18
72201F490 PIMCO INCOME FUND I		PIMIX	27,078.437	291,905.55 298,720.85	10.78 11.03	17,682.22 1,473.52	6.06
92206C755 VANGUARD MORTGAGE-BACKED SECURITIES INDEX		VMBSX	4,098.550	76,888.80 86,266.74	18.76 21.05	3,237.85	4.21
<b>TOTAL BOND FUNDS</b>				<b>1,078,915.44</b>		<b>54,064.62</b>	<b>5.01</b>
				<b>1,136,402.19</b>		<b>3,350.98</b>	
<b>GRAND TOTAL ASSETS</b>				<b>1,092,510.66</b>		<b>54,549.97</b>	<b>4.99</b>
				<b>1,149,997.41</b>		<b>3,391.43</b>	

ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2026 TO MARCH 31, 2026

**TRANSACTION STATEMENT**

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
01/01/26	<b>BEGINNING BALANCE</b>	216,094.96-	216,094.96	1,140,155.15	
	<b>AMERICAN BEACON DEVELOPING WORLD INCOME Y</b>				
01/02/26	DIVIDEND ON 10,242.249 SHS AT .0629 PER SHARE PAYABLE 12/31/2025 TAX EFFECTIVE 12/31/2025		644.24		
02/03/26	DIVIDEND ON 10,242.249 SHS AT .0688 PER SHARE PAYABLE 02/02/2026		704.67		
02/17/26	SOLD 317.046 SHS ON 02/13/2026 AT 7.84	2,485.64		2,758.30-	272.66-
03/03/26	DIVIDEND ON 9,925.203 SHS AT .054 PER SHARE PAYABLE 03/02/2026		535.96		
02/17/26	<b>ARTISAN HIGH INCOME I</b> PURCHASED 6,043.849 SHS ON 02/13/2026 AT 9.16	55,361.66-		55,361.66	
03/04/26	INTEREST PAYABLE 03/02/2026		117.54		
	<b>FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO</b>				
01/02/26	INTEREST PAYABLE 01/02/2026 TAX EFFECTIVE 12/31/2025		53.75		
02/02/26	INTEREST PAYABLE 02/02/2026		46.29		
03/02/26	INTEREST PAYABLE 03/02/2026		40.37		
	NET CASH MANAGEMENT	1,297.27-		1,297.27	
	<b>FIDELITY U.S. BOND INDEX FUND</b>				
01/02/26	INTEREST PAYABLE 01/02/2026 TAX EFFECTIVE 12/31/2025		1,279.97		
02/02/26	INTEREST PAYABLE 02/02/2026		1,288.83		
02/17/26	PURCHASED 4,011.358 SHS ON 02/13/2026 AT 10.66	42,761.08-		42,761.08	
03/02/26	INTEREST PAYABLE 03/02/2026		1,242.00		
	<b>FIDELITY INFLATION-PROTECTED BOND INDEX FUND</b>				
02/17/26	SOLD 3,352.527 SHS ON 02/13/2026 AT 9.24	30,977.35		30,368.01-	609.34
	<b>ISHARES CORE 1-5 YEAR BOND ETF</b>				
02/05/26	DIVIDEND ON 2,807 SHS AT .172362 PER SHARE PAYABLE 02/05/2026		483.82		
02/17/26	SOLD 1,218 SHS ON 02/13/2026 AT 48.93 THRU CLEAR STREET LLC COMMISSIONS PAID 19.49	59,577.25		58,407.15-	1,170.10

ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2026 TO MARCH 31, 2026

**TRANSACTION STATEMENT ( CONTINUED )**

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
03/05/26	DIVIDEND ON 1,589 SHS AT .165647 PER SHARE PAYABLE 03/05/2026		263.21		
01/05/26	<b>PIMCO INCOME FUND I</b> INTEREST PAYABLE 01/02/2026 TAX EFFECTIVE 12/31/2025		1,472.90		
02/03/26	INTEREST PAYABLE 02/02/2026		1,481.30		
02/17/26	PURCHASED 140.164 SHS ON 02/13/2026 AT 11.09	1,554.42-		1,554.42	
03/04/26	INTEREST PAYABLE 03/02/2026		1,299.13		
02/03/26	<b>VANGUARD MORTGAGE-BACKED SECURITIES INDEX</b> DIVIDEND ON 4,077.474 SHS AT .0652 PER SHARE PAYABLE 02/03/2026		265.85		
02/17/26	PURCHASED 21.076 SHS ON 02/13/2026 AT 19.04	401.29-		401.29	
03/03/26	DIVIDEND ON 4,098.55 SHS AT .0642 PER SHARE PAYABLE 03/03/2026		263.13		
02/03/26	ACH DISTRIBUTION TO STATE BANK FINANCIAL CHECKING ACCT DISTRIBUTION PER CLIENT REQUEST	1,100.00-			
	NET TRUST POINT FEE FOR THE PERIOD	1,023.74-	1,023.74-		
<b>03/31/26</b>	<b>ENDING BALANCE</b>	<b>226,554.18-</b>	<b>226,554.18</b>	<b>1,149,997.41</b>	<b>1,506.78</b>

For your protection, orders or instructions regarding your account will not be accepted via voicemail or email. Please contact a member of your Financial Team if you have questions or instructions related to your account.

**LA CROSSE PUBLIC LIBRARY TRUSTEES  
TRUST UNDER THE WILL OF  
DONALD A. GORDON, JR.**

Statement of Receipts & Expenditures  
For Quarter Ended March 31, 2026

<b>BALANCE 12-31-2025</b>		<b>\$265,416.59</b>
<b><u>INCOME</u></b>		<b>(\$9,944.75)</b>
Contributions	\$0.00	
Income	\$1,041.23	
Disbursements	(\$4,300.17)	
Realized Gain/Loss	\$13,431.27	
Change in Market Value	(\$20,117.08)	
<b><u>EXPENDITURES</u></b>		<b>\$0.00</b>
Fees	\$0.00	
<b>BALANCE 3-31-2026</b>		<b>\$255,471.84</b>

## ACCOUNT STATEMENT

ACCOUNT NUMBER: **1045000228**  
 JANUARY 01, 2026 TO MARCH 31, 2026




### TRUST POINT WEB PORTAL STATEMENT

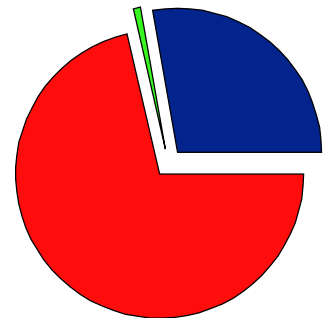
ACCOUNT NAME:	<b>DONALD A. GORDON, JR. PRIVATE FOUNDATION FBO LA CROSSE PUBLIC LIBRARY</b>
FINANCIAL TEAM:	<b>CHERIE RIFENBERG 608-791-2277 crifenberg@trustpointinc.com</b>
FINANCIAL TEAM:	<b>LAURA CAMPBELL 612-416-3884 lcampbell@trustpointinc.com</b>
PORTFOLIO MANAGER:	<b>YAN ARSENAULT 608-791-2279 yarsenault@trustpointinc.com</b>

## ACTIVITY SUMMARY

	THIS PERIOD	YEAR TO DATE
<b>BEGINNING MARKET VALUE</b>	<b>265,416.59</b>	<b>265,416.59</b>
INCOME	1,041.23	1,041.23
DISBURSEMENTS	4,300.17-	4,300.17-
REALIZED GAIN/LOSS	13,431.27	13,431.27
CHANGE IN MARKET VALUE	20,117.08-	20,117.08-
<b>ENDING MARKET VALUE</b>	<b>255,471.84</b>	<b>255,471.84</b>

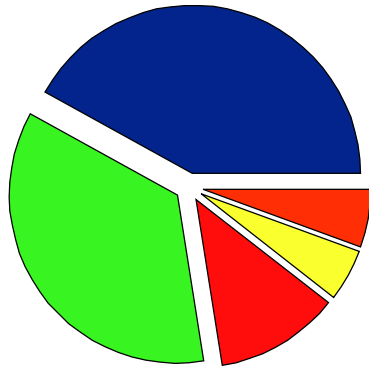
## ASSET ALLOCATION

MARKET VALUE AS OF	01/01/2026	03/31/2026	% OF ACCOUNT
 <b>BOND FUNDS</b>	65,275.97	70,611.13	27.6%
 <b>CASH AND EQUIVALENTS</b>	10,944.03	2,415.34	0.9%
 <b>EQUITY</b>	189,196.59	182,445.37	71.5%
<b>Total</b>	<b>265,416.59</b>	<b>255,471.84</b>	<b>100.0%</b>



ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2026 TO MARCH 31, 2026

**ASSET STATEMENT**
**EQUITY DIVERSIFICATION SUMMARY**


INDUSTRY CODE	MARKET VALUE	PERCENT
INTERNATIONAL EQUITY	76,761.81	42.1%
LARGE CAP EQUITY	64,787.66	35.5%
MID CAP EQUITY	21,558.18	11.8%
OTHER EQUITY FUNDS	9,306.00	5.1%
SMALL CAP EQUITY	10,031.72	5.5%
<b>Total</b>	<b>182,445.37</b>	<b>100.0%</b>

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
<b>EQUITY</b>						
<b>INTERNATIONAL EQUITY</b>						
00771X419 GQG PARTNERS EMERGING MARKETS EQUITY I	GQGIX	557.591	10,142.58 9,711.19	18.19 17.42	211.33	2.08
00775Y207 ARGA EMERGING MARKETS VALUE FUND	ARMIX	836.982	12,730.50 8,992.20	15.21 10.74	382.50	3.00
413838574 OAKMARK INTERNATIONAL R6	OAZIX	996.825	30,233.70 26,543.74	30.33 26.63	703.76 58.65	2.33
47803N448 JHANCOCK INTERNATIONAL DYNAMIC GR R6	JIJRX	1,477.516	23,655.03 25,782.65	16.01 17.45	193.55	0.82
<b>TOTAL INTERNATIONAL EQUITY</b>		<b>SUB-TOTAL</b>	<b>76,761.81</b> <b>71,029.78</b>		<b>1,491.14</b> <b>58.65</b>	<b>1.94</b>
<b>LARGE CAP EQUITY</b>						
921908844 VANGUARD DIVIDEND APPRECIATION ETF	VIG	47.000	10,107.82 6,995.36	215.06 148.84	162.34	1.61
922908579 VANGUARD LARGE CAP INDEX ADM	VLCAx	262.120	39,559.15 15,589.79	150.92 59.48	444.03	1.12
97717Y477 WISDOMTREE US QUALITY GROWTH ETF	QGRW	283.000	15,120.69 11,678.66	53.43 41.27	14.15	0.09
<b>TOTAL LARGE CAP EQUITY</b>		<b>SUB-TOTAL</b>	<b>64,787.66</b> <b>34,263.81</b>		<b>620.52</b> <b>0.00</b>	<b>0.96</b>

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2026 TO MARCH 31, 2026

**ASSET STATEMENT ( CONTINUED )**

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
<b>MID CAP EQUITY</b>						
78464A698 STATE STREET SPDR S&P REGIONAL BANKING ETF	KRE	56.000	3,648.40 3,957.06	65.15 70.66	88.14	2.42
921932844 VANGUARD S&P MID CAP 400 VALUE INDEX ETF	IVOV	62.000	6,320.90 6,744.73	101.95 108.79	114.14	1.81
922908645 VANGUARD MID CAP INDEX ADMIRAL	VIMAX	32.575	11,588.88 8,773.94	355.76 269.35	173.33	1.50
<b>TOTAL MID CAP EQUITY</b>		<b>SUB- TOTAL</b>	<b>21,558.18 19,475.73</b>		<b>375.61 0.00</b>	<b>1.74</b>
<b>OTHER EQUITY FUNDS</b>						
378690580 GLENMEDE SECURED OPTIONS I	GLSOX	664.714	9,306.00 7,644.79	14.00 11.50	40.55	0.44
<b>TOTAL OTHER EQUITY FUNDS</b>		<b>SUB- TOTAL</b>	<b>9,306.00 7,644.79</b>		<b>40.55 0.00</b>	<b>0.44</b>
<b>SMALL CAP EQUITY</b>						
207019704 CONESTOGA SMALL CAP INST	CCALX	58.001	3,680.16 3,428.04	63.45 59.10		
969251487 WILLIAM BLAIR SMALL CAP VALUE CLASS I	ICSCX	204.691	6,351.56 5,418.89	31.03 26.47	49.13 4.09	0.77
<b>TOTAL SMALL CAP EQUITY</b>		<b>SUB- TOTAL</b>	<b>10,031.72 8,846.93</b>		<b>49.13 4.09</b>	<b>0.49</b>
<b>TOTAL EQUITY</b>			<b>182,445.37 141,261.04</b>		<b>2,576.95 62.74</b>	<b>1.41</b>
DESCRIPTION			MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
<b>CASH AND EQUIVALENTS</b>						
31607A703 FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO			2,415.34 2,415.34	1.00 1.00	86.23 7.19	3.57
CASH			0.00			
<b>TOTAL CASH AND EQUIVALENTS</b>			<b>2,415.34 2,415.34</b>		<b>86.23 7.19</b>	<b>3.57</b>

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2026 TO MARCH 31, 2026

**ASSET STATEMENT ( CONTINUED )**

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
<b>BOND FUNDS</b>						
024525727 AMERICAN BEACON DEVELOPING WORLD INCOME Y	AGEYX	1,042.529	7,891.94 7,908.94	7.57 7.59	776.68	9.84
04314H568 ARTISAN HIGH INCOME I	APHFX	591.923	5,303.63 5,427.93	8.96 9.17	378.24 31.52	7.13
316146356 FIDELITY U.S. BOND INDEX FUND	FXNAX	2,431.767	25,460.60 25,667.17	10.47 10.55	928.93 77.41	3.65
46432F859 ISHARES CORE 1-5 YEAR BOND ETF	ISTB	111.000	5,379.06 5,271.35	48.46 47.49	225.00	4.18
72201F490 PIMCO INCOME FUND I	PIMIX	1,966.059	21,194.12 21,957.09	10.78 11.17	1,283.84 106.99	6.06
92206C755 VANGUARD MORTGAGE-BACKED SECURITIES INDEX	VMBSX	286.875	5,381.78 5,340.74	18.76 18.62	226.63	4.21
<b>TOTAL BOND FUNDS</b>			<b>70,611.13</b> <b>71,573.22</b>		<b>3,819.32</b> <b>215.92</b>	<b>5.41</b>
<b>GRAND TOTAL ASSETS</b>			<b>255,471.84</b> <b>215,249.60</b>		<b>6,482.50</b> <b>285.85</b>	<b>2.54</b>

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2026 TO MARCH 31, 2026

**TRANSACTION STATEMENT**

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
01/01/26	<b>BEGINNING BALANCE</b>	3,320.44-	3,320.44	205,077.27	
	<b>GQG PARTNERS EMERGING MARKETS EQUITY I</b>				
02/13/26	PURCHASED 50,142 SHS ON 02/12/2026 AT 19.36	970.75-		970.75	
	<b>ARGA EMERGING MARKETS VALUE FUND</b>				
02/13/26	PURCHASED 110,804 SHS ON 02/12/2026 AT 16.10	1,783.95-		1,783.95	
	<b>AMERICAN BEACON DEVELOPING WORLD INCOME Y</b>				
01/02/26	DIVIDEND ON 1,055,516 SHS AT .0629 PER SHARE PAYABLE 12/31/2025 TAX EFFECTIVE 12/31/2025		66.39		
02/03/26	DIVIDEND ON 1,055,516 SHS AT .0688 PER SHARE PAYABLE 02/02/2026		72.62		
02/13/26	SOLD 12,987 SHS ON 02/12/2026 AT 7.83	101.69		111.18-	9.49-
03/03/26	DIVIDEND ON 1,042,529 SHS AT .054 PER SHARE PAYABLE 03/02/2026		56.30		
	<b>ARTISAN HIGH INCOME I</b>				
02/13/26	PURCHASED 591,923 SHS ON 02/12/2026 AT 9.17	5,427.93-		5,427.93	
03/04/26	INTEREST PAYABLE 03/02/2026		12.52		
	<b>CONESTOGA SMALL CAP INST</b>				
02/13/26	PURCHASED 6,676 SHS ON 02/12/2026 AT 68.86	459.72-		459.72	
	<b>AMERICAN FUNDS EUPAC FUND CL F3</b>				
02/13/26	SOLD 366,021 SHS ON 02/12/2026 AT 64.31	23,538.81		16,905.06-	6,633.75
	<b>FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO</b>				
01/02/26	INTEREST PAYABLE 01/02/2026 TAX EFFECTIVE 12/31/2025		23.64		
02/02/26	INTEREST PAYABLE 02/02/2026		24.82		
03/02/26	INTEREST PAYABLE 03/02/2026		12.72		
	<b>NET CASH MANAGEMENT</b>	8,528.69		8,528.69-	
	<b>FIDELITY U.S. BOND INDEX FUND</b>				
01/02/26	INTEREST PAYABLE 01/02/2026 TAX EFFECTIVE 12/31/2025		60.44		
02/02/26	INTEREST PAYABLE 02/02/2026		60.64		

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2026 TO MARCH 31, 2026

**TRANSACTION STATEMENT ( CONTINUED )**

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
02/13/26	PURCHASED 604.874 SHS ON 02/12/2026 AT 10.64	6,435.86-		6,435.86	
03/02/26	INTEREST PAYABLE 03/02/2026		66.55		
	<b>FIDELITY INFLATION-PROTECTED BOND INDEX FUND</b>				
02/13/26	SOLD 508.385 SHS ON 02/12/2026 AT 9.23	4,692.39		4,595.80-	96.59
	<b>GLENMEDE SECURED OPTIONS I</b>				
02/13/26	SOLD 133.939 SHS ON 02/12/2026 AT 14.17	1,897.91		1,546.88-	351.03
	<b>OAKMARK INTERNATIONAL R6</b>				
02/13/26	SOLD 37.214 SHS ON 02/12/2026 AT 33.96	1,263.80		1,013.34-	250.46
	<b>ISHARES CORE 1-5 YEAR BOND ETF</b>				
02/05/26	DIVIDEND ON 192 SHS AT .172362 PER SHARE PAYABLE 02/05/2026		33.09		
02/13/26	SOLD 81 SHS ON 02/12/2026 AT 48.8605 THRU TD SECURITIES (USA) LLC COMMISSIONS PAID 1.30	3,956.40		3,863.30-	93.10
03/05/26	DIVIDEND ON 111 SHS AT .165647 PER SHARE PAYABLE 03/05/2026		18.39		
	<b>JHANCOCK INTERNATIONAL DYNAMIC GR R6</b>				
02/13/26	PURCHASED 1,477.516 SHS ON 02/12/2026 AT 17.45	25,782.65-		25,782.65	
	<b>PIMCO INCOME FUND I</b>				
01/05/26	INTEREST PAYABLE 01/02/2026 TAX EFFECTIVE 12/31/2025		96.36		
02/03/26	INTEREST PAYABLE 02/02/2026		96.34		
02/13/26	PURCHASED 214.066 SHS ON 02/12/2026 AT 11.07	2,369.71-		2,369.71	
03/04/26	INTEREST PAYABLE 03/02/2026		90.54		
	<b>STATE STREET SPDR S&amp;P REGIONAL BANKING ETF</b>				
02/13/26	PURCHASED 56 SHS ON 02/12/2026 AT 70.6458 THRU TD SECURITIES (USA) LLC COMMISSIONS PAID 0.90	3,957.06-		3,957.06	
03/25/26	DIVIDEND ON 56 SHS AT .364261 PER SHARE PAYABLE 03/25/2026		20.40		

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2026 TO MARCH 31, 2026

**TRANSACTION STATEMENT ( CONTINUED )**

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
	<b>VANGUARD DIVIDEND APPRECIATION ETF</b>				
02/13/26	SOLD 73 SHS ON 02/12/2026 AT 227.4258 THRU CLEAR STREET LLC COMMISSIONS PAID 1.17	16,600.92		10,619.40-	5,981.52
03/31/26	DIVIDEND ON 47 SHS AT .8334 PER SHARE PAYABLE 03/31/2026		39.17		
	<b>VANGUARD S&amp;P MID CAP 400 VALUE INDEX ETF</b>				
02/13/26	PURCHASED 62 SHS ON 02/12/2026 AT 108.77 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 0.99	6,744.73-		6,744.73	
	<b>VANGUARD MORTGAGE-BACKED SECURITIES INDEX</b>				
02/03/26	DIVIDEND ON 252.145 SHS AT .0652 PER SHARE PAYABLE 02/03/2026		16.44		
02/13/26	PURCHASED 34.73 SHS ON 02/12/2026 AT 19.00	659.87-		659.87	
03/03/26	DIVIDEND ON 286.875 SHS AT .0642 PER SHARE PAYABLE 03/03/2026		18.42		
	<b>VANGUARD LARGE CAP INDEX ADM</b>				
02/13/26	PURCHASED 15.107 SHS ON 02/12/2026 AT 158.12	2,388.74-		2,388.74	
03/30/26	DIVIDEND ON 262.12 SHS AT .4292 PER SHARE PAYABLE 03/27/2026		112.50		
	<b>VANGUARD MID CAP INDEX ADMIRAL</b>				
02/13/26	PURCHASED .286 SHS ON 02/12/2026 AT 369.49	105.75-		105.75	
03/30/26	DIVIDEND ON 32.575 SHS AT 1.3181 PER SHARE PAYABLE 03/27/2026		42.94		
	<b>WILLIAM BLAIR SMALL CAP VALUE CLASS I</b>				
02/13/26	SOLD 10.243 SHS ON 02/12/2026 AT 32.58	333.71		299.40-	34.31
	<b>WISDOMTREE US QUALITY GROWTH ETF</b>				
02/13/26	PURCHASED 10 SHS ON 02/12/2026 AT 56.85 THRU CLEAR STREET LLC COMMISSIONS PAID 0.16	568.66-		568.66	
01/05/26	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		3,470.91-		
	NET TRUST POINT FEE FOR THE PERIOD	414.64-	414.62-		
<b>03/31/26</b>	<b>ENDING BALANCE</b>	<b>476.14-</b>	<b>476.14</b>	<b>215,249.60</b>	<b>13,431.27</b>

ACCOUNT NUMBER: **1045000228**JANUARY 01, 2026 TO MARCH 31, 2026

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For your protection, orders or instructions regarding your account will not be accepted via voicemail or email. Please contact a member of your Financial Team if you have questions or instructions related to your account.

**LA CROSSE PUBLIC LIBRARY TRUSTEES  
TRUST UNDER THE WILL OF  
GERTRUDE SALZER GORDON**

Statement of Receipts & Expenditures  
For Quarter Ended March 31, 2026

<b>BALANCE 12-31-2025</b>		<b>\$670,434.81</b>
<b><u>INCOME</u></b>		<b>(\$24,954.41)</b>
Contributions	\$0.00	
Income	\$2,609.64	
Disbursements	(\$10,835.44)	
Realized Gain/Loss	\$34,614.65	
Change in Market Value	(\$51,343.26)	
<b><u>EXPENDITURES</u></b>		<b>\$0.00</b>
Fees	\$0.00	
<b>BALANCE 3-31-2026</b>		<b>\$645,480.40</b>

## ACCOUNT STATEMENT

ACCOUNT NUMBER: **1045000353**  
 JANUARY 01, 2026 TO MARCH 31, 2026




### TRUST POINT WEB PORTAL STATEMENT

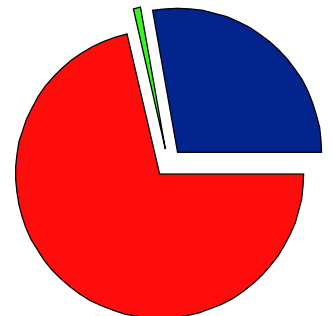
ACCOUNT NAME:	<b>GERTRUDE S. GORDON PRIVATE FOUNDATION FBO LA CROSSE PUBLIC LIBRARY</b>
FINANCIAL TEAM:	<b>CHERIE RIFENBERG 608-791-2277 crifenberg @trustpointinc.com</b>
FINANCIAL TEAM:	<b>LAURA CAMPBELL 612-416-3884 lcampbell @trustpointinc.com</b>
PORTFOLIO MANAGER:	<b>YAN ARSENAULT 608-791-2279 yarsenault @trustpointinc.com</b>

## ACTIVITY SUMMARY

	THIS PERIOD	YEAR TO DATE
<b>BEGINNING MARKET VALUE</b>	<b>670,434.81</b>	<b>670,434.81</b>
INCOME	2,609.64	2,609.64
DISBURSEMENTS	10,835.44-	10,835.44-
REALIZED GAIN/LOSS	34,614.65	34,614.65
CHANGE IN MARKET VALUE	51,343.26-	51,343.26-
<b>ENDING MARKET VALUE</b>	<b>645,480.40</b>	<b>645,480.40</b>

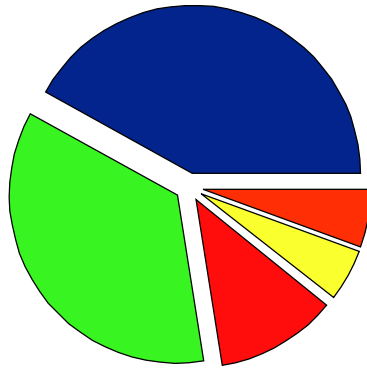
## ASSET ALLOCATION

MARKET VALUE AS OF	01/01/2026	03/31/2026	% OF ACCOUNT
 <b>BOND FUNDS</b>	164,681.82	178,415.71	27.6%
 <b>CASH AND EQUIVALENTS</b>	25,145.99	5,948.04	0.9%
 <b>EQUITY</b>	480,607.00	461,116.65	71.5%
<b>Total</b>	<b>670,434.81</b>	<b>645,480.40</b>	<b>100.0%</b>



ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2026 TO MARCH 31, 2026

**ASSET STATEMENT**
**EQUITY DIVERSIFICATION SUMMARY**


INDUSTRY CODE	MARKET VALUE	PERCENT
INTERNATIONAL EQUITY	193,928.10	42.1%
LARGE CAP EQUITY	163,899.82	35.5%
MID CAP EQUITY	54,434.19	11.8%
OTHER EQUITY FUNDS	23,510.35	5.1%
SMALL CAP EQUITY	25,344.19	5.5%
<b>Total</b>	<b>461,116.65</b>	<b>100.0%</b>

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
<b>EQUITY</b>						
<b>INTERNATIONAL EQUITY</b>						
00771X419 GQG PARTNERS EMERGING MARKETS EQUITY I	GQGIX	1,408.685	25,623.98 24,541.76	18.19 17.42	533.89	2.08
00775Y207 ARGA EMERGING MARKETS VALUE FUND	ARMIX	2,114.543	32,162.20 22,742.23	15.21 10.76	966.35	3.00
413838574 OAKMARK INTERNATIONAL R6	OAZIX	2,518.333	76,381.04 67,516.40	30.33 26.81	1,777.94 148.16	2.33
47803N448 JHANCOCK INTERNATIONAL DYNAMIC GR R6	JIJRX	3,732.722	59,760.88 65,136.00	16.01 17.45	488.99	0.82
<b>TOTAL INTERNATIONAL EQUITY</b>		<b>SUB-TOTAL</b>	<b>193,928.10</b> <b>179,936.39</b>		<b>3,767.17</b> <b>148.16</b>	<b>1.94</b>
<b>LARGE CAP EQUITY</b>						
921908844 VANGUARD DIVIDEND APPRECIATION ETF	VIG	120.000	25,807.20 17,852.09	215.06 148.77	414.48	1.61
922908579 VANGUARD LARGE CAP INDEX ADM	VLCAH	662.229	99,943.60 39,423.03	150.92 59.53	1,121.82	1.12
97717Y477 WISDOMTREE US QUALITY GROWTH ETF	QGRW	714.000	38,149.02 29,461.19	53.43 41.26	35.70	0.09
<b>TOTAL LARGE CAP EQUITY</b>		<b>SUB-TOTAL</b>	<b>163,899.82</b> <b>86,736.31</b>		<b>1,572.00</b> <b>0.00</b>	<b>0.96</b>

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2026 TO MARCH 31, 2026

**ASSET STATEMENT ( CONTINUED )**

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
<b>MID CAP EQUITY</b>						
78464A698 STATE STREET SPDR S&P REGIONAL BANKING ETF	KRE	142.000	9,251.30 10,033.97	65.15 70.66	223.51	2.42
921932844 VANGUARD S&P MID CAP 400 VALUE INDEX ETF	IVOV	156.000	15,904.20 16,970.62	101.95 108.79	287.20	1.81
922908645 VANGUARD MID CAP INDEX ADMIRAL	VIMAX	82.299	29,278.69 22,169.02	355.76 269.37	437.91	1.50
<b>TOTAL MID CAP EQUITY</b>		<b>SUB- TOTAL</b>	<b>54,434.19 49,173.61</b>		<b>948.62 0.00</b>	<b>1.74</b>
<b>OTHER EQUITY FUNDS</b>						
378690580 GLENMEDE SECURED OPTIONS I	GLSOX	1,679.311	23,510.35 19,308.33	14.00 11.50	102.44	0.44
<b>TOTAL OTHER EQUITY FUNDS</b>		<b>SUB- TOTAL</b>	<b>23,510.35 19,308.33</b>		<b>102.44 0.00</b>	<b>0.44</b>
<b>SMALL CAP EQUITY</b>						
207019704 CONESTOGA SMALL CAP INST	CCALX	146.536	9,297.71 8,656.70	63.45 59.08		
969251487 WILLIAM BLAIR SMALL CAP VALUE CLASS I	ICSCX	517.128	16,046.48 13,687.68	31.03 26.47	124.11 10.34	0.77
<b>TOTAL SMALL CAP EQUITY</b>		<b>SUB- TOTAL</b>	<b>25,344.19 22,344.38</b>		<b>124.11 10.34</b>	<b>0.49</b>
<b>TOTAL EQUITY</b>			<b>461,116.65 357,499.02</b>		<b>6,514.34 158.50</b>	<b>1.41</b>
<b>CASH AND EQUIVALENTS</b>						
31607A703 FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO			5,948.04 5,948.04	1.00 1.00	212.35 17.70	3.57
CASH			0.00			
<b>TOTAL CASH AND EQUIVALENTS</b>			<b>5,948.04 5,948.04</b>		<b>212.35 17.70</b>	<b>3.57</b>

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2026 TO MARCH 31, 2026

**ASSET STATEMENT ( CONTINUED )**

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
<b>BOND FUNDS</b>						
024525727 AMERICAN BEACON DEVELOPING WORLD INCOME Y	AGEYX	2,633.789	19,937.78 19,970.35	7.57 7.58	1,962.17	9.84
04314H568 ARTISAN HIGH INCOME I	APHFX	1,495.402	13,398.80 13,712.84	8.96 9.17	955.56 79.63	7.13
316146356 FIDELITY U.S. BOND INDEX FUND	FXNAX	6,143.480	64,322.24 64,832.88	10.47 10.55	2,346.81 195.57	3.65
46432F859 ISHARES CORE 1-5 YEAR BOND ETF	ISTB	281.000	13,617.26 13,343.90	48.46 47.49	569.59	4.18
72201F490 PIMCO INCOME FUND I	PIMIX	4,966.929	53,543.49 55,474.52	10.78 11.17	3,243.40 270.28	6.06
92206C755 VANGUARD MORTGAGE-BACKED SECURITIES INDEX	VMBSX	724.741	13,596.14 13,490.76	18.76 18.61	572.55	4.21
<b>TOTAL BOND FUNDS</b>			<b>178,415.71</b> <b>180,825.25</b>		<b>9,650.08</b> <b>545.48</b>	<b>5.41</b>
<b>GRAND TOTAL ASSETS</b>			<b>645,480.40</b> <b>544,272.31</b>		<b>16,376.77</b> <b>721.68</b>	<b>2.54</b>

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2026 TO MARCH 31, 2026

**TRANSACTION STATEMENT**

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
01/01/26	<b>BEGINNING BALANCE</b>	8,560.29-	8,560.29	517,883.46	
	<b>GQG PARTNERS EMERGING MARKETS EQUITY I</b>				
02/13/26	PURCHASED 129.048 SHS ON 02/12/2026 AT 19.36	2,498.36-		2,498.36	
	<b>ARGA EMERGING MARKETS VALUE FUND</b>				
02/13/26	PURCHASED 283.998 SHS ON 02/12/2026 AT 16.10	4,572.36-		4,572.36	
	<b>AMERICAN BEACON DEVELOPING WORLD INCOME Y</b>				
01/02/26	DIVIDEND ON 2,664.946 SHS AT .0629 PER SHARE PAYABLE 12/31/2025 TAX EFFECTIVE 12/31/2025		167.63		
02/03/26	DIVIDEND ON 2,664.946 SHS AT .0688 PER SHARE PAYABLE 02/02/2026		183.35		
02/13/26	SOLD 31.157 SHS ON 02/12/2026 AT 7.83	243.96		266.73-	22.77-
03/03/26	DIVIDEND ON 2,633.789 SHS AT .054 PER SHARE PAYABLE 03/02/2026		142.22		
	<b>ARTISAN HIGH INCOME I</b>				
02/13/26	PURCHASED 1,495.402 SHS ON 02/12/2026 AT 9.17	13,712.84-		13,712.84	
03/04/26	INTEREST PAYABLE 03/02/2026		31.62		
	<b>CONESTOGA SMALL CAP INST</b>				
02/13/26	PURCHASED 17.111 SHS ON 02/12/2026 AT 68.86	1,178.29-		1,178.29	
	<b>AMERICAN FUNDS EUPAC FUND CL F3</b>				
02/13/26	SOLD 977.7 SHS ON 02/12/2026 AT 64.31	62,875.89		45,290.93-	17,584.96
	<b>FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO</b>				
01/02/26	INTEREST PAYABLE 01/02/2026 TAX EFFECTIVE 12/31/2025		50.86		
02/02/26	INTEREST PAYABLE 02/02/2026		54.60		
03/02/26	INTEREST PAYABLE 03/02/2026		28.66		
	NET CASH MANAGEMENT	19,197.95		19,197.95-	
	<b>FIDELITY U.S. BOND INDEX FUND</b>				
01/02/26	INTEREST PAYABLE 01/02/2026 TAX EFFECTIVE 12/31/2025		152.59		
02/02/26	INTEREST PAYABLE 02/02/2026		153.10		

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2026 TO MARCH 31, 2026

**TRANSACTION STATEMENT ( CONTINUED )**

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
02/13/26	PURCHASED 1,530.973 SHS ON 02/12/2026 AT 10.64	16,289.55-		16,289.55	
03/02/26	INTEREST PAYABLE 03/02/2026		168.10		
	<b>FIDELITY INFLATION-PROTECTED BOND INDEX FUND</b>				
02/13/26	SOLD 1,281.983 SHS ON 02/12/2026 AT 9.23	11,832.70		11,589.13-	243.57
	<b>GLENMEDE SECURED OPTIONS I</b>				
02/13/26	SOLD 337.085 SHS ON 02/12/2026 AT 14.17	4,776.50		3,902.58-	873.92
	<b>OAKMARK INTERNATIONAL R6</b>				
02/13/26	SOLD 91.426 SHS ON 02/12/2026 AT 33.96	3,104.83		2,483.17-	621.66
	<b>ISHARES CORE 1-5 YEAR BOND ETF</b>				
02/05/26	DIVIDEND ON 484 SHS AT .172362 PER SHARE PAYABLE 02/05/2026		83.42		
02/13/26	SOLD 203 SHS ON 02/12/2026 AT 48.8605 THRU TD SECURITIES (USA) LLC COMMISSIONS PAID 3.24	9,915.44		9,682.41-	233.03
03/05/26	DIVIDEND ON 281 SHS AT .165647 PER SHARE PAYABLE 03/05/2026		46.55		
	<b>JHANCOCK INTERNATIONAL DYNAMIC GR R6</b>				
02/13/26	PURCHASED 3,732.722 SHS ON 02/12/2026 AT 17.45	65,136.00-		65,136.00	
	<b>PIMCO INCOME FUND I</b>				
01/05/26	INTEREST PAYABLE 01/02/2026 TAX EFFECTIVE 12/31/2025		242.98		
02/03/26	INTEREST PAYABLE 02/02/2026		242.94		
02/13/26	PURCHASED 548.959 SHS ON 02/12/2026 AT 11.07	6,076.98-		6,076.98	
03/04/26	INTEREST PAYABLE 03/02/2026		228.58		
	<b>STATE STREET SPDR S&amp;P REGIONAL BANKING ETF</b>				
02/13/26	PURCHASED 142 SHS ON 02/12/2026 AT 70.6458 THRU TD SECURITIES (USA) LLC COMMISSIONS PAID 2.27	10,033.97-		10,033.97	
03/25/26	DIVIDEND ON 142 SHS AT .364261 PER SHARE PAYABLE 03/25/2026		51.73		

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2026 TO MARCH 31, 2026

**TRANSACTION STATEMENT ( CONTINUED )**

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
	<b>VANGUARD DIVIDEND APPRECIATION ETF</b>				
02/13/26	SOLD 183 SHS ON 02/12/2026 AT 227.4258 THRU CLEAR STREET LLC COMMISSIONS PAID 2.93	41,616.00		26,621.23-	14,994.77
03/31/26	DIVIDEND ON 120 SHS AT .8334 PER SHARE PAYABLE 03/31/2026		100.01		
	<b>VANGUARD S&amp;P MID CAP 400 VALUE INDEX ETF</b>				
02/13/26	PURCHASED 156 SHS ON 02/12/2026 AT 108.77 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 2.50	16,970.62-		16,970.62	
	<b>VANGUARD MORTGAGE-BACKED SECURITIES INDEX</b>				
02/03/26	DIVIDEND ON 635.829 SHS AT .0652 PER SHARE PAYABLE 02/03/2026		41.46		
02/13/26	PURCHASED 88.912 SHS ON 02/12/2026 AT 19.00	1,689.32-		1,689.32	
03/03/26	DIVIDEND ON 724.741 SHS AT .0642 PER SHARE PAYABLE 03/03/2026		46.53		
	<b>VANGUARD LARGE CAP INDEX ADM</b>				
02/13/26	PURCHASED 39.559 SHS ON 02/12/2026 AT 158.12	6,255.05-		6,255.05	
03/30/26	DIVIDEND ON 662.229 SHS AT .4292 PER SHARE PAYABLE 03/27/2026		284.23		
	<b>VANGUARD MID CAP INDEX ADMIRAL</b>				
02/13/26	PURCHASED .904 SHS ON 02/12/2026 AT 369.49	334.03-		334.03	
03/30/26	DIVIDEND ON 82.299 SHS AT 1.3181 PER SHARE PAYABLE 03/27/2026		108.48		
	<b>WILLIAM BLAIR SMALL CAP VALUE CLASS I</b>				
02/13/26	SOLD 25.523 SHS ON 02/12/2026 AT 32.58	831.55		746.04-	85.51
	<b>WISDOMTREE US QUALITY GROWTH ETF</b>				
02/13/26	PURCHASED 25 SHS ON 02/12/2026 AT 56.85 THRU CLEAR STREET LLC COMMISSIONS PAID 0.40	1,421.65-		1,421.65	
01/05/26	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		8,931.37-		
	NET TRUST POINT FEE FOR THE PERIOD	952.04-	952.03-		
<b>03/31/26</b>	<b>ENDING BALANCE</b>	<b>1,286.53-</b>	<b>1,286.53</b>	<b>544,272.31</b>	<b>34,614.65</b>

ACCOUNT NUMBER: **1045000353**JANUARY 01, 2026 TO MARCH 31, 2026

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**Library Furniture International**  
 797 Glenn Ave  
 Wheeling, IL 60090  
 P. 847 564 9497  
 E. info@library.furniture

**Issued By:** MEGHANN REPLIN  
**Email:** MEGHANN@LIBRARY.FURNITURE  
**Phone:** 312-217-0751

**Quote #:** 6240

**Date Issued:** 03/18/26

**Contract:** N/A

**Terms:** 50% DEPOSIT;  
 BALANCE DUE  
 UPON  
 SUBSTANTIAL  
 COMPLETION\*

**Bill-to:** LA CROSSE PUBLIC LIBRARY  
 800 MAIN ST  
 LA CROSSE, WI 54601

**Ship-to:** LA CROSSE PUBLIC LIBRARY  
 800 MAIN ST  
 LA CROSSE, WI 54601

**Contact:** ISELA CATANIA  
**Email:** ISELAC@ENGBERGANDERSON.COM  
**Phone:** 847-830-4580

**Contact:** ISELA CATANIA  
**Email:** ISELAC@ENGBERGANDERSON.COM  
**Phone:** 847-830-4580

Line #	Tag	Colors/Finishes	Quantity	Manufacturer	Description	Unit Net	Ext Net
						\$	\$
3	OPAC-3	Top: Wilsonart Handspun Pear 5033-38 with brushed stainless edgeband Base: skware frame with brushed stainless finish	2	3BRANCH	Skware Self-Check Station -- OPAC 3 42" x 24" x 29.5"H (1) Wire management leg (1) Wire management tray (1) Grommet - silver (1) Humanscale NeatHub Charging Station Due in Black -- mount under	3,004.40	6,008.80

Product Total:	6,008.80
Freight, Delivery & Installation:	2,250.42
<b>Total; Supplied, Delivered &amp; Installed:</b>	<b>\$8,259.22</b>

**Quote is valid for 30 days from date of issue**

Please proceed with the above order as per the Library Furniture International standard terms and conditions of sale:

**Signed:**

\_\_\_\_\_

**Name:**

\_\_\_\_\_

**Title:**

\_\_\_\_\_

**Date:**

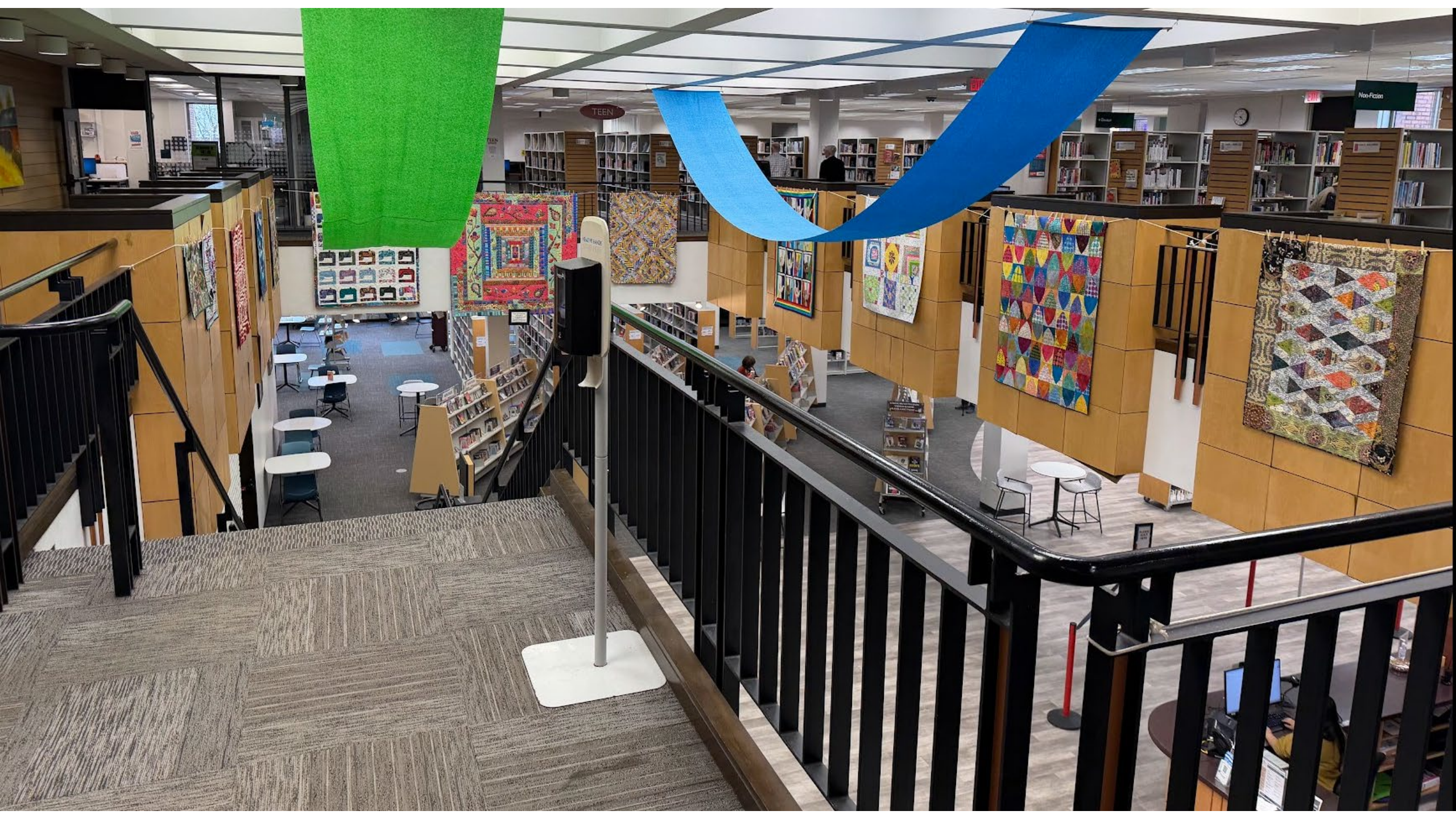
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# LA CROSSE PUBLIC LIBRARY

## La Crosse Library Meeting Agenda

April 8, 2026

2:00 pm – 2:30 pm

- I. 1-½ page Mini Case Summary
  - Discussion for revision
  - New background details
  
- II. Pre-Study Committee Meeting Role - typically library “family” - former Trustees, current Board President or Executive committee, well-connected library patrons
  
- III. Materials for the Study Committee Meeting in hard copy form:
  - Mini Case Summary
  - Review Study Committee Job Description
  - Review the Profile of a Study Committee member
  - Discuss letter inviting Study Committee members to participate
  
- IV. Questions, Comments, or Concerns

## La Crosse Public Library Mini Case Summary

The La Crosse Public Library has called 800 Main Street home since 1967. The building was expanded in 1980 and underwent renovations in 1996, 2007, and 2025, which addressed select needs but did not resolve fundamental space constraints. It has served the community well for decades, but with changing library patron usage, its outdated design no longer meets user needs and demands. Today, the library relies on an attached museum space as its primary large meeting room, underscoring the building's mismatch with modern community expectations.

In 2025, the Library Board of Trustees began a modernization phase supported by a \$3 million Flexible Facilities Grant from the State of Wisconsin. This renovation focused on improving classrooms, meeting rooms, computer labs, and technology infrastructure while enhancing connectivity and creating more flexible public spaces. Construction marked a meaningful step forward and reflects the community's commitment to investing in the library's future. However, this work represents only the first phase of a broader transformation.

Planning is underway for a potential \$7M capital campaign, which includes additional improvements to spaces dedicated to children, teens, and families, while acknowledging that deeper layout changes are still necessary to fully align the building with how today's community learns, gathers, and connects.

Plans include the following:

- Transforming underperforming spaces into welcoming, functional areas that support learning, engagement, and community connection.
- A fully redesigned and expanded children's room featuring dedicated preschool and gathering areas.
- A sensory room to allow for a quiet space for children and families with special needs. The current spaces are so busy and vibrant, which can sometimes lead to overwhelming individuals with special needs.
- A tween space for our middle-grade children who love and use the library but have limited space to engage in library services. The current configuration includes space for very young children and a dedicated teen space, though that also requires upgrades to better reflect the needs of that community.
- Significant improvements to the teen environment.

The current layout creates barriers for patrons of all ages. Shared spaces unintentionally place homeless individuals, retirees, and seniors together in ways that do not best support the needs of any group. The children's area houses a strong collection but lacks adequate space for programming and active use, while the teen space is in an exposed, awkward setting that limits engagement. Noise travels easily between floors and zones, reducing opportunities for focused study and work. Additionally, extensive tall shelving devoted to collection storage crowds out flexible spaces for learning, collaboration, and community connection.

Despite physical limitations, the library has continued moving in the right direction, including relocating some staff functions to the lower level and establishing a successful Makerspace, which hosts collaborative, hands-on workshops. The building itself is large enough to serve the community, but its archaic configuration prevents it from functioning effectively, especially in the youth services spaces. Children’s materials account for almost half of circulation and more than half of programming and events, but the Library’s footprint is less than one quarter of the overall space.

The Board of Trustees has retained Crescendo Fundraising Professionals to complete a campaign-readiness feasibility study to assess the philanthropic capacity, economic environment, and leadership potential for a \$7M capital campaign. The proposed project would support the next phase of a renovation that will reimagine key areas of the library to better serve adults, families, and young people. The Campaign Readiness Study is planned for July 9 and 10. No formal solicitation will take place during the study.



## Profile of Study Committee Members

In an analysis of Study interviewees in more than four dozen campaign readiness studies, most Study Committee members have exhibited the following characteristics or had the following backgrounds:

1. A propensity to give gifts to non-profit organizations, universities, municipalities or churches.
2. Held one or more of the following roles, positions, or attributes:
  - a. Owner of a successful business or key manager of a large business or firm
  - b. Influential individuals in the area of civic or cultural endeavors
  - c. Involved and interested in community life
  - d. Has the financial capacity or is able and willing to give or get a significant gift for the project
  - e. Has served as a board member for nonprofit organizations
  - f. Has chaired or played significant roles in other fundraising endeavors, church expansions, or significant community projects
  - g. Is well-connected to the philanthropic and business communities
  - h. Is involved and well-connected in La Crosse or the surrounding region
  - i. Has essential personal or family ties to the community (In many cases, has had 30 to 40 years or more residing and/or working in the region)

La Crosse Public Library Letterhead

June 15, 2026

Name

Address

City

Dear Study Committee (Candidate Name),

On behalf of the La Crosse Public Library Board of Trustees, please accept an invitation to participate in the brief but essential Campaign Readiness Study Committee to help determine the fundraising viability, process, and strategy for a proposed capital campaign goal of \$7M. Please see the enclosed Mini Case Summary to review details.

Your name was identified as a key stakeholder who can provide valuable feedback, as philanthropy will be required to meet this exciting milestone.

The Study Committee's commitment will involve the following:

- One overview meeting on Tuesday June 9, (in-person at \_\_\_\_\_ or virtually) from 11:30 a.m. to 1:00 p.m. a box lunch will be provided
- A 30 to 40-minute confidential interview (in person or virtually) with one of five advisors from Crescendo Fundraising Professionals on Thursday, July 9th, at \_\_\_\_\_ or virtually Friday, July 10th.
- A final meeting in September to hear the presentation and recommendations and learn about the campaign's viability. **No formal solicitation will take place during the study.**

Crescendo Fundraising Professionals has extensive experience managing more than 50 capital campaigns for non-profits and municipalities in the tri-state area.

Thank you for considering participating in this short-term but essential committee. One of the committee members will contact you to see if you are willing to participate in the Campaign Readiness Summit Study Committee and answer any questions you may have.

For more information, please email Dawn Wacek

Sincerely,

Dawn Wacek, Library Director

List Pre-Study Committee and Board names



## **La Crosse Library Public Campaign Readiness Study**

### STUDY COMMITTEE JOB DESCRIPTION

The Campaign Readiness Study Committee provides input on activities associated with the study. Committee members will assist in identifying and encouraging respondents' participation in the Campaign Readiness Study Summit Event, give a personal interview, and support the La Crosse Public Library staff and the consulting team with input to facilitate a thorough investigation of the potential campaign.

The committee is composed of 10 to 12 highly influential leaders knowledgeable about business, philanthropic, financial, and social relationships in the La Crosse area, as well as those with an affinity for the mission.

This committee contributes to the success of the proposed campaign by identifying and recruiting leaders to interview who may provide key information on the proposed project's potential viability.

### SPECIFIC RESPONSIBILITIES

- Attend one meeting on June 9, from 11:45 a.m. to 1:00 p.m, in preparation for the study and identify people who may meet the criteria for being interviewed. Assist staff and consultants in identifying potential interviewees.
- Attend your interview on Thursday, July 9, or Friday, July 10, 2026.
- Attend one study presentation meeting via telephone or in person.
- Review and approve final recommendations with the consultants, Board, and Staff.