



Meeting Minutes

Library Board

Tuesday, December 9, 2025

5:00 PM

La Crosse Public Library
Auditorium (Lower Level)

Call to Order

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

PRESENT: Sue Anglehart, Jess Thill, Aaron Engel, Kathy Ivey, Araysa Simpson, Rosanne Northwood, Erin Raymus, Mac Kiel

ABSENT:

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

Agenda Items:

1 Approval of Minutes from Regular Board Meeting – November 11, 2025

Motion to approve the minutes from the regular Board meeting of November 11, 2025.

(Aaron Engel/Kathy Ivey) Carried

2 Approval of Minutes from Committee of the Whole – December 2, 2025

Motion to approve the minutes from the Committee of the Whole meeting of December 2, 2025.

(Aaron Engel/Kathy Ivey) Carried

3 Approval of Bills & Financial Reports – November 2025

Motion to approve the bills and financial reports from November 2025.

(Aaron Engel/Kathy Ivey) Carried

4 Reports

4.1 Director's Report

4.11 Vacancy Report

LPL currently has one full-time Associate position and one part-time Assistant position open. Director Wacek shared that the current plan is to fill the full-time Associate position internally and to externally post three part-time Assistant positions after January 1—the one currently open position, as well as two additional.

Looking ahead, each position will be assessed as it becomes vacant to determine whether it should be split into two part-time roles or converted from a full-time to a part-time position. Comparable libraries are being reviewed and consulted as part of this assessment. A 50:50 full-time to part-time staffing ratio through attrition is the long-term goal. The focus is on protecting current positions as much as possible while planning ahead and structuring staffing in anticipation of future budget challenges or cuts. This information was shared at December's all-staff meeting.

4.12 Operations and Services – Staff Updates

Staff met on December 4 for an all-staff meeting. Discussion topics included the current budget, potential future changes, and Staff survey results. The survey results were used as an opportunity for reflection on Staff feedback and to identify areas for organizational improvement.

As there is no monetary or policy component involved in selecting the mural color palette, a formal vote was not required. Consensus was reached in favor of mural color palette option 2. Members of the Art Board and Staff who were consulted also preferred option 2.

4.13 Construction Update

LPL is nearing the final stages of construction. The final total cost for the electrical panel is still pending. Ms. Wacek shared that she is confident the cost will be covered by remaining contingency funds and any 2026 carryover. City Finance Director Chadwick Hawkins confirmed that, if needed, assistance would be provided to cover any remaining costs.

Over the next few weeks, the construction crew will complete bathroom partitions and accessories, install a new wall in the computer area, and finish flooring and other final finishes.

It was discovered that change orders should have also been submitted to the Board of Public Works. As a result, all ten change orders will be presented at the next Board of Public Works meeting, along with any future change orders. This was an unintentional oversight and will be corrected moving forward.

5 Old Business

5.1 2026 Main Street Library Hours

Overall, Staff preferred option 1, which reduces Main Street Library weekly open hours by four hours by closing on Sundays.

**Motion to approve 2026 Main Street Library hours, option 1.
(Aaron Engel/Erin Raymus) Carried**

5.2 2026 North Community Library Hours

Overall, Staff preferred option 1, which reduces North Community Library weekly open hours by 12 hours by operating from 2:00–6:00 p.m., Monday through Thursday.

**Motion to approve 2026 North Community Library hours, option 1.
(Aaron Engel/Kathy Ivey) Carried**

5.3 North Community Library Closure Date

**Motion to approve North Community Library closure date of June 18.
(Erin Raymus/Aaron Engel) Carried. Abstentions: 1 (Araysa Simpson)**

5.4 Approval of 2026 Library Operating Budget

Director Wacek confirmed with City Finance that the figures and calculations in the 2026 Library Operating Budget aligned with City records. The Board reviewed the budget and specific line items.

**Motion to approve the final version of the 2026 Library Operating Budget.
(Aaron Engel/Kathy Ivey) Carried**

6 New Business

6.1 Feasibility Study Update – Proposals

A small feasibility study team was formed, consisting of Ms. Wacek, Business Services Supervisor Amber Leibundgut-Peterson, Board President Sue Anglehart, Board member Jess Thill, and a Friends of the Library member. The team met to review and discuss the four proposals received in response to the request. References are currently being contacted. A recommendation will be brought to the Board, and proposals will be distributed to Board members in advance for review.

7 Topics for Future Meetings

7.1 By-laws Review

7.2 Inclusive Holiday Closures Discussion

7.3 Board Education

7.4 Capital Improvement

7.5 2026 City Handbook Updates for Adoption

7.6 Position Changes – 1 Full-time Associate to 2 Part-time Assistants and 1 Full-time Assistant 2 to 2 Part-time Assistants

7.7 Approval of End of Fiscal Year Special Trustees Reimbursements

7.8 Approval of Vendor Selection – Feasibility Study

8 Public Comment / Other

Adjournment at 5:43 p.m.

**Motion to adjourn.
(Aaron Engel/Erin Raymus) Carried**



Meeting Minutes

Library Board

Tuesday, December 2, 2025

5:00 PM

La Crosse Public Library
Auditorium (Lower Level)

COMMITTEE OF THE WHOLE

Call to Order

The Vice Chair, Kathy Ivey, called the meeting to order at 5:02 p.m.

PRESENT: Sue Anglehart, Kathy Ivey, Araysa Simpson, Mac Kiel, Erin Raymus, Jess Thill, Rosanne Northwood, Aaron Engel

ABSENT: Katie Bittner

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

Agenda Items:

1 Library Hours 2026

Director Wacek presented four options for 2026 Library hours. Two options for Main reduce operating hours by four hours per week. The first option proposes closing on Sundays; the second proposes closing two hours earlier on Wednesdays and Thursdays. Staff feedback indicates a general preference for a Sunday closure.

Two options for North reduce operating hours by 12 hours per week. The first option proposes operating Monday through Thursday from 2:00 to 6:00 p.m. The second option proposes hours of 10:00 a.m. to 2:00 p.m. on Monday and Tuesday and 2:00 to 6:00 p.m. on Wednesday and Thursday. Director Wacek will gather additional staff feedback prior to next week's regular Board meeting.

In reviewing these proposals, the Board discussed which options would best serve the greatest number of patrons. Director Wacek confirmed that school visits can still be scheduled outside of North's public hours. A vote on 2026 Library hours will occur at next week's meeting. The Board plans to revisit Main hours in the summer, following the closure of North, while considering of the potential 2027 budget.

2 North Community Library Planning

Library leadership has initiated planning for next steps in anticipation of North's June closure. A meeting is scheduled in January to discuss City ownership of the building. The June closure date will be voted on by the Board next week.

3 Mural – Arts Board Collaboration

Jacqueline Marcou, City of La Crosse Arts Coordinator, attended the meeting to discuss the exciting mural collaboration among the Arts Board, Library, and artist Lettie Jane Rennekamp. Rennekamp, based in Portland, Oregon, will work with UW–La Crosse students during the project. The mural is planned for the large exterior cement wall of Main, with a projected start in May 2026. The Board will vote on the mural color palette next week.

4 Replacement Electrical Breaker-1964

Infrastructure Manager Whitmore reported that an electrical breaker installed in 1964 failed during the planned November 18 power outage. The issue requires prompt attention and has been reported to City inspectors.

4.1 Cost Estimate and Funding

A temporary repair is estimated at approximately \$50,000, while full replacement is estimated at more than \$100,000. Final cost estimates are pending. Construction contingency funds within the grant-supported renovations may cover the expense. Carryover funds from vacant Library positions may also be available. Director Wacek noted this situation may provide an opportunity to discuss shared responsibility for unforeseen costs with Mayor Shaundel Washington-Spivey and City Finance.

5 Medora Nelson-Ferris Fund Update

Director Wacek reported that LPL has received more than 40 generous donations in honor of children's Librarian Medora Nelson-Ferris, totaling roughly \$20,000. This amount includes a generous \$10,000 contribution from the Washburn Board. The Library plans to work with the La Crosse Area Community Foundation to establish a non-endowed fund to support future renovations to spaces serving children and families.

Adjournment

Ms. Ivey adjourned the Committee of the Whole at 5:52 p.m.

LA CROSSE PUBLIC LIBRARY- FINANCIAL SUMMARY REPORT

December 2025

	Current Period	Year-to- Date	Percent of Budgeted Amount
<u>DISBURSEMENTS</u>			
City Operating Budget	\$438,132	\$4,909,663	101.67%
In-House Checking	\$15,872	\$126,212	
Total Disbursements:	\$454,004	\$5,035,875	
<u>RECEIPTS</u>			
Misc. Income	\$537	\$194,950	114.58%
WRLS Contract	\$12,756	\$12,756	56.31%
In-House Checking	\$15,150	\$216,040	
Total Receipts:	\$28,444	\$423,747	

100% of the year has elapsed


LA CROSSE
PUBLIC LIBRARY

RECEIPTS DEPOSITED THROUGH CITY HALL

December 2025

	Current Month Income	Year-to-Date Income	Budgeted Amount	% of Estimated Income for 2024
<u>MISC. INCOME</u>				
Over/Short				
Service Fees	\$87.20	\$619.81	\$0.00	
Damage to City Property	\$417.48	\$5,294.12	\$4,000.00	132.35%
Out of State Registration	\$10.00	\$2,449.83	\$2,500.00	97.99%
Misc. Fees and Fines	\$22.80	\$658.75	\$1,300.00	50.67%
County Contributions	\$0.00	\$180,883.00	\$180,882.00	100.00%
Pcard rebates	\$0.00	\$4,990.73	\$5,000.00	99.81%
Sale of Property/Equipment	\$0.00	\$54.00		
Restitution				
WRLSWEB				
Subtotal Misc. Income	\$537.48	\$194,950.24	\$193,682.00	100.65%
<u>INCOME FROM WRLS CONTRACT</u>	\$12,756.44	\$12,756.44	\$22,654.00	56.31%
Total Income:	\$13,293.92	\$207,706.68	\$216,336.00	96.01%
City Allocation			\$4,984,759.00	
TOTAL BUDGETED INCOME:			\$5,201,095.00	

CITY OPERATING BUDGET REPORT

December 2025

	Budgeted Amount 2025	Current Period Expended	Year-to- Date Expended	% of Total Budget Expended	BALANCE
GENERAL ADMINISTRATION					
Salaries (+ \$135,000 unapplied COLA/Step)	\$3,065,612	\$228,983	\$2,979,392	97.19%	\$86,220
Cell phone reimbursement		\$170	\$1,780		(\$1,780)
Health Insurance	\$702,117	\$58,479	\$680,351	96.90%	\$21,766
Life Insurance	\$16,216	\$215	\$3,550	21.89%	\$12,666
Social Security/Medicare	\$234,519	\$16,881	\$220,016	93.82%	\$14,503
Wisconsin Retirement System	\$197,033	\$14,689	\$189,027	95.94%	\$8,006
Other Benefits	\$0	\$320	\$1,954		(\$1,954)
Contract Services	\$120,075	\$3,295	\$107,281	89.35%	\$12,794
Conference/Travel Expenses	\$13,725	\$0	\$9,696	70.65%	\$4,029
Telephone Expenses	\$23,000	\$863	\$18,711	81.35%	\$4,289
Electricity	\$99,251	\$6,084	\$76,936	77.52%	\$22,315
Water	\$5,414	\$0	\$1,921	35.49%	\$3,493
Natural Gas	\$62,579	\$898	\$26,832	42.88%	\$35,747
Sewer	\$4,930	\$0	\$3,469	70.36%	\$1,461
Storm Water	\$3,914	\$0	\$1,510	38.57%	\$2,404
Supplies	\$23,232	\$1,894	\$10,741	46.23%	\$12,491
Gasoline	\$1,000	\$101	\$717	71.74%	\$283
Postage	\$2,300	\$119	\$1,600	69.57%	\$700
Memberships/Subscriptions (WRLS WEB)	\$50,433	\$0	\$49,736	98.62%	\$697
Repair & Maintenance	\$73,885	\$2,438	\$73,906	100.03%	(\$21)
R&M Equipment Repair	\$0	\$0	\$0		\$0
Building Improvements	\$10,000	\$2,340	\$2,340	23.40%	\$7,660
Prior Year Expenses (Sewer Repair)	\$0	\$0	\$4,750		(\$4,750)
Sub Total:	\$4,709,235	\$337,767	\$4,466,217	94.84%	\$243,018
AUTOMATION					
Computer Equipment/Software/Vendor	\$167,560	\$2,067	\$146,536	87.45%	\$21,024
Sub Total:	\$167,560	\$2,067	\$146,536	87.45%	\$21,024
MATERIALS					
Books and Publications	\$324,300	\$98,299	\$296,911	91.55%	\$27,389
Sub Total:	\$324,300	\$98,299	\$296,911	91.55%	\$27,389
TOTAL BUDGET:	\$5,201,095	\$438,132	\$4,909,663	94.40%	\$291,432

					ITEM 3B
<u>FUND BALANCE (formerly Carryover)</u>					
	Amount		Expended	% Spent	Available Balance
Fund Balance into 2025	\$136,701.99				
Architectural fees 2024 (paid in 2025)	\$3,565				
Architectural fees 2025 up to \$6600 (approved 5/13)	\$3,095				
Library Vehicle up to \$76,537 (approved 5/13)	\$46,645				
Library Truck up to \$30,045 (approved 7/8)	\$29,354				
Total available after expenditures - contingency:	\$4,043				

DETAIL - CITY OPERATING BUDGET

December 2025

GENERAL LIBRARY ADMINISTRATION**Employee Benefits - 1004010-511050**

Emplify Health	\$160.00 Pre-employment health screenings - Frontline, maintenance
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CONTRACTUAL SERVICES - 1004010-520110

Engberg Anderson	\$1,176.00 Automobile mileage
Marco	\$2,119.32 Printer service contract

REPAIR & MAINTENANCE - 1004010-540000

Ahern	\$714.00 Alarm IP address change
	Hand soap, replacement motor part, reusable k cup return, work
Amazon	\$416.01 uniform pants
Menards	\$18.98 Oil bag, snow brush
Schilling	\$80.61 Trash bags
UniFirst	\$668.74 Mats, mops, uniforms, & rags
Woodland Power Products	\$169.00 Hose

BUILDING IMPROVEMENTS - 1004010-580105

Hengel Brothers, Inc	\$2,340.00 Water heater install
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SUPPLIES/MISC - 1004010-532000

ACE Hardware	\$170.65 Painting supplies
Amazon	\$895.72 Wall calendars, planners, sticky notes, duster refills, contact paper, tape, office chairs, book stands, planner return, sharpies,
ebay	\$217.17 Tape
King Art	\$118.44 Markers, crayons, paint, pens
Sam's Club	\$59.92 Facial tissues
Quill	\$569.89 Paper

TELEPHONE - 1004010-521101

Brightspeed	\$88.12 Analog phone service
Lumen	\$6.90 Long distance charges
Nextiva	\$725.36 Phone service
Verizon	\$46.25 Cell phone service

GASOLINE - 1004010-532055

Kwik Trip	\$100.53 Gasoline
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POSTAGE - 1004010 - 532060

Quadient	\$14.17 Postage
USPS	\$23.60 Postage

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

Adobe	\$244.93 Creative Cloud all apps
Amazon	\$101.29 Apple adapter
Dynamic Lifecycle Innovations	\$361.55 E-waste recycling
Microsoft	\$80.84 Office 365

IN-HOUSE CHECKING REPORT

December 2025

RECEIPTS:**1400 ACCOUNT**\$1,413.01**3400 ACCOUNT****Purpose of Gift**

Donations (various)	\$1,030.10	Fundraising
PD staff day meal reimbursement, FOL membership	\$974.00	FOL
Threadless staff purchase reimbursement	\$65.95	Miscellaneous
Tote Sales, Cash donation	\$20.00	Pantry
Explore La Crosse - Dark Tours	\$900.00	Archives
H. Gund Sr. semi-annual dividend	\$133.13	Washburn
M. O'Sullivan & F. Ball donation	\$1,000.00	Fundraising
Donations (various)	\$1,135.00	M N-F Fund
S. Gelatt Fund donation, LACF - Jespersen	\$2,750.00	Fundraising
FOL - LACF Podcast Grant	\$3,800.00	Programming
PayPal - Threadless sales - credit card transfer	\$15.86	Pantry
GiveButter donations (various) - credit card	\$230.00	Medora Nelson-Ferris Fund
GiveButter donations (various) - credit card	\$650.00	Fundraising
Cash donation	\$100.00	Medora Nelson-Ferris Fund
\$65 Cash donations, \$18 tote sales	\$83.00	Pantry
Cash donations	\$93.33	Fundraising
Subtotal	\$12,980.37	

4400 ACCOUNT**Total Receipts: \$14,393.38****DISBURSEMENTS:****3400 ACCOUNT****Source of Funds - Item Purchased**

Cardmember Services - Walmart	\$90.88	PE - Program snacks
Trevipay - Walmart	\$253.70	PE - Tablecloths, balloons (Wicked program), prize books, coloring books, stickers (BGC programs), feathers, gingerbread building house supplies (Gingerbread program)
B. Brown - bike light reimbursement	\$65.72	Pantry
A. Baumann - Walmart reimbursement for Gingerbread house program supplies	\$101.19	PE
Midwest Prints - St. Francis School of Nursing and North Branch blueprints	\$228.00	Archives
Scholastic Inc - book prizes	\$541.00	OM \$200, PE \$341
Cardmember Services	\$140.96	Washburn (D. Wacek WLA Annual Conference meals)
Cardmember Services	\$1,107.07	Public Experiences \$660.31 (spray paint, rocks, seed paper, cups, plates, picture frames, bobbins, mini pencils, food and beverages for memorial, pipe cleaners, beads, paint markers, Domino's pizza, Wicked program supplies, stickers, dry erase erasers, glow in the dark tape, Snowscapes program supplies) -\$8.99 (edible glitter return/refund); Washburn \$82.64 (Sam's Club - staff development day food) -\$110.37 (Sam's Club - staff development day food return/refund); Pantry \$204.55 (body wipes, deodorant, shampoo, razors, electric kettle); Miscellaneous \$12.99 (ALA grant book); General Programming \$265.94 (Mailchimp, Zoom, Spotify, Sam's Club membership renewal)
Tri-State Sound & Light	\$2,890.76	Programming - Podcast Grant
B. Olson-Pollack - Breath, Body, Bowls 1/10	\$100.00	G. Gordon
J. Filla - Breath, Body, Bowls 1/10	\$100.00	G. Gordon
J. Pedretti - Chair Yoga: 1/8, 1/15, 1/22, 1/25	\$280.00	G. Gordon
	\$5,899.28	

4400 ACCOUNT**Total Disbursements: \$5,899.28**

IN-HOUSE CHECKING REPORT- SUMMARY

December 2025

MONTHLY ACTIVITY SUMMARY**1400 ACCOUNT (COPY)**

End of November Balance	\$28,916.71
Income	\$1,413.01
Disbursements	\$0.00
End of December Balance	\$30,329.72

3400 ACCOUNT (GIFT)

End of November Balance	\$213,467.46
Income	\$12,980.37
Disbursements	-\$6,792.21
End of December Balance	\$219,655.62

4400 ACCOUNT (CREDIT CARD)

End of November Balance	\$43,600.59
Income	\$757.36
Disbursements	-\$89.85
End of November Balance	\$44,268.10

YEAR-TO-DATE ACTIVITY SUMMARY**1400 ACCOUNT (COPY)**

Income	\$8,668.46
Disbursements	(\$337.17)

3400 ACCOUNT (GIFT)

Income	\$195,038.02
Disbursements	(\$115,765.16)

4400 ACCOUNT (CREDIT CARD)

Income	\$12,333.87
Disbursements	(\$10,109.29)

GIFT FUND (RESTRICTED) AS OF 12/31/2025

December 2025

	1/1/2025 Balance	YTD Debits	YTD Credits	Current Balance
Library Materials				
Regional Read	\$1,196.00	\$0.00	\$0.00	\$1,196.00
Subtotal:	\$1,196.00	\$0.00	\$0.00	\$1,196.00
Miscellaneous				
Archives	\$34,293.06	\$2,825.74	\$4,299.35	\$35,766.67
Creation Space	\$1,304.24	\$1,098.60	\$3,524.00	\$3,729.64
Discretionary (Equipment/Furniture)	\$7,002.78	\$10,476.64	\$13,256.73	\$9,782.87
Friends	\$2,370.76	\$5,042.66	\$5,595.54	\$2,923.64
Fundraising	\$25,619.01	\$209.47	\$6,877.88	\$32,287.42
Donald (Sandy) Gordon Estate	\$801.47	\$0.00	\$11,688.08	\$12,489.55
Gertrude Salzer Gordon Estate	\$10,582.83	\$16,683.77	\$30,882.49	\$24,781.55
Medora Nelson-Ferris	\$0.00	\$0.00	\$21,275.00	\$21,275.00
Misc.	\$6,073.84	\$4,470.24	\$2,463.81	\$4,067.41
Misc. - Art Fund	\$759.16	\$0.00	\$0.00	\$759.16
Misc. - Banner Project	\$2,010.54	\$0.00	\$1,000.00	\$3,010.54
Misc. - Mobile Library	\$4,623.57	\$612.08	\$0.00	\$4,011.49
North Enhancements	\$0.00	\$14,050.00	\$50,000.00	\$35,950.00
Pantry	\$9,479.95	\$5,533.09	\$1,529.70	\$5,476.56
Programming - General	\$868.80	\$2,592.51	\$2,201.29	\$477.58
Programming - Public Experiences	\$6,516.42	\$23,065.97	\$20,687.19	\$4,137.64
Programming - Outreach/Marketing	\$2,176.77	\$10,492.74	\$9,524.91	\$1,208.94
Programming - LACF Grant - Podcast Supplies	\$0.00	\$2,890.76	\$3,800.00	\$909.24
Programming - YS Misc	\$2,782.55	\$339.68	\$0.00	\$2,442.87
Spec. Trustees - General	\$1,001.00	\$0.00	\$0.00	\$1,001.00
Spec. Trustees - Board Retreat	-\$462.71	\$0.00	\$462.71	\$0.00
Spec. Trustees - Main Space Audit	-\$271.84	\$0.00	\$0.00	-\$271.84
Spec. Trustees - Retirements	-\$695.51	\$600.00	\$695.51	-\$600.00
Spec. Trustees - D. Wacek Open House	\$0.00	\$500.00	\$0.00	-\$500.00
Tool Library	-\$218.22	\$208.67	\$1,315.97	\$889.08
Washburn	\$14,963.19	\$7,809.41	\$6,292.51	\$13,446.29
Subtotal:	\$131,581.66	\$109,502.03	\$197,372.67	\$219,452.30
GRANTS				
ALA Grant	4,282.90	\$4,282.90	\$0.00	\$0.00
Foundation Grant	\$2,256.82	\$2,256.57	\$0.00	\$0.25
World We Live in Grant (Fiscal Agent)	\$4,737.49	\$4,737.49	\$0.00	\$0.00
Subtotal:	\$11,277.21	\$11,276.96	\$0.00	\$0.25
YTD TOTALS				
	\$144,054.87	\$120,778.99	\$197,372.67	\$220,648.55
BANK BALANCE				
				\$220,648.55

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

Statement of Receipts & Expenditures
For Quarter Ended December 31, 2025

BALANCE 9-30-2025		\$1,025,289.06
<u>INCOME</u>		\$69,853.86
Revenue	\$50,065.27	
Disbursements	(\$16,013.52)	
Realized Gain/Loss	(\$11,463.03)	
Change in Market Value	\$47,265.14	
<u>EXPENDITURES</u>		\$0.00
Fees	\$0.00	
BALANCE 12-31-2025		\$1,095,142.92



ACCOUNT STATEMENT

ACCOUNT NUMBER: 1045001021

JANUARY 01, 2025 TO DECEMBER 31, 2025

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

FINANCIAL TEAM: MAI LOR
715-900-2301
mlor@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

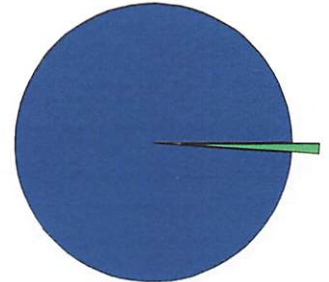
	THIS PERIOD	YEAR TO DATE
BEGINNING MARKET VALUE	1,025,289.06	1,025,289.06
INCOME	50,065.27	50,065.27
DISBURSEMENTS	16,013.52-	16,013.52-
REALIZED GAIN/LOSS	11,463.03-	11,463.03-
CHANGE IN MARKET VALUE	47,265.14	47,265.14
ENDING MARKET VALUE	1,095,142.92	1,095,142.92

ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET ALLOCATION

MARKET VALUE AS OF	01/01/2025	12/31/2025	% OF ACCOUNT
 BOND FUNDS	1, 013, 251. 01	1, 082, 844. 97	98. 9%
 CASH AND EQUIVALENTS	12, 038. 05	12, 297. 95	1. 1%
Total	1, 025, 289. 06	1, 095, 142. 92	100. 0%



ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET STATEMENT

DESCRIPTION			MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
CASH AND EQUIVALENTS						
31607A703						
FIDELITY INVESTMENTS GOVT INST			12,297.95	1.00	456.25	3.71
MONEY MARKET PORTFOLIO			12,297.95	1.00	38.02	
CASH			0.00			
TOTAL CASH AND EQUIVALENTS			12,297.95		456.25	3.71
			12,297.95		38.02	
DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
BOND FUNDS						
024525727						
AMERICAN BEACON DEVELOPING WORLD	AGEYX	10,242.249	77,533.82	7.57	7,937.74	10.24
INCOME Y			79,275.88	7.74		
316146356						
FIDELITY U.S. BOND INDEX FUND	FXNAX	38,829.510	410,039.63	10.56	14,599.90	3.56
			446,870.91	11.51	1,216.66	
31635T104						
FIDELITY INFLATION-PROTECTED	FIPDX	9,394.886	85,681.36	9.12	3,579.45	4.18
BOND INDEX FUND			84,990.93	9.05	298.29	
46432F859						
ISHARES CORE 1-5 YEAR BOND ETF	ISTB	2,807.000	136,841.25	48.75	5,636.46	4.12
			133,687.60	47.63		
72201F490						
PIMCO INCOME FUND I	PIMIX	26,938.273	296,051.62	10.99	17,779.26	6.01
			297,166.43	11.03	1,481.61	
92206C755						
VANGUARD MORTGAGE-BACKED	VMBSX	4,077.474	76,697.29	18.81	3,208.97	4.18
SECURITIES INDEX			85,865.45	21.06		
TOTAL BOND FUNDS			1,082,844.97		52,741.78	4.87
			1,127,857.20		2,996.56	
GRAND TOTAL ASSETS			1,095,142.92		53,198.03	4.86
			1,140,155.15		3,034.58	

ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
01/01/25	BEGINNING BALANCE	170,005.07-	170,005.07	1,117,566.43	
	AMERICAN BEACON DEVELOPING WORLD INCOME Y				
01/02/25	DIVIDEND ON 3,728.962 SHS AT .0818 PER SHARE PAYABLE 12/31/2024		305.03		
02/04/25	DIVIDEND ON 3,728.962 SHS AT .0724 PER SHARE PAYABLE 02/03/2025		269.98		
03/04/25	DIVIDEND ON 3,728.962 SHS AT .0611 PER SHARE PAYABLE 03/03/2025		227.84		
04/02/25	DIVIDEND ON 3,728.962 SHS AT .0527 PER SHARE PAYABLE 04/01/2025		196.52		
05/02/25	DIVIDEND ON 3,728.962 SHS AT .0594 PER SHARE PAYABLE 05/01/2025		221.50		
06/03/25	DIVIDEND ON 3,728.962 SHS AT .0711 PER SHARE PAYABLE 06/02/2025		265.13		
07/02/25	DIVIDEND ON 3,728.962 SHS AT .0601 PER SHARE PAYABLE 07/01/2025		224.11		
08/04/25	DIVIDEND ON 3,728.962 SHS AT .0666 PER SHARE PAYABLE 08/01/2025		248.35		
08/27/25	PURCHASED 3,566.918 SHS ON 08/26/2025 AT 7.32	26,109.84-		26,109.84	
09/04/25	DIVIDEND ON 7,295.88 SHS AT .0594 PER SHARE PAYABLE 09/02/2025		433.38		
09/16/25	PURCHASED 2,946.369 SHS ON 09/15/2025 AT 7.35	21,655.81-		21,655.81	
10/02/25	DIVIDEND ON 10,242.249 SHS AT .0591 PER SHARE PAYABLE 10/01/2025		605.32		
11/04/25	DIVIDEND ON 10,242.249 SHS AT .0639 PER SHARE PAYABLE 11/03/2025		654.48		
12/02/25	DIVIDEND ON 10,242.249 SHS AT .0674 PER SHARE PAYABLE 12/01/2025		690.33		

ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
	FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO				
01/02/25	INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		42.91		
02/03/25	INTEREST PAYABLE 02/03/2025		50.54		
03/03/25	INTEREST PAYABLE 03/03/2025		59.21		
04/01/25	INTEREST PAYABLE 04/01/2025		45.38		
05/01/25	INTEREST PAYABLE 05/01/2025		56.15		
06/02/25	INTEREST PAYABLE 06/02/2025		68.52		
07/01/25	INTEREST PAYABLE 07/01/2025		77.38		
08/01/25	INTEREST PAYABLE 08/01/2025		81.06		
09/02/25	INTEREST PAYABLE 09/02/2025		77.34		
10/01/25	INTEREST PAYABLE 10/01/2025		72.98		
11/03/25	INTEREST PAYABLE 11/03/2025		87.75		
12/01/25	INTEREST PAYABLE 12/01/2025		92.14		
	NET CASH MANAGEMENT	259.90-		259.90	
	FIDELITY U.S. BOND INDEX FUND				
01/02/25	INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		1,160.96		
02/03/25	INTEREST PAYABLE 02/03/2025		1,168.98		
02/20/25	PURCHASED 4,517.936 SHS ON 02/19/2025 AT 10.26	46,354.02-		46,354.02	
03/03/25	INTEREST PAYABLE 03/03/2025		1,132.56		
04/01/25	INTEREST PAYABLE 04/01/2025		1,325.92		
05/01/25	INTEREST PAYABLE 05/01/2025		1,301.16		
06/02/25	INTEREST PAYABLE 06/02/2025		1,348.83		
07/01/25	INTEREST PAYABLE 07/01/2025		1,319.71		
08/01/25	INTEREST PAYABLE 08/01/2025		1,361.69		
08/27/25	SOLD 2,082.174 SHS ON 08/26/2025 AT 10.47	21,800.36		26,091.65-	4,291.29-
09/02/25	INTEREST PAYABLE 09/02/2025		1,357.15		
09/16/25	SOLD 2,039.153 SHS ON 09/15/2025 AT 10.62	21,655.81		25,412.93-	3,757.12-
10/01/25	INTEREST PAYABLE 10/01/2025		1,244.59		

ACCOUNT NUMBER: 1045001021

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
11/03/25	INTEREST PAYABLE 11/03/2025		1,253.46		
12/01/25	INTEREST PAYABLE 12/01/2025		1,222.65		
12/09/25	PURCHASED 543.853 SHS ON 12/08/2025 AT 10.55	5,737.65-		5,737.65	
	FIDELITY INFLATION-PROTECTED BOND INDEX FUND				
02/20/25	PURCHASED 9,159.645 SHS ON 02/19/2025 AT 9.04	82,803.19-		82,803.19	
04/07/25	DIVIDEND ON 9,159.645 SHS AT .031 PER SHARE PAYABLE 04/07/2025		283.95		
07/14/25	DIVIDEND ON 9,159.645 SHS AT .076 PER SHARE PAYABLE 07/14/2025		696.13		
10/06/25	DIVIDEND ON 9,159.645 SHS AT .084 PER SHARE PAYABLE 10/06/2025		769.41		
12/09/25	PURCHASED 235.241 SHS ON 12/08/2025 AT 9.30	2,187.74-		2,187.74	
12/18/25	DIVIDEND ON 9,394.886 SHS AT 0.19 PER SHARE PAYABLE 12/18/2025		1,785.03		
	ISHARES CORE 1-5 YEAR BOND ETF				
02/06/25	DIVIDEND ON 4,884 SHS AT .163154 PER SHARE PAYABLE 02/06/2025		796.84		
02/19/25	SOLD 2,179 SHS ON 02/18/2025 AT 47.90 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 34.86 EXPENSES PAID 2.90	104,336.34		106,065.60-	1,729.26-
03/06/25	DIVIDEND ON 2,705 SHS AT .156778 PER SHARE PAYABLE 03/06/2025		424.08		
04/04/25	DIVIDEND ON 2,705 SHS AT .165987 PER SHARE PAYABLE 04/04/2025		448.99		
05/06/25	DIVIDEND ON 2,705 SHS AT .163818 PER SHARE PAYABLE 05/06/2025		443.13		
06/05/25	DIVIDEND ON 2,705 SHS AT .17051311 PER SHARE PAYABLE 06/05/2025		461.24		
07/07/25	DIVIDEND ON 2,705 SHS AT .168099 PER SHARE PAYABLE 07/07/2025		454.71		
08/06/25	DIVIDEND ON 2,705 SHS AT .170015 PER SHARE PAYABLE 08/06/2025		459.89		

ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
09/05/25	DIVIDEND ON 2,705 SHS AT .170936 PER SHARE PAYABLE 09/05/2025		462.38		
10/06/25	DIVIDEND ON 2,705 SHS AT .167954 PER SHARE PAYABLE 10/06/2025		454.32		
11/06/25	DIVIDEND ON 2,705 SHS AT .171984 PER SHARE PAYABLE 11/06/2025		465.22		
12/04/25	DIVIDEND ON 2,705 SHS AT .169305 PER SHARE PAYABLE 12/04/2025		457.97		
12/09/25	PURCHASED 102 SHS ON 12/08/2025 AT 48.685 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 1.63	4,967.50-		4,967.50	
12/24/25	DIVIDEND ON 2,807 SHS AT .169902 PER SHARE PAYABLE 12/24/2025		476.91		
01/06/25	PIMCO INCOME FUND I INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		1,131.08		
02/04/25	INTEREST PAYABLE 02/03/2025		1,131.02		
02/20/25	PURCHASED 5,743.267 SHS ON 02/19/2025 AT 10.63	61,050.93-		61,050.93	
03/04/25	INTEREST PAYABLE 03/03/2025		1,254.71		
04/03/25	INTEREST PAYABLE 04/01/2025		1,447.00		
05/02/25	INTEREST PAYABLE 05/01/2025		1,445.53		
06/03/25	INTEREST PAYABLE 06/02/2025		1,446.92		
07/02/25	INTEREST PAYABLE 07/01/2025		1,447.36		
08/04/25	INTEREST PAYABLE 08/01/2025		1,447.00		
09/04/25	INTEREST PAYABLE 09/02/2025		1,446.98		
10/02/25	INTEREST PAYABLE 10/01/2025		1,446.18		
11/05/25	INTEREST PAYABLE 11/03/2025		1,446.61		
11/24/25	RECEIVED FROM DIVIDEND		0.40		
12/02/25	INTEREST PAYABLE 12/01/2025		1,447.00		
12/09/25	PURCHASED 629.107 SHS ON 12/08/2025 AT 10.95	6,888.72-		6,888.72	
01/06/25	VANGUARD SHORT TERM TREASURY ADM INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		280.11		
02/04/25	INTEREST PAYABLE 02/03/2025		282.20		

ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
02/20/25	SOLD 8,055.808 SHS ON 02/19/2025 AT 9.81	79,027.48		80,712.84-	1,685.36-
03/04/25	INTEREST PAYABLE 03/03/2025		176.31		
	VANGUARD MORTGAGE-BACKED SECURITIES INDEX				
02/03/25	DIVIDEND ON 3,925.212 SHS AT .0633 PER SHARE PAYABLE 02/03/2025		248.47		
03/03/25	DIVIDEND ON 3,925.212 SHS AT .0631 PER SHARE PAYABLE 03/03/2025		247.68		
04/01/25	DIVIDEND ON 3,925.212 SHS AT .0652 PER SHARE PAYABLE 04/01/2025		255.92		
05/01/25	DIVIDEND ON 3,925.212 SHS AT .0787 PER SHARE PAYABLE 05/01/2025		308.91		
06/02/25	DIVIDEND ON 3,925.212 SHS AT .0639 PER SHARE PAYABLE 06/02/2025		250.82		
07/01/25	DIVIDEND ON 3,925.212 SHS AT .0647 PER SHARE PAYABLE 07/01/2025		253.96		
08/01/25	DIVIDEND ON 3,925.212 SHS AT .0649 PER SHARE PAYABLE 08/01/2025		254.75		
09/02/25	DIVIDEND ON 3,925.212 SHS AT .0657 PER SHARE PAYABLE 09/02/2025		257.89		
10/01/25	DIVIDEND ON 3,925.212 SHS AT .0609 PER SHARE PAYABLE 10/01/2025		239.05		
11/03/25	DIVIDEND ON 3,925.212 SHS AT .0683 PER SHARE PAYABLE 11/03/2025		268.09		
12/01/25	DIVIDEND ON 3,925.212 SHS AT .0643 PER SHARE PAYABLE 12/01/2025		252.39		
12/09/25	PURCHASED 152.262 SHS ON 12/08/2025 AT 18.76	2,856.44-		2,856.44	
12/18/25	DIVIDEND ON 4,077.474 SHS AT .0637 PER SHARE PAYABLE 12/18/2025		259.74		

ACCOUNT NUMBER: **1045001021**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
01/15/25	PAID TO LA CROSSE PUBLIC LIBRARY DISTRIBUTION PER BOARD APPROVAL ON 12/10/2024	1,062.71-			
07/17/25	PAID TO LA CROSSE PUBLIC LIBRARY DISTRIBUTION PER EMAIL REQUEST FOR STAFF IN RECOGNITION OF S. GRANT FROM SPECIAL TRUSTEE PER BOARD APPROVAL	2,000.00-			
07/17/25	PAID TO LA CROSSE PUBLIC LIBRARY DISTRIBUTION PER EMAIL REQUEST FOR 2025-2026 DIRECTOR'S HOSPITALITY FROM SPECIAL TRUSTEE PER BOARD APPROVAL	5,000.00-			
	NET TRUST POINT FEE FOR THE PERIOD	3,975.43-	3,975.38-		
12/31/25	ENDING BALANCE	216,094.96-	216,094.96	1,140,155.15	11,463.03-

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

Statement of Receipts & Expenditures
For Quarter Ended December 31, 2025

BALANCE 9-30-2025		\$247,242.50
<u>INCOME</u>		\$18,174.09
Contributions	\$31.30	
Income	\$6,592.56	
Disbursements	(\$15,956.35)	
Realized Gain/Loss	\$14,465.38	
Change in Market Value	\$13,041.20	
<u>EXPENDITURES</u>		\$0.00
Fees	\$0.00	
BALANCE 12-31-2025		\$265,416.59



ACCOUNT STATEMENT

ACCOUNT NUMBER: 1045000228

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRUST POINT WEB PORTAL STATEMENT

ACCOUNT NAME: DONALD A. GORDON, JR.
PRIVATE FOUNDATION FBO
LA CROSSE PUBLIC LIBRARY

FINANCIAL TEAM: CHERIE RIFENBERG
608-791-2277
crifenberg
@trustpointinc.com

FINANCIAL TEAM: LAURA CAMPBELL
612-416-3884
lcampbell
@trustpointinc.com

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

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ACTIVITY SUMMARY

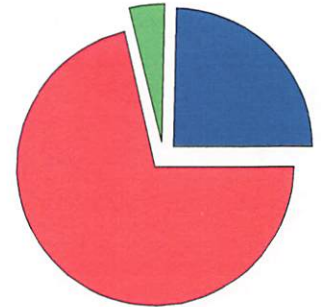
	THIS PERIOD	YEAR TO DATE
BEGINNING MARKET VALUE	247,242.50	247,242.50
CONTRIBUTIONS	31.30	31.30
INCOME	6,592.56	6,592.56
DISBURSEMENTS	15,956.35	15,956.35
REALIZED GAIN/LOSS	14,465.38	14,465.38
CHANGE IN MARKET VALUE	13,041.20	13,041.20
ENDING MARKET VALUE	265,416.59	265,416.59

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET ALLOCATION

MARKET VALUE AS OF	01/01/2025	12/31/2025	% OF ACCOUNT
 BOND FUNDS	64,094.59	65,275.97	24.6%
 CASH AND EQUIVALENTS	7,614.74	10,944.03	4.1%
 EQUITY	175,533.17	189,196.59	71.3%
Total	247,242.50	265,416.59	100.0%



ACCOUNT NUMBER: 1045000228

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET STATEMENT

EQUITY DIVERSIFICATION SUMMARY



DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
EQUITY						
INTERNATIONAL EQUITY						
00771X419 GQG PARTNERS EMERGING MARKETS EQUITY I	GQGIX	507.449	9,032.59 8,740.44	17.80 17.22	143.10	1.58
00775Y207 ARGA EMERGING MARKETS VALUE FUND	ARMIX	726.178	10,173.75 7,208.25	14.01 9.93	252.71	2.48
298706110 AMERICAN FUNDS EUPAC FUND CL F3	FEUPX	366.021	22,202.83 16,905.06	60.66 46.19	729.85	3.29
413838574 OAKMARK INTERNATIONAL R6	OAZIX	1,034.039	33,492.52 27,557.08	32.39 26.65	730.03 60.84	2.18
TOTAL INTERNATIONAL EQUITY		SUB-TOTAL	74,901.69 60,410.83		1,855.69 60.84	2.48
LARGE CAP EQUITY						
921908844 VANGUARD DIVIDEND APPRECIATION ETF	VIG	120.000	26,373.60 17,614.76	219.78 146.79	426.96	1.62
922908579 VANGUARD LARGE CAP INDEX ADM	VLCAH	247.013	39,262.72 13,201.05	158.95 53.44	422.39	1.08
97717Y477 WISDOMTREE US QUALITY GROWTH ETF	QGRW	273.000	16,016.91 11,110.00	58.67 40.70	13.65	0.09
TOTAL LARGE CAP EQUITY		SUB-TOTAL	81,653.23 41,925.81		863.00 0.00	1.06

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET STATEMENT (CONTINUED)

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
MID CAP EQUITY						
922908645 VANGUARD MID CAP INDEX ADMIRAL	VIMAX	32.289	11,603.38 8,668.19	359.36 268.46	175.65	1.51
TOTAL MID CAP EQUITY		SUB-TOTAL	11,603.38 8,668.19		175.65 0.00	1.51
OTHER EQUITY FUNDS						
378690580 GLENMEDE SECURED OPTIONS I	GLSOX	798.653	11,181.14 9,191.67	14.00 11.51	48.72	0.44
TOTAL OTHER EQUITY FUNDS		SUB-TOTAL	11,181.14 9,191.67		48.72 0.00	0.44
SMALL CAP EQUITY						
207019704 CONESTOGA SMALL CAP INST	CCALX	51.325	3,452.12 2,968.32	67.26 57.83		
969251487 WILLIAM BLAIR SMALL CAP VALUE CLASS I	ICSCX	214.934	6,405.03 5,718.29	29.80 26.60	51.58 4.30	0.81
TOTAL SMALL CAP EQUITY		SUB-TOTAL	9,857.15 8,686.61		51.58 4.30	0.52
TOTAL EQUITY			189,196.59 128,883.11		2,994.64 65.14	1.58
DESCRIPTION			MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
CASH AND EQUIVALENTS						
31607A703 FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO			10,944.03 10,944.03	1.00 1.00	406.02 33.84	3.71
CASH			0.00			
TOTAL CASH AND EQUIVALENTS			10,944.03 10,944.03		406.02 33.84	3.71
DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
BOND FUNDS						
024525727 AMERICAN BEACON DEVELOPING WORLD INCOME Y	AGEYX	1,055.516	7,990.26 8,020.12	7.57 7.60	818.02	10.24
316146356 FIDELITY U.S. BOND INDEX FUND	FXNAX	1,826.893	19,291.99 19,231.31	10.56 10.53	686.91 57.24	3.56

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET STATEMENT (CONTINUED)

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
BOND FUNDS						
31635T104 FIDELITY INFLATION-PROTECTED BOND INDEX FUND	FIPDX	508.385	4,636.47 4,595.80	9.12 9.04	193.69 16.14	4.18
46432F859 ISHARES CORE 1-5 YEAR BOND ETF	ISTB	192.000	9,360.00 9,134.65	48.75 47.58	385.54	4.12
72201F490 PIMCO INCOME FUND I	PIMIX	1,751.993	19,254.40 19,587.38	10.99 11.18	1,156.32 96.36	6.01
92206C755 VANGUARD MORTGAGE-BACKED SECURITIES INDEX	VMBSX	252.145	4,742.85 4,680.87	18.81 18.56	198.44	4.18
TOTAL BOND FUNDS			65,275.97 65,250.13		3,438.92 169.74	5.27
GRAND TOTAL ASSETS			265,416.59 205,077.27		6,839.58 268.72	2.58

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
01/01/25	BEGINNING BALANCE	2,535.98-	2,535.98	199,944.38	
	GQG PARTNERS EMERGING MARKETS EQUITY I				
04/21/25	PURCHASED 70.955 SHS ON 04/17/2025 AT 16.14	1,145.22-		1,145.22	
12/31/25	DIVIDEND ON 507.449 SHS AT .3785 PER SHARE PAYABLE 12/30/2025		192.07		
	ARGA EMERGING MARKETS VALUE FUND				
04/21/25	PURCHASED 172.493 SHS ON 04/17/2025 AT 10.46	1,804.28-		1,804.28	
05/14/25	SOLD 55.214 SHS ON 05/13/2025 AT 11.61	641.04		538.89-	102.15
12/19/25	CAP GAINS DIVIDEND ON 726.178 SHS AT .285 PER SHARE PAYABLE 12/19/2025	206.96			206.96
12/19/25	CAP GAINS DIVIDEND ON 726.178 SHS AT .2017 PER SHARE PAYABLE 12/19/2025		146.47		146.47
12/31/25	DIVIDEND ON 726.178 SHS AT .4569 PER SHARE PAYABLE 12/30/2025		331.79		
	AMERICAN BEACON DEVELOPING WORLD INCOME Y				
01/02/25	DIVIDEND ON 330.066 SHS AT .0818 PER SHARE PAYABLE 12/31/2024		27.00		
02/04/25	DIVIDEND ON 330.066 SHS AT .0724 PER SHARE PAYABLE 02/03/2025		23.90		
03/04/25	DIVIDEND ON 330.066 SHS AT .0611 PER SHARE PAYABLE 03/03/2025		20.17		
04/02/25	DIVIDEND ON 330.066 SHS AT .0527 PER SHARE PAYABLE 04/01/2025		17.39		
04/21/25	PURCHASED 6.533 SHS ON 04/17/2025 AT 6.90	45.08-		45.08	
05/02/25	DIVIDEND ON 336.599 SHS AT .0594 PER SHARE PAYABLE 05/01/2025		19.99		
06/03/25	DIVIDEND ON 336.599 SHS AT .0711 PER SHARE PAYABLE 06/02/2025		23.93		
07/02/25	DIVIDEND ON 336.599 SHS AT .0601 PER SHARE PAYABLE 07/01/2025		20.23		
08/04/25	DIVIDEND ON 336.599 SHS AT .0666 PER SHARE PAYABLE 08/01/2025		22.42		
09/02/25	PURCHASED 359.012 SHS ON 08/29/2025 AT 7.33	2,631.56-		2,631.56	

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
09/04/25	DIVIDEND ON 695.611 SHS AT .0594 PER SHARE PAYABLE 09/02/2025		41.32		
09/16/25	PURCHASED 359.905 SHS ON 09/15/2025 AT 7.35	2,645.30-		2,645.30	
10/02/25	DIVIDEND ON 1,055.516 SHS AT .0591 PER SHARE PAYABLE 10/01/2025		62.38		
11/04/25	DIVIDEND ON 1,055.516 SHS AT .0639 PER SHARE PAYABLE 11/03/2025		67.45		
12/02/25	DIVIDEND ON 1,055.516 SHS AT .0674 PER SHARE PAYABLE 12/01/2025		71.14		
04/21/25	CONESTOGA SMALL CAP INST SOLD 59.544 SHS ON 04/17/2025 AT 68.02	4,050.19		4,235.34-	185.15-
12/05/25	CAP GAINS DIVIDEND ON 51.325 SHS AT 3.6525 PER SHARE PAYABLE 12/04/2025	187.46			187.46
04/21/25	AMERICAN FUNDS EUPAC FUND CL F3 PURCHASED 156.049 SHS ON 04/17/2025 AT 53.82	8,398.54-		8,398.54	
05/14/25	SOLD 21.697 SHS ON 05/13/2025 AT 59.13	1,282.93		1,189.21-	93.72
06/11/25	CAP GAINS DIVIDEND ON 366.021 SHS AT 1.6642 PER SHARE PAYABLE 06/10/2025	609.13			609.13
12/22/25	DIVIDEND ON 366.021 SHS AT 1.9941 PER SHARE PAYABLE 12/19/2025		729.88		
12/22/25	CAP GAINS DIVIDEND ON 366.021 SHS AT 4.7949 PER SHARE PAYABLE 12/19/2025	1,755.03			1,755.03
01/02/25	FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		18.84		
02/03/25	INTEREST PAYABLE 02/03/2025		20.04		
03/03/25	INTEREST PAYABLE 03/03/2025		16.28		
04/01/25	INTEREST PAYABLE 04/01/2025		13.34		
05/01/25	INTEREST PAYABLE 05/01/2025		10.72		
06/02/25	INTEREST PAYABLE 06/02/2025		5.15		

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
07/01/25	INTEREST PAYABLE 07/01/2025		3.32		
08/01/25	INTEREST PAYABLE 08/01/2025		4.73		
09/02/25	INTEREST PAYABLE 09/02/2025		4.63		
10/01/25	INTEREST PAYABLE 10/01/2025		18.73		
11/03/25	INTEREST PAYABLE 11/03/2025		19.02		
12/01/25	INTEREST PAYABLE 12/01/2025		17.34		
	NET CASH MANAGEMENT	3,329.29-		3,329.29	
01/02/25	FIDELITY U.S. BOND INDEX FUND INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		69.05		
02/03/25	INTEREST PAYABLE 02/03/2025		69.53		
03/03/25	INTEREST PAYABLE 03/03/2025		64.86		
04/01/25	INTEREST PAYABLE 04/01/2025		70.46		
04/21/25	PURCHASED 434.177 SHS ON 04/17/2025 AT 10.30	4,472.02-		4,472.02	
05/01/25	INTEREST PAYABLE 05/01/2025		73.61		
06/02/25	INTEREST PAYABLE 06/02/2025		85.49		
07/01/25	INTEREST PAYABLE 07/01/2025		83.64		
08/01/25	INTEREST PAYABLE 08/01/2025		86.30		
09/02/25	SOLD 623.174 SHS ON 08/29/2025 AT 10.47	6,524.63		6,923.88-	399.25-
09/02/25	INTEREST PAYABLE 09/02/2025		86.71		
09/16/25	SOLD 237.697 SHS ON 09/15/2025 AT 10.62	2,524.34		2,569.50-	45.16-
10/01/25	INTEREST PAYABLE 10/01/2025		62.26		
11/03/25	INTEREST PAYABLE 11/03/2025		59.81		
12/01/25	INTEREST PAYABLE 12/01/2025		58.34		
02/20/25	FIDELITY INFLATION-PROTECTED BOND INDEX FUND PURCHASED 560.07 SHS ON 02/19/2025 AT 9.04	5,063.03-		5,063.03	
04/07/25	DIVIDEND ON 560.07 SHS AT .031 PER SHARE PAYABLE 04/07/2025		17.36		
04/21/25	SOLD 51.685 SHS ON 04/17/2025 AT 9.12	471.37		467.23-	4.14

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
07/14/25	DIVIDEND ON 508.385 SHS AT .076 PER SHARE PAYABLE 07/14/2025		38.64		
10/06/25	DIVIDEND ON 508.385 SHS AT .084 PER SHARE PAYABLE 10/06/2025		42.70		
12/18/25	DIVIDEND ON 508.385 SHS AT 0.19 PER SHARE PAYABLE 12/18/2025		96.59		
04/04/25	GLENMEDE SECURED OPTIONS I DIVIDEND ON 1,404.875 SHS AT .0315 PER SHARE PAYABLE 04/02/2025		44.25		
04/21/25	PURCHASED 117.408 SHS ON 04/17/2025 AT 12.95	1,520.43-		1,520.43	
07/07/25	DIVIDEND ON 1,522.283 SHS AT .0083 PER SHARE PAYABLE 07/07/2025		12.63		
09/12/25	SOLD 723.63 SHS ON 09/11/2025 AT 14.53	10,514.35		8,634.28-	1,880.07
10/03/25	DIVIDEND ON 798.653 SHS AT .0149 PER SHARE PAYABLE 10/06/2025		11.90		
12/17/25	DIVIDEND ON 798.653 SHS AT .0059 PER SHARE PAYABLE 12/16/2025		4.71		
12/17/25	CAP GAINS DIVIDEND ON 798.653 SHS AT .4287 PER SHARE PAYABLE 12/16/2025	342.38			342.38
12/17/25	CAP GAINS DIVIDEND ON 798.653 SHS AT .5622 PER SHARE PAYABLE 12/16/2025		449.00		449.00
04/21/25	OAKMARK INTERNATIONAL R6 PURCHASED 288.271 SHS ON 04/17/2025 AT 26.40	7,610.35-		7,610.35	
09/12/25	PURCHASED 241.439 SHS ON 09/11/2025 AT 31.25	7,544.97-		7,544.97	
12/12/25	DIVIDEND ON 1,034.039 SHS AT .7061 PER SHARE PAYABLE 12/11/2025		730.13		
02/06/25	ISHARES CORE 1-5 YEAR BOND ETF DIVIDEND ON 402 SHS AT .163154 PER SHARE PAYABLE 02/06/2025		65.59		
02/19/25	SOLD 191 SHS ON 02/18/2025 AT 47.90 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 3.06 EXPENSES PAID 0.26	9,145.58		9,269.32-	123.74-
03/06/25	DIVIDEND ON 211 SHS AT .156778 PER SHARE PAYABLE 03/06/2025		33.08		

ACCOUNT NUMBER: 1045000228

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
04/04/25	DIVIDEND ON 211 SHS AT .165987 PER SHARE PAYABLE 04/04/2025		35.02		
04/21/25	SOLD 19 SHS ON 04/17/2025 AT 48.2284 THRU TD SECURITIES (USA) LLC COMMISSIONS PAID 0.30 EXPENSES PAID 0.02	916.02		917.85-	1.83-
05/06/25	DIVIDEND ON 192 SHS AT .163818 PER SHARE PAYABLE 05/06/2025		31.45		
06/05/25	DIVIDEND ON 192 SHS AT .17051311 PER SHARE PAYABLE 06/05/2025		32.74		
07/07/25	DIVIDEND ON 192 SHS AT .168099 PER SHARE PAYABLE 07/07/2025		32.27		
08/06/25	DIVIDEND ON 192 SHS AT .170015 PER SHARE PAYABLE 08/06/2025		32.64		
09/05/25	DIVIDEND ON 192 SHS AT .170936 PER SHARE PAYABLE 09/05/2025		32.82		
10/06/25	DIVIDEND ON 192 SHS AT .167954 PER SHARE PAYABLE 10/06/2025		32.25		
11/06/25	DIVIDEND ON 192 SHS AT .171984 PER SHARE PAYABLE 11/06/2025		33.02		
12/04/25	DIVIDEND ON 192 SHS AT .169305 PER SHARE PAYABLE 12/04/2025		32.51		
12/24/25	DIVIDEND ON 192 SHS AT .169902 PER SHARE PAYABLE 12/24/2025		32.62		
01/06/25	PIMCO INCOME FUND I INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		76.78		
02/04/25	INTEREST PAYABLE 02/03/2025		76.78		
02/20/25	PURCHASED 510.363 SHS ON 02/19/2025 AT 10.63	5,425.16-		5,425.16	
03/04/25	INTEREST PAYABLE 03/03/2025		87.78		
04/03/25	INTEREST PAYABLE 04/01/2025		104.86		
04/21/25	SOLD 154.507 SHS ON 04/17/2025 AT 10.56	1,631.59		1,909.71-	278.12-
05/02/25	INTEREST PAYABLE 05/01/2025		101.92		
06/03/25	INTEREST PAYABLE 06/02/2025		96.35		
07/02/25	INTEREST PAYABLE 07/01/2025		96.38		
08/04/25	INTEREST PAYABLE 08/01/2025		96.36		
09/04/25	INTEREST PAYABLE 09/02/2025		96.36		

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
10/02/25	INTEREST PAYABLE 10/01/2025		96.30		
11/05/25	INTEREST PAYABLE 11/03/2025		96.33		
11/24/25	RECEIVED FROM DIVIDEND		0.02		
12/02/25	INTEREST PAYABLE 12/01/2025		96.36		
	VANGUARD DIVIDEND APPRECIATION ETF				
03/31/25	DIVIDEND ON 116 SHS AT .9377 PER SHARE PAYABLE 03/31/2025		108.77		
04/21/25	PURCHASED 4 SHS ON 04/17/2025 AT 185.01 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 0.06	740.10-		740.10	
07/02/25	DIVIDEND ON 120 SHS AT .8712 PER SHARE PAYABLE 07/02/2025		104.54		
10/01/25	DIVIDEND ON 120 SHS AT .8647 PER SHARE PAYABLE 10/01/2025		103.76		
12/24/25	DIVIDEND ON 120 SHS AT .884400135 PER SHARE PAYABLE 12/24/2025		106.13		
	VANGUARD MORTGAGE-BACKED SECURITIES INDEX				
02/03/25	DIVIDEND ON 267.683 SHS AT .0633 PER SHARE PAYABLE 02/03/2025		16.94		
03/03/25	DIVIDEND ON 267.683 SHS AT .0631 PER SHARE PAYABLE 03/03/2025		16.89		
04/01/25	DIVIDEND ON 267.683 SHS AT .0652 PER SHARE PAYABLE 04/01/2025		17.45		
04/21/25	SOLD 15.538 SHS ON 04/17/2025 AT 18.28	284.04		294.44-	10.40-
05/01/25	DIVIDEND ON 252.145 SHS AT .0787 PER SHARE PAYABLE 05/01/2025		19.84		
06/02/25	DIVIDEND ON 252.145 SHS AT .0639 PER SHARE PAYABLE 06/02/2025		16.11		
07/01/25	DIVIDEND ON 252.145 SHS AT .0647 PER SHARE PAYABLE 07/01/2025		16.31		
08/01/25	DIVIDEND ON 252.145 SHS AT .0649 PER SHARE PAYABLE 08/01/2025		16.36		
09/02/25	DIVIDEND ON 252.145 SHS AT .0657 PER SHARE PAYABLE 09/02/2025		16.57		
10/01/25	DIVIDEND ON 252.145 SHS AT .0609 PER SHARE PAYABLE 10/01/2025		15.36		

ACCOUNT NUMBER: 1045000228

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
11/03/25	DIVIDEND ON 252.145 SHS AT .0683 PER SHARE PAYABLE 11/03/2025		17.22		
12/01/25	DIVIDEND ON 252.145 SHS AT .0643 PER SHARE PAYABLE 12/01/2025		16.21		
12/18/25	DIVIDEND ON 252.145 SHS AT .0637 PER SHARE PAYABLE 12/18/2025		16.06		
03/28/25	VANGUARD LARGE CAP INDEX ADM DIVIDEND ON 314.298 SHS AT .4451 PER SHARE PAYABLE 03/28/2025		139.89		
04/21/25	SOLD 49.124 SHS ON 04/17/2025 AT 122.31	6,008.38		2,009.63-	3,998.75
05/14/25	SOLD 18.161 SHS ON 05/13/2025 AT 136.63	2,481.31		609.08-	1,872.23
07/01/25	DIVIDEND ON 247.013 SHS AT .425 PER SHARE PAYABLE 07/01/2025		104.98		
09/30/25	DIVIDEND ON 247.013 SHS AT .4091 PER SHARE PAYABLE 09/30/2025		101.05		
12/23/25	DIVIDEND ON 247.013 SHS AT .4303 PER SHARE PAYABLE 12/22/2025		106.29		
03/28/25	VANGUARD MID CAP INDEX ADMIRAL DIVIDEND ON 56.136 SHS AT 1.4365 PER SHARE PAYABLE 03/28/2025		80.64		
04/21/25	SOLD 21.482 SHS ON 04/17/2025 AT 304.23	6,535.57		2,993.50-	3,542.07
05/14/25	SOLD 2.365 SHS ON 05/13/2025 AT 334.87	791.83		329.56-	462.27
07/01/25	DIVIDEND ON 32.289 SHS AT 1.3184 PER SHARE PAYABLE 07/01/2025		42.57		
09/30/25	DIVIDEND ON 32.289 SHS AT 1.2715 PER SHARE PAYABLE 09/30/2025		41.06		
12/23/25	DIVIDEND ON 32.289 SHS AT 1.4133 PER SHARE PAYABLE 12/22/2025		45.63		
04/21/25	WILLIAM BLAIR SMALL CAP VALUE CLASS I SOLD 137.018 SHS ON 04/17/2025 AT 25.24	3,458.33		4,005.03-	546.70-
09/12/25	PURCHASED 74.861 SHS ON 09/11/2025 AT 30.17	2,258.56-		2,258.56	
12/19/25	DIVIDEND ON 214.934 SHS AT .23969 PER SHARE PAYABLE 12/18/2025		51.52		

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
12/19/25	CAP GAINS DIVIDEND ON 214.934 SHS AT .37269 PER SHARE PAYABLE 12/18/2025	80.10			80.10
12/19/25	CAP GAINS DIVIDEND ON 214.934 SHS AT .06746 PER SHARE PAYABLE 12/18/2025		14.50		14.50
04/21/25	WISDOMTREE US QUALITY GROWTH ETF SOLD 31 SHS ON 04/17/2025 AT 41.8376 THRU CLEAR STREET LLC COMMISSIONS PAID 0.49 EXPENSES PAID 0.04	1,296.43		1,261.58-	34.85
05/14/25	SOLD 33 SHS ON 05/13/2025 AT 49.03 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 0.53 EXPENSES PAID 0.04	1,617.42		1,342.97-	274.45
12/30/25	DIVIDEND ON 273 SHS AT 0.05 PER SHARE PAYABLE 12/30/2025		13.65		
01/06/25	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		2,650.87-		
04/07/25	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		831.78-		
05/12/25	PAID TO UNITED STATES TREASURY 2025 FORM 990-PF ESTIMATE	139.26-			
05/15/25	PAID TO LA CROSSE PUBLIC LIBRARY BALANCE OF PREVIOUS YEAR REQUIRED DISTRIBUTION	7,334.48-			
05/27/25	RECEIVED FROM UNITED STATES TREASURY 2024 FIDUCIARY FEDERAL TAX REFUND	31.30			
07/07/25	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		160.72-		
10/06/25	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		710.23-		
	NET TRUST POINT FEE FOR THE PERIOD	1,564.54-	1,564.47-		
	NET TAX PREPARATION FEE FOR THE PERIOD	500.00-	500.00-		
12/31/25	ENDING BALANCE	3,320.44-	3,320.44	205,077.27	14,465.38

ACCOUNT NUMBER: **1045000228**

JANUARY 01, 2025 TO DECEMBER 31, 2025

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 December 31, 2025

BALANCE 9-30-2025		\$623,480.11
<u>INCOME</u>		\$46,954.70
Contributions	\$60.47	
Income	\$16,722.89	
Disbursements	(\$39,378.23)	
Realized Gain/Loss	\$36,790.58	
Change in Market Value	\$32,758.99	
<u>EXPENDITURES</u>		\$0.00
Fees	\$0.00	
BALANCE 12-31-2025		\$670,434.81



ACCOUNT STATEMENT

ACCOUNT NUMBER: 1045000353

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRUST POINT WEB PORTAL STATEMENT

ACCOUNT NAME: GERTRUDE S. GORDON
PRIVATE FOUNDATION FBO
LA CROSSE PUBLIC LIBRARY

FINANCIAL TEAM: CHERIE RIFENBERG
608-791-2277
crifenberg
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FINANCIAL TEAM: LAURA CAMPBELL
612-416-3884
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ACTIVITY SUMMARY

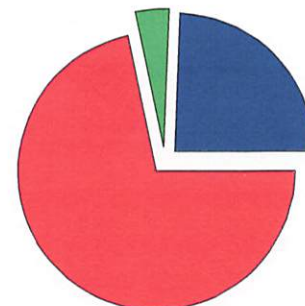
	THIS PERIOD	YEAR TO DATE
BEGINNING MARKET VALUE	623,480.11	623,480.11
CONTRIBUTIONS	60.47	60.47
INCOME	16,722.89	16,722.89
DISBURSEMENTS	39,378.23-	39,378.23-
REALIZED GAIN/LOSS	36,790.58	36,790.58
CHANGE IN MARKET VALUE	32,758.99	32,758.99
ENDING MARKET VALUE	670,434.81	670,434.81

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET ALLOCATION

MARKET VALUE AS OF	01/01/2025	12/31/2025	% OF ACCOUNT
 BOND FUNDS	161,613.48	164,681.82	24.6%
 CASH AND EQUIVALENTS	19,090.76	25,145.99	3.7%
 EQUITY	442,775.87	480,607.00	71.7%
Total	623,480.11	670,434.81	100.0%



ACCOUNT NUMBER: 1045000353

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET STATEMENT

EQUITY DIVERSIFICATION SUMMARY



DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
EQUITY						
INTERNATIONAL EQUITY						
00771X419 GQG PARTNERS EMERGING MARKETS EQUITY I	GQGIX	1,279.637	22,777.54 22,043.40	17.80 17.23	360.86	1.58
00775Y207 ARGA EMERGING MARKETS VALUE FUND	ARMIX	1,830.545	25,645.94 18,169.87	14.01 9.93	637.03	2.48
298706110 AMERICAN FUNDS EUPAC FUND CL F3	FEUPX	977.700	59,307.28 45,290.93	60.66 46.32	1,949.53	3.29
413838574 OAKMARK INTERNATIONAL R6	OAZIX	2,609.759	84,530.09 69,999.57	32.39 26.82	1,842.49 153.54	2.18
TOTAL INTERNATIONAL EQUITY		SUB-TOTAL	192,260.85 155,503.77		4,789.91 153.54	2.49
LARGE CAP EQUITY						
921908844 VANGUARD DIVIDEND APPRECIATION ETF	VIG	303.000	66,593.34 44,473.32	219.78 146.78	1,078.07	1.62
922908579 VANGUARD LARGE CAP INDEX ADM	VLCAH	622.670	98,973.40 33,167.98	158.95 53.27	1,064.77	1.08
97717Y477 WISDOMTREE US QUALITY GROWTH ETF	QGRW	689.000	40,423.63 28,039.54	58.67 40.70	34.45	0.09
TOTAL LARGE CAP EQUITY		SUB-TOTAL	205,990.37 105,680.84		2,177.29 0.00	1.06

ACCOUNT NUMBER: 1045000353

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET STATEMENT (CONTINUED)

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
MID CAP EQUITY						
922908645 VANGUARD MID CAP INDEX ADMIRAL	VIMAX	81.395	29,250.11 21,834.99	359.36 268.26	442.79	1.51
TOTAL MID CAP EQUITY		SUB-TOTAL	29,250.11 21,834.99		442.79 0.00	1.51
OTHER EQUITY FUNDS						
378690580 GLENMEDE SECURED OPTIONS I	GLSOX	2,016.396	28,229.54 23,210.91	14.00 11.51	123.00	0.44
TOTAL OTHER EQUITY FUNDS		SUB-TOTAL	28,229.54 23,210.91		123.00 0.00	0.44
SMALL CAP EQUITY						
207019704 CONESTOGA SMALL CAP INST	CCALX	129.425	8,705.13 7,478.41	67.26 57.78		
969251487 WILLIAM BLAIR SMALL CAP VALUE CLASS I	ICSCX	542.651	16,171.00 14,433.72	29.80 26.60	130.24 10.85	0.81
TOTAL SMALL CAP EQUITY		SUB-TOTAL	24,876.13 21,912.13		130.24 10.85	0.52
TOTAL EQUITY			480,607.00 328,142.64		7,663.23 164.39	1.59

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
CASH AND EQUIVALENTS						
31607A703 FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO			25,145.99 25,145.99	1.00 1.00	932.92 77.74	3.71
CASH			0.00			
TOTAL CASH AND EQUIVALENTS			25,145.99 25,145.99		932.92 77.74	3.71

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
BOND FUNDS						
024525727 AMERICAN BEACON DEVELOPING WORLD INCOME Y	AGEYX	2,664.946	20,173.64 20,237.08	7.57 7.59	2,065.33	10.24
316146356 FIDELITY U.S. BOND INDEX FUND	FXNAX	4,612.507	48,708.07 48,543.33	10.56 10.52	1,734.30 144.53	3.56

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2025 TO DECEMBER 31, 2025

ASSET STATEMENT (CONTINUED)

DESCRIPTION	TICKER	SHARES	MARKET VALUE/ TAX COST	MARKET PRICE/ COST PRICE	EST ANNUAL INCOME/ ACCRUED INC	CURRENT YIELD
BOND FUNDS						
31635T104 FIDELITY INFLATION-PROTECTED BOND INDEX FUND	FIPDX	1,281.983	11,691.68 11,589.13	9.12 9.04	488.44 40.70	4.18
46432F859 ISHARES CORE 1-5 YEAR BOND ETF	ISTB	484.000	23,595.00 23,026.31	48.75 47.58	971.87	4.12
72201F490 PIMCO INCOME FUND I	PIMIX	4,417.970	48,553.49 49,397.54	10.99 11.18	2,915.86 242.99	6.01
92206C755 VANGUARD MORTGAGE-BACKED SECURITIES INDEX	VMBSX	635.829	11,959.94 11,801.44	18.81 18.56	500.40	4.18
TOTAL BOND FUNDS			164,681.82 164,594.83		8,676.20 428.22	5.27
GRAND TOTAL ASSETS			670,434.81 517,883.46		17,272.35 670.35	2.58

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
01/01/25	BEGINNING BALANCE	6,489.83-	6,489.83	503,687.75	
	GQG PARTNERS EMERGING MARKETS EQUITY I				
04/21/25	PURCHASED 178.189 SHS ON 04/17/2025 AT 16.14	2,875.97-		2,875.97	
12/31/25	DIVIDEND ON 1,279.637 SHS AT .3785 PER SHARE PAYABLE 12/30/2025		484.34		
	ARGA EMERGING MARKETS VALUE FUND				
04/21/25	PURCHASED 433.929 SHS ON 04/17/2025 AT 10.46	4,538.90-		4,538.90	
05/14/25	SOLD 139.892 SHS ON 05/13/2025 AT 11.61	1,624.14		1,365.35-	258.79
12/19/25	CAP GAINS DIVIDEND ON 1,830.545 SHS AT .285 PER SHARE PAYABLE 12/19/2025	521.71			521.71
12/19/25	CAP GAINS DIVIDEND ON 1,830.545 SHS AT .2017 PER SHARE PAYABLE 12/19/2025		369.22		369.22
12/31/25	DIVIDEND ON 1,830.545 SHS AT .4569 PER SHARE PAYABLE 12/30/2025		836.38		
	AMERICAN BEACON DEVELOPING WORLD INCOME Y				
01/02/25	DIVIDEND ON 832.892 SHS AT .0818 PER SHARE PAYABLE 12/31/2024		68.13		
02/04/25	DIVIDEND ON 832.892 SHS AT .0724 PER SHARE PAYABLE 02/03/2025		60.30		
03/04/25	DIVIDEND ON 832.892 SHS AT .0611 PER SHARE PAYABLE 03/03/2025		50.89		
04/02/25	DIVIDEND ON 832.892 SHS AT .0527 PER SHARE PAYABLE 04/01/2025		43.89		
04/21/25	PURCHASED 15.906 SHS ON 04/17/2025 AT 6.90	109.75-		109.75	
05/02/25	DIVIDEND ON 848.798 SHS AT .0594 PER SHARE PAYABLE 05/01/2025		50.42		
06/03/25	DIVIDEND ON 848.798 SHS AT .0711 PER SHARE PAYABLE 06/02/2025		60.35		
07/02/25	DIVIDEND ON 848.798 SHS AT .0601 PER SHARE PAYABLE 07/01/2025		51.01		
08/04/25	DIVIDEND ON 848.798 SHS AT .0666 PER SHARE PAYABLE 08/01/2025		56.53		
09/02/25	PURCHASED 907.345 SHS ON 08/29/2025 AT 7.33	6,650.84-		6,650.84	

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
09/04/25	DIVIDEND ON 1,756.143 SHS AT .0594 PER SHARE PAYABLE 09/02/2025		104.31		
09/16/25	PURCHASED 908.803 SHS ON 09/15/2025 AT 7.35	6,679.70-		6,679.70	
10/02/25	DIVIDEND ON 2,664.946 SHS AT .0591 PER SHARE PAYABLE 10/01/2025		157.50		
11/04/25	DIVIDEND ON 2,664.946 SHS AT .0639 PER SHARE PAYABLE 11/03/2025		170.29		
12/02/25	DIVIDEND ON 2,664.946 SHS AT .0674 PER SHARE PAYABLE 12/01/2025		179.62		
04/21/25	CONESTOGA SMALL CAP INST SOLD 150.074 SHS ON 04/17/2025 AT 68.02	10,208.04		10,674.73-	466.69-
12/05/25	CAP GAINS DIVIDEND ON 129.425 SHS AT 3.6525 PER SHARE PAYABLE 12/04/2025	472.72			472.72
04/21/25	AMERICAN FUNDS EUPAC FUND CL F3 PURCHASED 393.67 SHS ON 04/17/2025 AT 53.82	21,187.32-		21,187.32	
06/11/25	CAP GAINS DIVIDEND ON 977.7 SHS AT 1.6642 PER SHARE PAYABLE 06/10/2025	1,627.09			1,627.09
12/22/25	DIVIDEND ON 977.7 SHS AT 1.9941 PER SHARE PAYABLE 12/19/2025		1,949.63		
12/22/25	CAP GAINS DIVIDEND ON 977.7 SHS AT 4.7949 PER SHARE PAYABLE 12/19/2025	4,687.97			4,687.97
01/02/25	FIDELITY INVESTMENTS GOVT INST MONEY MARKET PORTFOLIO INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		46.95		
02/03/25	INTEREST PAYABLE 02/03/2025		49.92		
03/03/25	INTEREST PAYABLE 03/03/2025		40.73		
04/01/25	INTEREST PAYABLE 04/01/2025		33.64		
05/01/25	INTEREST PAYABLE 05/01/2025		27.04		
06/02/25	INTEREST PAYABLE 06/02/2025		15.76		
07/01/25	INTEREST PAYABLE 07/01/2025		13.12		
08/01/25	INTEREST PAYABLE 08/01/2025		14.69		

ACCOUNT NUMBER: 1045000353

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
09/02/25	INTEREST PAYABLE 09/02/2025		14.10		
10/01/25	INTEREST PAYABLE 10/01/2025		41.75		
11/03/25	INTEREST PAYABLE 11/03/2025		37.77		
12/01/25	INTEREST PAYABLE 12/01/2025		34.39		
	NET CASH MANAGEMENT	6,055.23-		6,055.23	
01/02/25	FIDELITY U.S. BOND INDEX FUND INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		174.08		
02/03/25	INTEREST PAYABLE 02/03/2025		175.28		
03/03/25	INTEREST PAYABLE 03/03/2025		163.51		
04/01/25	INTEREST PAYABLE 04/01/2025		177.63		
04/21/25	PURCHASED 1,096.465 SHS ON 04/17/2025 AT 10.30	11,293.59-		11,293.59	
05/01/25	INTEREST PAYABLE 05/01/2025		185.59		
06/02/25	INTEREST PAYABLE 06/02/2025		215.58		
07/01/25	INTEREST PAYABLE 07/01/2025		210.92		
08/01/25	INTEREST PAYABLE 08/01/2025		217.63		
09/02/25	SOLD 1,565.399 SHS ON 08/29/2025 AT 10.47	16,389.73		17,389.46-	999.73-
09/02/25	INTEREST PAYABLE 09/02/2025		218.65		
09/16/25	SOLD 599.785 SHS ON 09/15/2025 AT 10.62	6,369.72		6,483.68-	113.96-
10/01/25	INTEREST PAYABLE 10/01/2025		157.18		
11/03/25	INTEREST PAYABLE 11/03/2025		151.01		
12/01/25	INTEREST PAYABLE 12/01/2025		147.30		
02/20/25	FIDELITY INFLATION-PROTECTED BOND INDEX FUND PURCHASED 1,412.285 SHS ON 02/19/2025 AT 9.04	12,767.06-		12,767.06	
04/07/25	DIVIDEND ON 1,412.285 SHS AT .031 PER SHARE PAYABLE 04/07/2025		43.78		
04/21/25	SOLD 130.302 SHS ON 04/17/2025 AT 9.12	1,188.35		1,177.93-	10.42
07/14/25	DIVIDEND ON 1,281.983 SHS AT .076 PER SHARE PAYABLE 07/14/2025		97.43		

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
10/06/25	DIVIDEND ON 1,281.983 SHS AT .084 PER SHARE PAYABLE 10/06/2025		107.69		
12/18/25	DIVIDEND ON 1,281.983 SHS AT 0.19 PER SHARE PAYABLE 12/18/2025		243.58		
04/04/25	GLENMEDE SECURED OPTIONS I DIVIDEND ON 3,545.058 SHS AT .0315 PER SHARE PAYABLE 04/02/2025		111.67		
04/21/25	PURCHASED 293.663 SHS ON 04/17/2025 AT 12.95	3,802.93-		3,802.93	
07/07/25	DIVIDEND ON 3,838.721 SHS AT .0083 PER SHARE PAYABLE 07/07/2025		31.86		
09/12/25	SOLD 1,822.325 SHS ON 09/11/2025 AT 14.53	26,478.38		21,746.85-	4,731.53
10/03/25	DIVIDEND ON 2,016.396 SHS AT .0149 PER SHARE PAYABLE 10/06/2025		30.04		
12/17/25	DIVIDEND ON 2,016.396 SHS AT .0059 PER SHARE PAYABLE 12/16/2025		11.90		
12/17/25	CAP GAINS DIVIDEND ON 2,016.396 SHS AT .4287 PER SHARE PAYABLE 12/16/2025	864.43			864.43
12/17/25	CAP GAINS DIVIDEND ON 2,016.396 SHS AT .5622 PER SHARE PAYABLE 12/16/2025		1,133.62		1,133.62
04/21/25	OAKMARK INTERNATIONAL R6 PURCHASED 727.286 SHS ON 04/17/2025 AT 26.40	19,200.34-		19,200.34	
05/14/25	SOLD 110.769 SHS ON 05/13/2025 AT 29.05	3,217.83		3,016.24-	201.59
09/12/25	PURCHASED 721.846 SHS ON 09/11/2025 AT 31.25	22,557.69-		22,557.69	
12/12/25	DIVIDEND ON 2,609.759 SHS AT .7061 PER SHARE PAYABLE 12/11/2025		1,842.75		
02/06/25	ISHARES CORE 1-5 YEAR BOND ETF DIVIDEND ON 1,014 SHS AT .163154 PER SHARE PAYABLE 02/06/2025		165.44		

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
02/19/25	SOLD 483 SHS ON 02/18/2025 AT 47.90 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 7.73 EXPENSES PAID 0.65	23,127.32		23,442.37-	315.05-
03/06/25	DIVIDEND ON 531 SHS AT .156778 PER SHARE PAYABLE 03/06/2025		83.25		
04/04/25	DIVIDEND ON 531 SHS AT .165987 PER SHARE PAYABLE 04/04/2025		88.14		
04/21/25	SOLD 47 SHS ON 04/17/2025 AT 48.2284 THRU TD SECURITIES (USA) LLC COMMISSIONS PAID 0.75 EXPENSES PAID 0.06	2,265.92		2,270.47-	4.55-
05/06/25	DIVIDEND ON 484 SHS AT .163818 PER SHARE PAYABLE 05/06/2025		79.29		
06/05/25	DIVIDEND ON 484 SHS AT .17051311 PER SHARE PAYABLE 06/05/2025		82.53		
07/07/25	DIVIDEND ON 484 SHS AT .168099 PER SHARE PAYABLE 07/07/2025		81.36		
08/06/25	DIVIDEND ON 484 SHS AT .170015 PER SHARE PAYABLE 08/06/2025		82.29		
09/05/25	DIVIDEND ON 484 SHS AT .170936 PER SHARE PAYABLE 09/05/2025		82.73		
10/06/25	DIVIDEND ON 484 SHS AT .167954 PER SHARE PAYABLE 10/06/2025		81.29		
11/06/25	DIVIDEND ON 484 SHS AT .171984 PER SHARE PAYABLE 11/06/2025		83.24		
12/04/25	DIVIDEND ON 484 SHS AT .169305 PER SHARE PAYABLE 12/04/2025		81.94		
12/24/25	DIVIDEND ON 484 SHS AT .169902 PER SHARE PAYABLE 12/24/2025		82.23		
01/06/25	PIMCO INCOME FUND I INTEREST PAYABLE 01/02/2025 TAX EFFECTIVE 12/31/2024		193.57		
02/04/25	INTEREST PAYABLE 02/03/2025		193.56		
02/20/25	PURCHASED 1,287.853 SHS ON 02/19/2025 AT 10.63	13,689.88-		13,689.88	
03/04/25	INTEREST PAYABLE 03/03/2025		221.31		
04/03/25	INTEREST PAYABLE 04/01/2025		264.41		
04/21/25	SOLD 389.503 SHS ON 04/17/2025 AT 10.56	4,113.15		4,814.26-	701.11-
05/02/25	INTEREST PAYABLE 05/01/2025		257.00		

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
06/03/25	INTEREST PAYABLE 06/02/2025		242 .97		
07/02/25	INTEREST PAYABLE 07/01/2025		243 .05		
08/04/25	INTEREST PAYABLE 08/01/2025		242 .99		
09/04/25	INTEREST PAYABLE 09/02/2025		242 .98		
10/02/25	INTEREST PAYABLE 10/01/2025		242 .85		
11/05/25	INTEREST PAYABLE 11/03/2025		242 .92		
11/24/25	RECEIVED FROM DIVIDEND		0 .06		
12/02/25	INTEREST PAYABLE 12/01/2025		242 .99		
	VANGUARD DIVIDEND APPRECIATION ETF				
03/31/25	DIVIDEND ON 293 SHS AT .9377 PER SHARE PAYABLE 03/31/2025		274 .75		
04/21/25	PURCHASED 10 SHS ON 04/17/2025 AT 185.01 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 0.16	1,850 .26-		1,850 .26	
07/02/25	DIVIDEND ON 303 SHS AT .8712 PER SHARE PAYABLE 07/02/2025		263 .97		
10/01/25	DIVIDEND ON 303 SHS AT .8647 PER SHARE PAYABLE 10/01/2025		262 .00		
12/24/25	DIVIDEND ON 303 SHS AT .884400135 PER SHARE PAYABLE 12/24/2025		267 .97		
	VANGUARD MORTGAGE-BACKED SECURITIES INDEX				
02/03/25	DIVIDEND ON 674.822 SHS AT .0633 PER SHARE PAYABLE 02/03/2025		42 .72		
03/03/25	DIVIDEND ON 674.822 SHS AT .0631 PER SHARE PAYABLE 03/03/2025		42 .58		
04/01/25	DIVIDEND ON 674.822 SHS AT .0652 PER SHARE PAYABLE 04/01/2025		44 .00		
04/21/25	SOLD 38.993 SHS ON 04/17/2025 AT 18.28	712 .79		738 .92-	26 .13-
05/01/25	DIVIDEND ON 635.829 SHS AT .0787 PER SHARE PAYABLE 05/01/2025		50 .04		
06/02/25	DIVIDEND ON 635.829 SHS AT .0639 PER SHARE PAYABLE 06/02/2025		40 .63		
07/01/25	DIVIDEND ON 635.829 SHS AT .0647 PER SHARE PAYABLE 07/01/2025		41 .14		

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
08/01/25	DIVIDEND ON 635.829 SHS AT .0649 PER SHARE PAYABLE 08/01/2025		41.27		
09/02/25	DIVIDEND ON 635.829 SHS AT .0657 PER SHARE PAYABLE 09/02/2025		41.77		
10/01/25	DIVIDEND ON 635.829 SHS AT .0609 PER SHARE PAYABLE 10/01/2025		38.72		
11/03/25	DIVIDEND ON 635.829 SHS AT .0683 PER SHARE PAYABLE 11/03/2025		43.43		
12/01/25	DIVIDEND ON 635.829 SHS AT .0643 PER SHARE PAYABLE 12/01/2025		40.88		
12/18/25	DIVIDEND ON 635.829 SHS AT .0637 PER SHARE PAYABLE 12/18/2025		40.50		
03/28/25	VANGUARD LARGE CAP INDEX ADM DIVIDEND ON 792.333 SHS AT .4451 PER SHARE PAYABLE 03/28/2025		352.67		
04/21/25	SOLD 123.649 SHS ON 04/17/2025 AT 122.31	15,123.53		5,058.38-	10,065.15
05/14/25	SOLD 46.014 SHS ON 05/13/2025 AT 136.63	6,286.88		1,535.59-	4,751.29
07/01/25	DIVIDEND ON 622.67 SHS AT .425 PER SHARE PAYABLE 07/01/2025		264.63		
09/30/25	DIVIDEND ON 622.67 SHS AT .4091 PER SHARE PAYABLE 09/30/2025		254.73		
12/23/25	DIVIDEND ON 622.67 SHS AT .4303 PER SHARE PAYABLE 12/22/2025		267.94		
03/28/25	VANGUARD MID CAP INDEX ADMIRAL DIVIDEND ON 141.518 SHS AT 1.4365 PER SHARE PAYABLE 03/28/2025		203.29		
04/21/25	SOLD 54.133 SHS ON 04/17/2025 AT 304.23	16,468.80		7,543.46-	8,925.34
05/14/25	SOLD 5.99 SHS ON 05/13/2025 AT 334.87	2,005.90		834.71-	1,171.19
07/01/25	DIVIDEND ON 81.395 SHS AT 1.3184 PER SHARE PAYABLE 07/01/2025		107.31		
09/30/25	DIVIDEND ON 81.395 SHS AT 1.2715 PER SHARE PAYABLE 09/30/2025		103.49		
12/23/25	DIVIDEND ON 81.395 SHS AT 1.4133 PER SHARE PAYABLE 12/22/2025		115.04		

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
04/21/25	WILLIAM BLAIR SMALL CAP VALUE CLASS I SOLD 345.323 SHS ON 04/17/2025 AT 25.24	8,715.94		10,093.78-	1,377.84-
09/12/25	PURCHASED 189.433 SHS ON 09/11/2025 AT 30.17	5,715.18-		5,715.18	
12/19/25	DIVIDEND ON 542.651 SHS AT .23969 PER SHARE PAYABLE 12/18/2025		130.07		
12/19/25	CAP GAINS DIVIDEND ON 542.651 SHS AT .37269 PER SHARE PAYABLE 12/18/2025	202.24			202.24
12/19/25	CAP GAINS DIVIDEND ON 542.651 SHS AT .06746 PER SHARE PAYABLE 12/18/2025		36.61		36.61
04/21/25	WISDOMTREE US QUALITY GROWTH ETF SOLD 81 SHS ON 04/17/2025 AT 41.8376 THRU CLEAR STREET LLC COMMISSIONS PAID 1.30 EXPENSES PAID 0.10	3,387.45		3,296.38-	91.07
05/14/25	SOLD 81 SHS ON 05/13/2025 AT 49.03 THRU NATL FINANCIAL SERVICES CORP COMMISSIONS PAID 1.29 EXPENSES PAID 0.11	3,970.03		3,296.37-	673.66
12/30/25	DIVIDEND ON 689 SHS AT 0.05 PER SHARE PAYABLE 12/30/2025		34.45		
01/06/25	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		6,778.99-		
04/07/25	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		2,191.52-		
05/12/25	PAID TO UNITED STATES TREASURY 2025 FORM 990-PF ESTIMATE	359.88-			
05/15/25	PAID TO LA CROSSE PUBLIC LIBRARY BALANCE OF PREVIOUS YEAR REQUIRED DISTRIBUTION	18,758.51-			
05/27/25	RECEIVED FROM UNITED STATES TREASURY 2024 FIDUCIARY FEDERAL TAX REFUND	60.47			
07/07/25	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		1,268.27-		
10/06/25	DISTRIBUTION TO LA CROSSE PUBLIC LIBRARY QUARTERLY PAYMENT OF NET INCOME		1,885.20-		

ACCOUNT NUMBER: **1045000353**

JANUARY 01, 2025 TO DECEMBER 31, 2025

TRANSACTION STATEMENT (CONTINUED)

DATE	DESCRIPTION	PRINCIPAL CASH	INCOME CASH	COST	GAIN / LOSS
	NET TRUST POINT FEE FOR THE PERIOD	3,567.96-	3,567.90-		
	NET TAX PREPARATION FEE FOR THE PERIOD	500.00-	500.00-		
12/31/25	ENDING BALANCE	8,560.29-	8,560.29	517,883.46	36,790.58

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.

TRUSTEES' SPECIAL AGENCY FUND REPORT

2025

Total 2025

BEQUESTS	0
INCOME TOTAL	\$69,854
DISBURSEMENTS	-16,014
CHANGE IN MARKET VALUE	47,265
REALIZED GAIN/LOSS	-11,463
FEES	3,975
BOARD EXPENDITURES	14,729
BALANCE	1,025,289

\$1100 TWO RETIREMENT REIMBURSEMENTS
\$5000 DIRECTOR'S HOSPITALITY

TOTAL \$3000 IN HONOR OF SHANNEON GRANT:
\$2000 STAFF APPRECIATION,
\$1000 SPECIAL TRUSTEES FURNITURE

CHAPTER 2, ARTICLE V
DIVISION 2. - CODE OF ETHICS

FOOTNOTE(S):

— (6) —

State Law reference— Code of ethics for public officers and employees, Wis. Stat. § 19.41 et seq.; code of ethics for local government officials, employees and candidates, Wis. Stat. § 19.59.

• **Sec. 2-126. - Definitions.**

The following words, terms and phrases, when used in this division, shall have the meanings ascribed to them in this section, except where the context clearly indicates a different meaning:

Anything of value means any money or property, favor, service, payment, advance, forbearance, loan or promise of future employment, but does not include compensation and expenses paid by the City, fees, honorariums and expenses which are permitted and reported under Wis. Stat. § 19.56, political contributions which are reported under Wis. Stat. ch. 11 or hospitality extended for a purpose unrelated to City business by a person other than an organization.

Public employee means any person excluded from the definition of a public officer who is employed by the City of La Crosse.

Public officer means all City officers as defined in Wis. Stat. § 62.09 and all members of Boards, Commissions and Agencies established or appointed by the Mayor or Common Council, whether paid or unpaid.

(Code 1980, § 2.48(A))

Cross reference— Definitions and rules of construction, § 1-2.

• **Sec. 2-127. - Declaration of policy.**

It is declared that high moral and ethical standards among City officers and employees are essential to the conduct of good representative government and that a Code of Ethics for the guidance of Public officers and employees will help them avoid conflicts with improved standards of public service and will promote and strengthen the confidence of the residents of this City in their public officers and employees.

(Code 1980, § 2.48(B))

• **Sec. 2-128. - Distribution of division.**

(a)

The City Clerk shall cause to be distributed to each public officer and employee a copy of this division before entering upon the duties of the public officer or employee's office or employment.

(b)

Each public officer, the President of the Common Council, the Chair of each board, commission or agency and the head of each department shall, between January 1 and January 31 each year, review the provisions of this division and with fellow Council, board, commission, agency members or subordinates, as the case may be, and certify to the City Clerk by February 15 that such annual review had been undertaken. A copy of this division shall be continuously posted on each department bulletin board wherever situated.

(Code 1980, § 2.48(F))

• **Sec. 2-129. - Ethics Board.**

(a)

Membership.

(1)

The Ethics Board shall be composed of five voting members. The members shall be citizens chosen from the private sector who shall not have an affiliation with City government in any capacity. The members shall be appointed by the Mayor with the approval of the majority vote of the City Council.

(2)

Terms of office of the citizen members shall be three years.

(b)

Officers and staff.

(1)

The Ethics Board shall have its own Chair and Vice-Chair.

(2)

The City Attorney shall furnish the Ethics Board whatever legal assistance, which may become necessary. The Ethics Board may determine the need for private counsel.

(c)

Advisory opinions. Any person governed by this Code may apply in writing to the Ethics Board for an advisory opinion. Applicants shall present their interpretation of the facts at issue and of the applicability of the provision of this Code before the advisory opinion is rendered. All opinions shall be in writing and adopted by the Ethics Board by resolution. The Ethics Board's deliberations and action upon such applications shall be in meetings not open to the public, but notice of such meetings shall be given pursuant to Wis. Stat. § 19.84. Record of the Ethics Board opinions, opinion request and investigations of violations may be closed to public inspection, as permitted by Wis. Stat. ch. 19. The Ethics Board, however, may make such records public with the consent of the applicant.

(Code 1980, § 2.48(G)(1), (G)(2))

Cross reference—Boards and commissions, ch. 2, art. X.

• **Sec. 2-130. - Violations and complaints.**

(a)

The City Clerk shall accept from any person, except a member of the Ethics Board, a signed original complaint that states the name of the official or employee alleged to have violated this Code and that sets forth the material facts involved in the allegation. The City Clerk shall forward the original complaint to the Ethics Board Chair within three working days.

(b)

Time limitations. No action may be taken on any complaint that is filed more than one year after a violation of this division is alleged to have occurred.

(c)

Ethics Board procedures. Following the receipt of a complaint:

(1)

The Ethics Board shall notify the accused within ten calendar days.

(2)

The Ethics Board shall convene within 20 calendar days.

(3)

The Ethics Board may make preliminary investigations with respect to alleged violation of this Code. A preliminary investigation shall not be initiated unless the accused official or employee is notified in writing within ten calendar days from the initial meeting. The notice shall state the purpose of the investigation and the individual's specific action or activities to be investigated.

(4)

The Ethics Board shall make every effort to conclude within 120 calendar days.

(d)

Hearings. If the Ethics Board finds that probable cause exists for believing the allegations of the complaint, the Ethics Board may issue an order setting a date for a hearing. If the Ethics Board elects to hold a hearing, the Ethics Board shall give the accused at least 20 calendar days' notice of the hearing date. Such hearing shall be conducted pursuant to the contested case hearing requirements of Wis. Stat. ch. 227 at open session unless the accused petitions for a hearing closed to the public and good cause to close the hearing is shown.

(e)

Right of representation. During all stages of an investigation or proceeding conducted under this section, the accused or any person whose activities are under investigation is entitled to be represented by counsel of personal choice and at personal expense.

(f)

Due process. The accused or the accused's representative shall have an adequate opportunity to:

(1)

Examine all documents and records to be used at the hearing within a reasonable time before the date of the hearing as well as during the hearing;

(2)

Have witnesses heard;

(3)

Establish all pertinent facts and circumstances; and

(4) Question or refute any testimony or evidence, including the opportunity to confront and cross-examine adverse witnesses.

(g) Power to subpoena and administer oaths. The Ethics Board shall have the power to administer oaths and compel the attendance of witnesses by issuing subpoenas as granted other boards and commissions.

(h) Vote of the Ethics Board. The majority vote of the Ethics Board shall be required for any action taken by the Ethics Board.

(i) Evidentiary standard. If the recommendation is that a violation of this division has occurred, the Ethics Board must be convinced by clear and convincing evidence that such violation occurred.

(j) Violations.

(1) If the Ethics Board finds that a violation of this division has occurred, the Ethics Board shall report their findings in writing to the City Council, complainant, and accused, through the City Clerk, within ten working days after reaching a conclusion.

(2) If the Ethics Board determines that an official or employee has violated any provision of this Code, the Ethics Board may, as part of its report to the City Council, make any of the following recommendations:

- a. In case of an official who is an elected City Council Member, that City Council considers sanctioning, censuring or removing the person.
- b. In the case of a citizen member or other elected or appointed City officer, that the City Council consider removing the person from the committee, board or office.
- c. In the case of an employee, that the employee's appointing authority consider discipline up to and including discharge of the employee.
- d. That the City Council consider imposing a civil forfeiture in an amount not exceeding \$1,000.00 for each offense.

(3) If the Ethics Board finds that no violation has occurred, the Ethics Board shall notify the complainant, the accused, and City Clerk in writing within five working days.

(k) Penalties.

(1) If the Ethics Board files a report with the City Council finding that an official or employee has violated the Ethics Code, such report shall be referred to the Judiciary and Administration Committee for a report. The Judiciary and Administration Committee may recommend to the City Council a penalty for the violation and/or recommendation that a hearing be held on the issue of the penalty. If a hearing is recommended by the Judiciary and Administration Committee, then the Mayor shall schedule a hearing before the City Council and cause notice to be mailed to the interested parties, including the person accused of the violation at least ten days prior to the date set for the hearing. At the hearing, the evidence in support of the penalty recommendations by the Ethics Board and/or Judiciary and Administration Committee shall be presented by the City Attorney or by a member of the City Attorney's staff. The accused, who may appear in person or who may be represented by an attorney, shall be entitled to present the City Council such evidence as may be relevant, competent and material in regard to the penalty for the violation.

(2)

Upon completion of the hearing or other proceeding by the City Council, judgment shall be entered by the City Council determining the penalty for violation of this division found by the Ethics Board and may include a recommendation of discipline of the person to the person's appointing authority up to and including discharge from employment or removal from office, in accordance with Wis. Stat. Ch. 17

(3)

Any person violating this division may be subject to a Class A forfeiture for each offense.

(Code 1980, § 2.48(G)(3)—(G)(12))

Cross reference— Class A forfeitures, § 1-7.

- **Sec. 2-131. - Standards of conduct.**

(a)

There are certain provisions of the Wisconsin Statutes which should, while not set forth herein, be considered an integral part of any Code of Ethics.

(b)

Accordingly, the provisions of the following sections of the Wisconsin Statutes are made a part of this division and shall apply to public officers and public employees whenever applicable, to-wit:

Wis. Stat. § 946.10 - Bribery of Public Officers and Employees

Wis. Stat. § 946.11 - Special Privileges from Public Utilities

Wis. Stat. § 946.12 - Misconduct in Public Office

Wis. Stat. § 946.13 - Private Interest in Public Contract Prohibited

(Code 1980, § 2.48(C))

- **Sec. 2-132. - Disclosures.**

In addition to the foregoing statutory provisions, the following disclosure and related requirements are hereby established:

(1)

Disclosure of interest in legislation. To the extent that a member of the Common Council and any public officer or employee of the City of La Crosse knows thereof, such member, officer or employee, whether paid or unpaid, who participates in the discussion or gives official opinion to the Council on any legislation before the Council, shall publicly disclose the nature and extent of any direct or indirect financial or other private interest such person has in such legislation.

(2)

Disclosure of interest in other matters. To the extent that a member of a board, commission or agency, and any other public officer or public employee of the City of La Crosse knows thereof, such member, officer or employee, whether paid or unpaid, who participates in discussion or gives official opinion to any such board, commission or agency on any matter before it, shall publicly disclose the nature and extent of any direct or indirect financial or other private interest such person has in such matters.

(3)

Confidential information. No public officer or employee may intentionally use or disclose information gained in the course of or by reason of such public officer or employee's official position or activities in any way that could result in receipt of anything of value for such person, or such person's immediate family as defined by Wis. Stat. § 19.42, or for any other person or organization, if the information has not been communicated to the public or is not public information.

(4)

Special privileges. No public officer or employee may use or attempt to use any public position to influence or gain unlawful benefits, advantages or privileges for the public officer or employee or others.

(5)

Conduct after termination of employment. No public officer or employee, after the termination of service or employment with the City, shall appear before any Board or Agency of the City of La Crosse in relation to any case, proceeding or application in which the public officer or employee personally participated during the period of service or employment, or which was under the public officer or employee's active consideration.

(Code 1980, § 2.48(D))

- **Sec. 2-133. - Gifts and gratuities.**

(a)

No public officer or employee shall receive or offer to receive, either directly or indirectly, any gift, gratuity, or anything of value which the public officer or employee is not authorized to receive from any person, if such person:

(1)

Has or is seeking to obtain contractual or other business or financial relationships with such public employee's employer or the governmental body of the public official;

(2)

Conducts operations or activities which are regulated by such public employee's employer or the governmental body of a public official; or

(3)

Has interests which may be substantially affected by such public employee's employer or the governmental body of the public official.

The receipt of any gift, gratuity, or anything of value as denoted in this subsection (a) is contrary to the public policy of the City of La Crosse.

(b)

The following is the policy to be followed in determining whether or not public officer or employees of the City of La Crosse may attend as a guest:

(1)

It will be the choice of the official or employee to accept or not accept guest status when such individual is the primary speaker or on the program agenda as a participant in the program.

(2)

It will be the choice of the official or employee to accept or not accept guest status when such individual is honored for distinguished service.

(3)

It will be the choice of the official or employee to accept or not accept guest status when such individual attends functions in other capacities than that as an elected official or as an employee of the City.

(4)

It will be the choice of the official or employee to accept or not accept a meal at meetings which are instructional and job-related and, if the employee or official chooses to accept a meal, the cost of such should be submitted to the City of La Crosse for payment.

(Code 1980, § 2.48(E))

- **Secs. 2-134—2-164. - Reserved.**



Human Resources

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Employee Notice: Changes to the Employee Handbook for 2026

The following is a summary of the changes within the Employee Handbook Part I and Part II. For more details, please refer to the Employee Handbook. All changes are effective January 1, 2026 unless otherwise noted.

Employee Handbook, Part I

Section 5: Pay and Compensation

- a. Update clothing allowance amounts for Police Captains, Assistant Chief of Police and Chief of Police to mirror that of the LPPNSA AND LPPSA CBA.
- b. Added a notation that to the clothing allowance section that *“all other clothing allowances must be pre-approved in the department’s budget and approved by Human Resources prior to purchasing.”*
- c. Added a **Safety Footwear Reimbursement** program effective January 1, 2026, for certain positions where safety footwear is required (full policy in Handbook II).
- d. Added **Oktober Premium – Police Records Specialist** specialty pay provision for Oktoberfest weekend only per the recommendation of police management.
- e. Added a notation to the Tar Crew Pay section that *“non-exempt airport employees working on the tar crew shall receive premium pay of \$.75 per hour for the hours spent actively performing tar work. An assignment to the tar crew shall be made by airport management.”*

Section 6: Benefits

- a. Increased the number of floating holidays from one (1) to two (2) per calendar year for all non-represented staff who are eligible.
- b. Reviewed and increased the accrual rate for floating holidays for Airport Operations Coordinators from 10.1 hours to 11.2 hours per the recommendation of airport management.
- c. Reviewed and increased the accrual rate for sick leave for Airport Operations Coordinators from 10.1 hours to 11.2 hours per the recommendation of airport management.
- d. Added clarifying language that sick leave notes will only be accepted up to thirty (30) days after the use of sick leave to be deemed an excused absence.
- e. Added a Paid Parental Leave policy for non-represented employees; see attachment with full policy.
- f. Revised the vacation accrual schedule for all non-represented; see attachment with revised vacation schedule.

Minor grammatical changes and updates to job titles have been made throughout the entire handbook.

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Employee Handbook, Part II

Classification and Compensation Plan

Section 8: Performance Evaluations and Step Increases

- a. Revised the fourth bullet point from the following (a) to the following (b):
 - a. *Employees at or above the top step who meet the established performance factors shall receive a \$750 performance stipend, subject to Common Council funding.*
 - b. *When an employee reaches the maximum rate of their pay grade (step 11), they will receive the equivalent annual increase in the form of a lump sum, non-base building payment, subject to Common Council funding.*

Added a *FLSA Safe Harbor Policy* at the recommendation for legal counsel.

Added a *Safety Footwear Reimbursement Policy*.

Remove the *Voluntary Leave Donation Program for Spouse and Dependents of City Employees* policy.

Minor grammatical/formatting and job title changes have been made throughout the entire handbook as needed.



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Paid Parental Leave

Purpose:

The City of La Crosse will provide up to eight (8) weeks of paid parental leave for employees to use upon the birth or adoption of an employee's child, or placement of a foster child. The purpose of the paid parental leave is to enable the employee to care for and bond with a newborn or newly adopted or fostered child. This leave is also available to a birthing parent following a stillbirth after 20 weeks of pregnancy.

Policy:

This policy will become effective on January 1, 2026, after approval by the Finance and Personnel Committee and is not retroactive. This paid parental leave exceeds any legal requirement.

Definitions:

- a. Child(ren): Parental leave shall apply to all children under the age of 18.
- b. Paid Parental Leave: Consists of eight (8) weeks of paid time off based on the employee's regular work schedule (e.g. 8 weeks x 40 hours per week = 320 hours of paid parental leave). An equivalent number of hours will be placed in an accrual bank for the employee to utilize during their leave. The amount provided would allow the employee to be off work for an equivalent of eight calendar weeks.
- c. Parent: A person who is identified on a child(ren)'s birth certification, adoption certificate, or other legal document certifying adoption or as a foster parent. This person also serves as continuing parental/caregiver role to the child.

Qualifications for Parental Leave

1. Must be a full-time or permanent part-time, non-represented employee. Part-time, temporary, and seasonal employees ("LTE") are excluded; AND
2. Must qualify for Family Medical Leave Act ("FMLA") leave; AND
3. Must have successfully completed their initial probationary period with the City.

Exclusions from Leave

- An employee's adoption of their new spouse's child(ren).
- An employee serving as a surrogate.
- An employee serving as a sperm donor who will not be a legal parent to the child.
- Additional paid parental leave is not available if the employee has more than one birth, adoption or foster placement in a single calendar year.
- In the case of multiple births (e.g. twins, triplets, etc.) or multiple children being adopted or fostered at one time, all children are treated as one event, limited to eight (8) weeks of paid parental leave.

Use of Paid Parental Leave

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- An employee is eligible for paid parental leave once each calendar year.
- The use of paid parental leave is continuous use. No intermittent use will be approved.
- Employees will be compensated for the paid parental leave at their regular rate of pay. This rate of pay will not include any overtime or compensatory time.
- Paid parental leave will run concurrently with an state or federal family leave for which the employee is eligible.
- If both parents work for the City, each parent is eligible for eight (8) weeks of paid parental leave.
- Use of paid parental leave for adoption or foster care cannot take place prior to the physical placement of the child with the parent.
- If a City holiday falls on any of the paid parental leave dates, the employee will receive the paid parental leave in lieu of the holiday on that date. This time will count against the employees' eight (8) weeks of paid parental leave.
- Employees will continue to accrue other paid time off while using paid parental leave.
- Employees will not use their other accrue paid time off while using paid parental leave.
- Employees using paid parental leave will continue to receive the benefits they had prior to the leave.
- Outside employment, including self-employment, during paid parental leave is prohibited, and may result in disciplinary action, up to and including termination of employment.

Procedure:

Paid parental leave must be upon the birth or adoption of an employee's child, or placement of a foster child. An employee is not required to use all eight (8) weeks of paid parental leave. Any unused leave at the conclusion of the eight (8) weeks will be forfeited.

To initiate the Paid Parental Leave benefits:

1. The employee must fully complete and sign a paid parental leave form and return it to Human Resources at least thirty (30) days prior to foreseeable leave, but preferably ninety (90) days prior to the leave. It is the employee's responsibility to notify Human Resources of the actual date of the event after it is known if it differs from the anticipated date on the form.
2. The Human Resources Director will review and response to the form.
3. The employee must submit documentation required to substantiate their leave within two (2) weeks, or sooner, if possible, of the birth, adoption, or fostering of the child.
4. The supervisor will make efforts to ensure a smooth transition for the employee to return to work at the conclusion of the leave.

Required Documentation:

A copy of the child(ren)'s birth certificate, adoption certificate, or similar governmental/legal documental listing the employee as a legal parent.

Work Obligation:

An employee is required to work for the City for at least eight (8) weeks after usage of the paid parental leave. The eight-week work obligation begins on the date the employee physically returns to work after their paid parental leave or exhaustion of FMLA use; whichever is later. The City of La Crosse will seek collection of the full amount of paid parental leave for an employee who fails to return to work and fully complete the eight-week work obligation.



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The work obligation is fixed at eight weeks regardless of the amount of paid parental leave used by the employee.

Violations:

Failure to substantiate the paid parental leave with the required paperwork will result in the City seeking collection of the full amount of any paid parental leave used by the employee.

Violations, misuse, or untruthful use of the paid parental leave benefit may result in disciplinary action, up to and including discharge from employment along with the City may seek collection of the full amount of any paid parental leave used by the employee.

Employees should report possible policy violations to the Human Resources department upon knowledge of the possible violation. Paid parental leave is a benefit, and abuse will be taken seriously. Repeated abuse may result in the benefit being eliminated for all.

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Non-Represented Vacation Schedule

Below are the vacation schedules for all non-represented employees in 2025.

Non-Exempt (Hourly) | Non-Represented Employees

<i>Continuous Service</i>	<i>Vacation Benefit</i>
After one (1) year of continuous service	One (1) week
After two (2) years of continuous service	Two (2) weeks
After six (6) years of continuous service	Three (3) weeks
After ten (10) years of continuous service	Eighteen (18) days
After thirteen (13) years of continuous service	Four (4) weeks
After sixteen (16) years of continuous service	Twenty-two (22) days
After twenty (20) years of continuous service	Five (5) weeks
After twenty-six (26) years of continuous service	Twenty-six (26) days
After twenty-seven (27) years of continuous service	Twenty-seven (27) days
After twenty-eight (28) years of continuous service	Twenty-eight (28) days
After twenty-nine (29) years of continuous service	Twenty-nine (29) days
After thirty (30) years of continuous service	Six (6) weeks

Exempt (Salaried) | Non-Represented Employees

<i>Continuous Service</i>	<i>Vacation Benefit</i>
After one (1) year of continuous service	Two (2) weeks
After five (5) years of continuous service	Three (3) weeks
After ten (10) years of continuous service	Eighteen (18) days
After thirteen (13) years of continuous service	Four (4) weeks
After sixteen (16) years of continuous service	Twenty-two (22) days
After twenty (20) years of continuous service	Five (5) weeks
After twenty-six (26) years of continuous service	Twenty-six (26) days
After twenty-seven (27) years of continuous service	Twenty-seven (27) days
After twenty-eight (28) years of continuous service	Twenty-eight (28) days
After twenty-nine (29) years of continuous service	Twenty-nine (29) days
After thirty (30) years of continuous service	

City Executives | Non-Represented Employees

<i>Continuous Service</i>	<i>Vacation Benefit</i>
After six (6) months of continuous service	Three (3) weeks
After two (2) years of continuous service	Four (4) weeks
After eight (8) years of continuous service	Five (5) weeks
After fifteen (15) years of continuous service	Twenty-seven (27) days
After twenty (20) years of continuous service	Six (6) weeks



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Battalion Chiefs | Non-Represented Employees

<i>Continuous Service</i>	<i>Vacation Benefit</i>
After one (1) year of continuous service	Three (3) shift days
After three (3) years of continuous service	Six (6) shift days
After seven (7) years of continuous service	Nine (9) shift days
After fourteen (14) years of continuous service	Twelve (12) shift days
After twenty (20) years of continuous service	Fifteen (15) shift days
After twenty-six (26) years of continuous service	Sixteen (16) shift days
After twenty-seven (27) years of continuous service	Seventeen (17) shift days
After thirty (30) years of continuous service	Eighteen (18) shift days

Airport Operations Coordinator | Non-Represented Employees

<i>Continuous Service</i>	<i>Vacation Benefit</i>
After one (1) year of continuous service	2.3 shift days (56.4 hours)
After two (2) years of continuous service	4.6 shift days (112.7 hours)
After six (6) years of continuous service	6.9 shift days (169 hours)
After ten (10) years of continuous service	8.25 shift days (200.9 hours)
After thirteen (13) years of continuous service	9.2 shift days (225.4 hours)
After sixteen (16) years of continuous service	10.18 shift days (249.4 hours)
After twenty (20) years of continuous service	11.5 shift days (281.8 hours)
After twenty-six (26) years of continuous service	11.96 shift days (293 hours)
After twenty-seven (27) years of continuous service	12.42 shift days (304.3 hours)
After twenty-eight (28) years of continuous service	12.88 shift days (315.6 hours)
After twenty-nine (29) years of continuous service	13.34 shift days (326.8 hours)
After thirty (30) years of continuous service	13.8 shift days (338.1 hours)

Below are the proposed vacation schedules for all non-represented employees beginning January 1, 2026.

Non-Exempt Employees (Hourly)

Continuous Service	Days	Weeks	Hours (80)	Hours (75)
Upon Hire (*Prorated)	10	2.0	80	75.0
After two (2) years of continuous service	13	2.6	104	97.5
After three (3) years of continuous service	15	3.0	120	112.5
After five (5) years of continuous service	17	3.4	136	127.5
After eight (8) years of continuous service	18	3.6	144	135.0
After ten (10) years of continuous service	21	4.2	168	157.5
After thirteen (13) years of continuous service	22	4.4	176	165.0
After fifteen (15) years of continuous service	23	4.6	184	172.5
After twenty (20) years of continuous service	27	5.4	216	202.5
After twenty-five (25) years of continuous service	30	6.0	240	225.0
After thirty (30) years of continuous service	32	6.4	256	240.0

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Exempt (Non-City Executives) Employees (Salaried)

Continuous Service	<i>Days</i>	<i>Weeks</i>	<i>Hours (80)</i>	<i>Hours (75)</i>
Upon Hire (*Prorated)	15	3.0	120	112.5
After two (2) years of continuous service	18	3.6	144	135.0
After three (3) years of continuous service	20	4.0	160	150.0
After five (5) years of continuous service	21	4.2	168	157.5
After eight (8) years of continuous service	22	4.4	176	165.0
After ten (10) years of continuous service	25	5.0	200	187.5
After thirteen (13) years of continuous service	26	5.2	208	195.0
After fifteen (15) years of continuous service	27	5.4	216	202.5
After twenty (20) years of continuous service	31	6.2	248	232.5
After twenty-five (25) years of continuous service	34	6.8	272	255.0
After thirty (30) years of continuous service	36	7.2	288	270.0

City Executives (Salaried)

Continuous Service	<i>Days</i>	<i>Weeks</i>	<i>Hours</i>
Upon Hire (*Prorated)	20	4.0	160
After two (2) years of continuous service	22	4.4	176
After three (3) years of continuous service	24	4.8	192
After five (5) years of continuous service	26	5.2	208
After ten (10) years of continuous service	28	5.6	224
After fifteen (15) years of continuous service	30	6.0	240
After twenty (20) years of continuous service	32	6.4	256
After twenty-five (25) years of continuous service	35	7.0	280
After thirty (30) years of continuous service	37	7.4	296

Battalion Chiefs

Continuous Service	<i>Shift Days</i>	<i>Weeks</i>	<i>Hours</i>
Upon Hire (*Prorated)	9	3.0	216.0
After two (2) years of continuous service	10.8	3.6	259.2
After three (3) years of continuous service	12	4.0	288.0
After five (5) years of continuous service	12.6	4.2	302.4
After eight (8) years of continuous service	13.2	4.4	316.8
After ten (10) years of continuous service	15	5.0	360.0
After thirteen (13) years of continuous service	15.6	5.2	374.4
After fifteen (15) years of continuous service	16.2	5.4	388.8
After twenty (20) years of continuous service	18.6	6.2	446.4
After twenty-five (25) years of continuous service	20.4	6.8	489.6
After thirty (30) years of continuous service	21.6	7.2	518.4



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Airport Operations Coordinator

Continuous Service	<i>Shift Days</i>	<i>Weeks</i>	<i>Hours</i>
Upon Hire (*Prorated)	4.6	2.0	112.8
After two (2) years of continuous service	6.0	2.6	146.6
After three (3) years of continuous service	6.9	3.0	169.2
After five (5) years of continuous service	7.8	3.4	191.8
After eight (8) years of continuous service	8.3	3.6	203.0
After ten (10) years of continuous service	9.7	4.2	236.9
After thirteen (13) years of continuous service	10.2	4.4	248.2
After fifteen (15) years of continuous service	10.7	4.6	259.4
After twenty (20) years of continuous service	12.5	5.4	304.6
After twenty-five (25) years of continuous service	13.9	6.0	338.4
After thirty (30) years of continuous service	14.8	6.4	361.0

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Library Handbook Updates

Per City of La Crosse Changes 2026

1. Add a Safety Footwear Reimbursement program effective January 1, 2026, for certain positions where safety footwear is required (Facilities Personnel).
 - a. Recommendation: Adopt
2. Increase the number of floating holidays from three (3) to four (4) per calendar year for all nonrepresented staff who are eligible.
 - a. Recommendation: Adopt
3. Add a Paid Parental Leave policy for non-represented employees; see attachment with full policy.
 - a. Recommendation: Adopt
4. Revised the vacation accrual schedule for all non-represented; see attachment with full revised vacation schedule.
5. Classification and Compensation Plan Section 8: Performance Evaluations and Step Increases
 - a. Revised the fourth bullet point from the following (a) to the following (b): a. Employees at or above the top step who meet the established performance factors shall receive a \$750 performance stipend, subject to Common Council funding.
 - b. When an employee reaches the maximum rate of their pay grade (step 11), they will receive the equivalent annual increase in the form of a lump sum, non-base building payment, subject to Common Council funding.
6. NON-Exempt Vacation Schedule
 - a. The Library's schedule is more generous over the course of the first 20 years of employment for hourly staff. This was calculated by the number of vacation hours offered per year for 20 years of employment.
 - i. LPL: 20 years=2,320 hours vs. COLC: 2184
 - b. After 20 and up through 25 years of service the city adds hours.
 - i. LPL: 21-25 years of service=2920 hours vs. COLC: 21-25 years of service=3182 hours.
 - c. **Options: Keep LPL as is, adjust to match COLC, adjust at 20 year of service.**
 - i. Recommendation: LPL could add an additional week after 20 years of service and again after 25. This would add appreciation and

recognition for those who choose to stay with the organization for what is essentially their entire career.

7. Exempt Vacation Schedule

- a. The LPL Vacation schedule is more generous over the course of 26 years than the city for Exempt staff as well as for Managers and Executive level staff.
 - i. LPL: 26 years of service=4,480 vacation hours
 - ii. COLC: 26 years of service=3,736
- b. Options: No change, adjust to match COLC.**
 - i. Recommendation: No change

FEASIBILITY STUDY PROPOSAL

November 17, 2025

For:

La Crosse Public Library
La Crosse, WI

Submitted by:

Fast Forward Libraries
1203 W. John Street
Champaign, IL 61821
fastforwardlibraries.com

Table of Contents

Firm Information	3
Primary Contact.....	3
Relevant Project Team Members	3
About Fast Forward Libraries	3
References.....	3
Firm Experience	4
Who We Are	4
Notable Clients	4
Project Personnel	6
Amanda E. Standerfer, MA, MLIS	6
Cindy Fesemyer, MA, MLIS.....	6
Laura Huddleston, MLIS	7
Kirstin Gebhart, MA.....	7
Project Approach.....	8
Work Plan	9
Budget and Timeline.....	12
Travel Note	14
Client List	15
Appendix A, Resumes	18



Firm Information

Primary Contact

Amanda E. Standerfer, Founder and Lead Consultant

amanda@standerferconsulting.com

(217) 821-2880

Relevant Project Team Members

Amanda Standerfer, Founder and Lead Consultant

Cindy Fesemyer, Collaborating Consultant

Laura Huddleston, Associate Consultant

Kirstin Gebhart, Assistant Consultant

About Fast Forward Libraries

[Fast Forward Libraries LLC](#) is a woman-owned consulting group based in Champaign, Illinois. **We have provided consulting services to libraries and nonprofits since 2002** using the name Fast Forward Libraries since 2018 (incorporating as a single-owner LLC in January 2022). We also work under a DBA, [Alliance for Library Impact](#), established to serve library-support organizations of all kinds — systems, cooperatives, consortia, associations, and state libraries, among others.

Strategic planning processes make up the bulk of our work, we have also worked on several organizational development and fundraising projects, capacity-building projects, and staff development and training.

Included you will find our full [Client List](#) and below you will find our references — we are proud to share our full list of clients and are happy to provide contact information or process details for any listed, just ask!

References

Galesburg Public Library Foundation

Heather Sipes, Executive Director

(309) 343-6118 ext. 1303

heather.sipes@thegplf.org

Grand Prairie Friends

Sarah Livesay, Executive Director

(217) 469-0289

sarah@grandprairiefriends.org

Indian Trails Public Library District Foundation

Brian Shepard, Executive Director

(847) 279-2202

bshepard@indiantrailslibrary.org



Firm Experience

We are thrilled with the knowledgeable and experienced team we have assembled for this project. **Our firm is distinct because we combine a deep knowledge of libraries with extensive experience in philanthropy.** Of the four consultants prepared to take on this project, three hold a master's degree in library science, three have served as library Trustees, and all four have worked in libraries. All four have spent a portion of their careers in fundraising and philanthropy, and all have facilitated fundraising campaigns specifically for libraries. Further, all four have experience in various elements of major library renovation projects. **This unique experience sets our team apart as we are positioned to approach campaign readiness and strategic development with lived experience in both general philanthropy and library giving — not to mention an understanding of how fundraising can impact library operations.**

Who We Are

Fast Forward Libraries is comprised of the founder and lead consultant, Amanda Standerfer, and two staff members, Laura Huddleston and Kirstin Gebhart, and brings together consultants to work on various projects. For this project, we are looking forward to working with Cindy Fesemyer, with whom we have worked extensively.

All members of our team have worked in philanthropy — Amanda and Laura spent a portion of their long careers working for the [Lumpkin Family Foundation](#) based in the Midwest, but also giving grants nationwide. Amanda also has worked for a community foundation and served as the Executive Director of the [Alliance of Illinois Community Foundations](#). Kirstin assisted and led campaigns for higher education institutions and national nonprofits before transitioning to libraries. Cindy spent the first part of her career working for nonprofits, including leading development projects, before transitioning to working in libraries and leading fundraising efforts while the director of a public library in Wisconsin. Amanda most recently served as the director of community engagement for the Urbana Free Library in Illinois which included oversight of the library's foundation and their annual campaigns and donor development. Cindy Fesemyer was part of the team that developed the La Crosse Public Library's current strategic plan and brings intimate knowledge of the local area and library to the project.

Notable Clients

Our clients range in size and are geographically dispersed across the country. From the Orange County Library System in Florida, which serves over 1.4 million residents, to the Harnett County Public Library in North Carolina, with just over 140,000 residents, to Morton Public Library District in Illinois, serving about 17,000 residents, we adapt our process to meet each library where they are and address their community's unique needs.

In philanthropic support, we have most recently worked with the **Grand Prairie Friends** — an environmental nonprofit with a mission to preserve and restore natural communities in east-central Illinois. In the process of drafting for them a new strategic plan, a special focus was placed on fundraising and donor cultivation, a strategic direction that is essential to their existence.

The Fast Forward Libraries team is currently in the process of assisting the **Galesburg Public Library Foundation** in the development of a strategic plan and associated activity plan — both will provide the Foundation with clear direction and a path to fulfillment of their stated goals. In tandem with plan development (through survey administration, Board-member interviews, demographic analysis, and interviews with the local community foundation) we provided a recommendation report for long-term sustainability of the organization and the feasibility of future campaigns.



We have also worked with the **Indian Trails Public Library District Foundation** for almost eight years to understand their community's capacity for giving and develop fundraising strategies to support their capital and annual giving campaigns. We have developed three strategic plans for the Indian Trails Public Library District, so the work we have done with their Foundation has helped them align their strategy with the funding needed to have impact in their community.

In addition to these three recent clients, we have also provided capacity building consultation and fundraising planning for the **Palatine Public Library District Foundation**, the **Grayslake Area Public Library Foundation**, and the **Las Vegas-Clark County Library District Foundation**. Amanda has also provided fundraising training to library Boards and foundation Boards across the country.

You will see that our [client list](#) contains a myriad of nonprofits, library systems, and library foundations with whom we have worked on strategic plans — in all cases, fundraising was a major focus and consideration in the development of their plans. In these plans — thanks to our team's understanding of philanthropy — we have analyzed giving data, demographic data, campaign potential, and community capacity for giving in many of these projects.

In all of our projects, Fast Forward Libraries aims to be a neutral process facilitator and partner to maximize community and stakeholder input, reflection, learning. This approach is essential to fully understand each library's — and each community's — capacity for change and, in this case, financial support.



Project Personnel¹



Amanda E. Standerfer, MA, MLIS

Amanda's passion is helping libraries and nonprofit organizations advance so they can create meaningful impact in their communities. Since 2002, Amanda has served as a consultant and facilitator, working with libraries, nonprofits, and small businesses on strategic planning, fundraising, organizational development, and capacity building (operating as a sole proprietor until formalizing as Fast Forward Libraries LLC in early 2022).

Amanda was most recently the director of community engagement for [The Urbana Free Library \(IL\)](#). She has spent about half of her career working in philanthropy (as program officer for [The Lumpkin Family Foundation](#) based in Mattoon, IL and as program director with the [Southeastern Illinois Members Foundation](#), serving Effingham and Mattoon, IL) and the other half in libraries (as head of the Adult Division at the [Decatur Public Library \(IL\)](#) and as director of the [Effingham Public Library \(IL\)](#)). She loves melding her library and philanthropy knowledge — a self-proclaimed “philanthro-brarian.”

Amanda has twice been elected to the Board of the [Illinois Library Association](#) (ILA), most recently completing a three-year term in 2016. Amanda was also selected as a member of the first class of *Synergy: The Illinois Library Leadership Initiative* and one of only two librarians ever selected for participation in *Leadership Illinois*.

Amanda holds a bachelor of arts and a master of arts in history from [Eastern Illinois University](#), as well as a master of science in library and information science from the [University of Illinois at Urbana-Champaign](#). Learn more about Amanda on [LinkedIn](#).

Amanda is the lead consultant for this project and project manager. She will manage all aspects of the process except for the focus groups and interviews.



Cindy Fesemyer, MA, MLIS

Helping organizations see the big picture as they help their communities reach their aspirations is Cindy Fesemyer's passion as the principal of [Fesemyer Consulting, LLC](#). Community engagement, qualitative assessment, strategic planning, engaged leadership, director coaching, and staff and trustee trainings are her areas of expertise. She also teaches continuing education courses for the [UW-Madison iSchool](#) and sits on various committees of the [Public Library Association](#).

Previously she was employed at the Wisconsin State Library as the adult and community services consultant and served for seven years as director of the [Columbus Public Library \(WI\)](#) which was named [a finalist for Library Journal's 2017 Best Small Library in America](#). She served eight years as a Trustee for the [Madison Public Library](#).

After 14 years managing nonprofits, Cindy earned her MLIS from UW-Madison in 2012. She also earned dual master's in English literature and teaching writing from Humboldt State University.

Cindy is the lead consultant for the focus groups and interviews.

¹ Personnel resumes are provided as Appendix A.





Laura Huddleston, MLIS

Laura Huddleston is an associate consultant with Fast Forward Libraries. She has a special interest in the “how” of public libraries and loves to learn about ways they can thrive to benefit patrons and communities.

For ten years, Laura led the children’s department at the [Mattoon Public Library](#). She helped design and launch MPL’s inaugural Book Buggy mobile library to reach underserved youth and piloted the First Grade, First Card program to bring library cards to local first-graders. Laura served on the

[AISLE Monarch Award Committee](#) and received a 20 Under 40 Award from the *Mattoon Journal Gazette*.

Laura recently served as program officer for community engagement and organizational learning at the [Lumpkin Family Foundation](#) where she led new efforts in trust-based philanthropy, impact evaluation, and internal learning including a facilitated EDI process for Board and staff.

Laura currently serves as a trustee of the [Mattoon Public Library](#) and as an advisor for the [Coles County Peace and Justice Fund](#). She holds a bachelor’s degree in Spanish and secondary education from Eastern Illinois University and an MLIS from Indiana University.

Laura provides research and logistical support, supports community input elements, and manages the development of the Feasibility Study and other plan deliverables.



Kirstin Gebhart, MA

Kirstin Gebhart is an assistant consultant with Fast Forward Libraries. She is a communications and development professional who has coordinated fundraising and communications campaigns for a variety of industries, from higher education to nonprofits and libraries.

She honed her communications skills during her time as the senior director of communications and member services at the [National Field Hockey Coaches Association](#). Her fundraising skills were developed as an engagement communications specialist at [Penn State University](#) during

their [most recent multi-year campaign](#) which generated over \$2.2 billion. Kirstin served as the development and communications manager for [The Urbana Free Library \(IL\)](#), overseeing their annual campaigns and the development of their recent renovation project. She recently she graduated from SUNY Brockport with her master’s degree in American history.

Kirstin manages the Library Strategic Capacity Assessment and provides research and project management support.



Project Approach

The La Crosse Public Library seeks a consultant to conduct a comprehensive feasibility study to assess donor capacity, campaign readiness, and fundraising potential for a renovation project.

Amanda, Laura, and Kirstin from Fast Forward Libraries all have deep philanthropy experience and our collaborating consultant, Cindy Fesemyer, also has extensive philanthropy experience and is intimately familiar with the La Crosse community, having helped develop the library's current strategic plan. By combining our knowledge of effective fundraising strategy, our understanding of essential giving-capacity data, well-honed community and library staff assessment practices, and a familiarity with the La Crosse community, our team is prepared to conduct a well-rounded feasibility study and provide a clear roadmap to implementing fundraising recommendations.

Our process is organized into three phases: Learn, Dream, Do.

In **Phase I**, or the "Learn" phase, our team will devote significant time to assessing the community's and the library's capacity for supporting a \$7 million capital campaign. Through a giving-focused community survey, targeted focus groups, interviews with library leadership and other stakeholders, a Board and staff strategic capacity assessment, and a robust philanthropic capacity assessment, we will develop a thorough Feasibility Study to provide library leaders and our consulting team with the information needed to make decisions about fundraising direction at the library.

In **Phase II**, or the "Dream" phase, we will reflect on the Feasibility Study and begin to strategize with select library leaders about how the library can fulfill its fundraising goals.

Finally, in **Phase III** — the "Do" phase — our consulting team will synthesize both the results of the feasibility study and the discussions from the Leadership Workshop in Phase II to develop recommendations and a detailed strategy to maximize the library's fundraising opportunities. An implementation guide and planning meeting will complement the recommendations to ensure the library has a plan for seeing the strategy through.

The results of this project will be a comprehensive Feasibility Study and a fundraising strategy that accounts for the community's capacity for giving, and the library's capacity for facilitating a capital campaign. Throughout the process it is essential to engage both the community and library Board and staff to ensure that the campaign is achievable with minimal impact on the delivery of library services.



Work Plan

Phase I: Learn

Here, we will evaluate the library's readiness to facilitate a capital campaign, assess the community and donor capacity for giving, and connect with local giving organizations to identify all pathways for fundraising.

Project Kick Off

First, we will meet with the library director and select leaders (library staff and/or Board members) to review the proposed process and review options for the community survey, focus groups, interview, and strategic capacity assessment. This group will be asked to weigh in on various elements throughout the process (via email) and the director will meet with Amanda via Zoom at least monthly for project updates.

Community Survey

Gathering broad community feedback with a focus on capacity for giving and fundraising interest.

Our first step in the Learn phase is to gather community and donor feedback via a survey. Amanda and Laura (edited and approved by the library director) will develop a short community survey to gain a broad understanding the community's willingness to donate, interest in supporting the library, and any underlying concerns (which will allow the library to take them into account and address them preemptively).

Focus Groups & Interviews

Soliciting input from donors, library leadership, and local fundraising organizations.

To gather input from a diverse set of voices and delve more deeply into the library's capacity to support a fundraising campaign we will facilitate a series of focus groups and interviews led by Cindy. Two in-person focus groups will bring together one group of donors and one group of leaders from local fundraising organizations to gauge the engagement necessary to facilitate a successful campaign and the community's ability to supply the necessary funding.

Cindy will also facilitate up to 10 interviews with library leaders, Board members, and other stakeholders. She will provide them with a platform to voice their concerns, shed light on opportunities, and discuss capacity.

Philanthropic Capacity Assessment

Laura and Amanda, with assistance from Kirstin, will collect and analyze a variety of data that will inform strategy and outline the La Crosse community's capital campaign capacity.

Collected data will include, but may not be limited to:

- Review **library fundraising data** to understand current donor landscape and roster,
- Evaluate current **library fundraising operations** and **library organizational chart** to understand the current and needed infrastructure to support a capital campaign,
- Compile a **community demographic profile** to understand population, income, and affinity data.
- Complete a **benchmarking summary** comprised of other local donor-funded organizations to understand the community's capacity for giving and the mechanisms required to engage donors.
- Highlight current trends and best practices at peer libraries through a **library sector scan** focusing specifically on capital campaigns.



Library Strategic Capacity Assessment

In a holistic feasibility study, it is vital to consider about how fundraising will be operationalized across the library. An essential step is gathering input from Board and staff members related to the library's capacity for strategic fundraising as related to four key areas:

1. The **environment in which the library operates**, considering external factors influencing the community and local resident's capacity to give.
2. The **core operations** of the library and how fundraising will have an impact.
3. **Strengths and opportunities** for strategic fundraising.
4. **Organizational culture** and team dynamics, and how these will play a role in fundraising strategies at the library.

This unique online assessment (designed by the Fast Forward Libraries team and reviewed and refined by the library director) will provide an overview of library strategic readiness, concerns, gaps, and opportunities to inform fundraising strategy.

Feasibility Study

At the end of this phase, our team will gather all learning information into a comprehensive **Feasibility Study**. Summaries and analysis of all of the input elements will provide a comprehensive analysis of library readiness, the community's ability to support a capital campaign, and infrastructure needs to facilitate a successful campaign. The study will provide the background necessary to discuss (in Phase II) and make strategic decisions (in Phase III) to support a capital campaign at the La Crosse Public Library.

Phase I Deliverables	<ul style="list-style-type: none">» Finalized planning process timeline.» Input elements: community survey, focus groups and interviews, Philanthropic Capacity Assessment, Library Strategic Capacity Assessment.» Feasibility Study that includes analysis and findings from information gathered and reviewed through the input elements.» Regular check-ins with library director.
Timeframe	December 2025 – April 2026

Phase II: Dream

Here we will strategize with library leaders using the results of the Feasibility Study as our guide.

Review Meeting

Amanda will meet with the library director (and select leaders, if necessary) to review the Feasibility Study and plan for the Leadership Workshop.

Leadership Workshop

Amanda will facilitate a three-hour workshop with library leaders to review the Feasibility Study and discuss various fundraising approaches, staff capacity, and possible timelines. The workshop will allow for various modes of engagement and will look holistically at fundraising at the library — how it would impact library services, organizational structure, and the community. Following the workshop, the consulting team will review notes and themes to help inform the Recommendations and Fundraising Strategy Report in Phase III.

Phase II Deliverables	<ul style="list-style-type: none">» Leadership Workshop.» Regular check-ins with library director.
Timeframe	May 2026



Phase III: Do

Here we will weigh recommendations and fundraising strategies to settle on a clear capital campaign roadmap.

Recommendations and Fundraising Strategy Report

The consulting team will consult all of the data from the Feasibility Report and the themes and outcomes from the Leadership Workshop — and leverage their fundraising, library, and strategic planning expertise — to generate a **Recommendations and Fundraising Strategy Report draft** that will provide detailed fundraising strategies and ideal timeline to maximize the libraries development opportunities. Consideration will be given to library operations, organizational structure, the community's capacity to fiscally support a campaign of this size, and local fundraising organizations' recommendations.

Study Presentation

Amanda will meet with the Library Board and library leadership to present study findings and highlights of the recommendations report. Following the meeting, the consulting team will make adjustments based on feedback from the Board and library leadership regarding the recommendations report.

Implementation Guide

Once the final format of the **Recommendations and Fundraising Strategy Report** is complete. The consulting team will generate an Implementation Guide with an activity plan, evaluation framework, and reporting timeline — essentially a roadmap for putting the fundraising strategy into action. Amanda will meet with the library's leadership to review and refine the Implementation Guide.

Phase III Deliverables	» Recommendations and Fundraising Strategy Report. » Study Presentation. » Implementation Guide. » Regular check-ins with library director.
Timeframe	June – July 2026

Deliverables

Deliverable	Description
Feasibility Study	Comprehensive report of all qualitative and quantitative data gathered during the initial phase of the process. The Feasibility Study provides analysis and findings that help the consulting team and library leaders build a workable fundraising strategy.
Recommendations and Fundraising Strategy Report	Elaborates on themes and results from the Leadership Workshop and provides various recommendations and strategies for the library to execute a capital campaign.
Implementation Guide	The Implementation Guide includes an activity plan, evaluation framework, and reporting timeline to ensure the fundraising strategy is

Budget and Timeline

Phase I: LEARN			
What	Who	When	Cost
Project Kick-Off Meeting With the library director and other select leaders (if necessary), the FFL team will review the process and timeline, discuss information gathering needs, and community survey design.	FFL Team, Library Director	December 2025 - 2 hours: preparation - 1.5-hour meeting (via Zoom) - 1 hour: follow-up	\$500
Community Survey Development and Administration Develop survey instrument and refine with Library Director. Administer and monitor survey with library staff assistance with link distribution. <i>*Print version of the survey available for distribution.</i> <i>**Library staff enter print survey responses.</i> <i>***Mailed survey not recommended. Mailing cost not included.</i>	Amanda, Laura	January – February 2026 - 10 hours: survey development - 5 hours: survey administration/monitoring - 10 hours: analysis and reporting - Email/phone meeting(s) as needed	\$2,500
Focus Groups and Interviews Facilitation of focus groups and interviews to learn more about fundraising capacity from donors, library leaders, stakeholders, and local fundraising groups. Library leaders will assist in inviting participants.	Cindy	February 2026 - 2-hours: meeting with library director (via Zoom) - 4 hours: registration and preparation - Up to 2, one-hour focus groups (in-person or via Zoom) - Up to 10 interviews, up to 30 minutes each (in-person, via Zoom, or phone) - 8 hours: notes, reporting - 2 days on-site	\$3,500
Library Strategic Capacity Assessment Refine survey instrument with library director for Trustees and Staff to complete. Create report to identify strengths, gaps, and opportunities.	Kirstin	February 2026 - 10 hours: preparation (assessment and orientation video) - 5 hours: survey administration/monitoring - 10 hours: reporting	\$2,500
Philanthropic Capacity Assessment We will gather data to inform the feasibility study that includes: <ul style="list-style-type: none"> • Community demographic profile. • Fundraising data. • Library operations data. • Benchmarking report. • Library capital campaign sector scan. 	Laura	March 2026 - 35 hours	\$3,500



Phase I: LEARN (continued)			
What	Who	When	Cost
Feasibility Study Development Develop report that analyzes and synthesizes all information gathered. Deliverable: Feasibility Study	Amanda, Laura, and Kirstin	April 2026 - 40 hours	\$4,000
Phase I Total (inclusive of supplies)			\$16,500

Phase II: DREAM			
What	Who	When	Cost
Review Meeting Review Learning Report and prepare for Leadership Workshop with Library Director.	Amanda	May 2026 - 1 hour: preparation - 1-hour meeting (via Zoom) - 1 hour: follow-up	\$300
Leadership Workshop Three-hour, in-person session with library leaders to review learning and workshop fundraising strategies.	Amanda	May 2026 - 4 hours: preparation - 3-hour workshop - 2 hours: follow-up - 1 day on-site	\$3,500
Phase II Total (inclusive of supplies, see Travel Note)			\$3,800



Phase III: DO			
What	Who	When	Cost
Recommendation and Strategy Development Develop recommendations and strategy for review by library leaders and Board. Deliverable: Draft report.	FFL Team	June 2026 - 25 hours	\$2,500
Study Presentation Meeting with Board to review all plan documents and make final revisions. Deliverable: Final Recommendations and Fundraising Strategy Report.	Amanda	July 2026 - 2 hours: preparation - 1-hour meeting with Board (via Zoom) - 2 hours: follow-up	\$500
Implementation Guide Develop draft documents for review by library leaders to launch implementation. Deliverable: Implementation Guide.	FFL Team	July 2026 - 15 hours: document development	\$1,500
Implementation Plan Meeting Meeting with library leaders to review and refine Implementation Guide to assist in operationalizing fundraising strategy.	Amanda	July 2026 - 2 hours: preparation - 1-hour meeting (via Zoom) - 2 hours: follow-up	\$500
Phase III Total (inclusive of supplies)			\$5,000

Project TOTAL (inclusive of supplies, see Travel Note)	\$25,300
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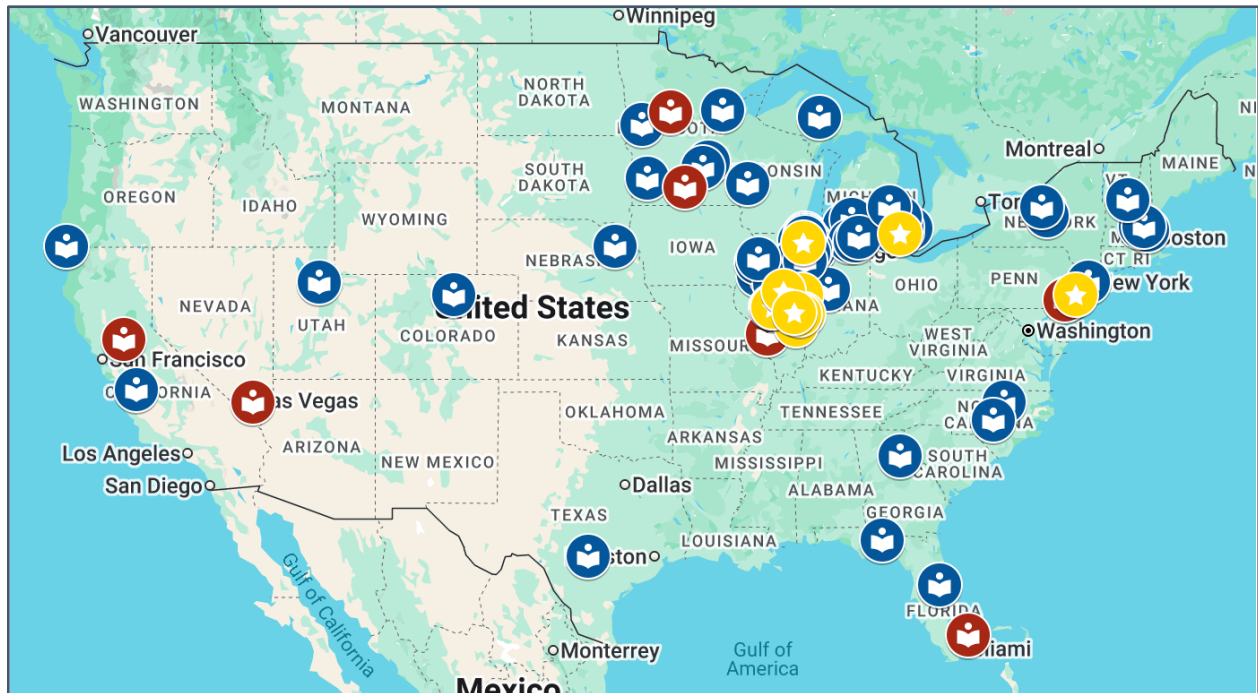
Travel Note

This proposal includes one trip to the library (for Amanda to facilitate the Leadership Workshop — Cindy is local). We anticipate that each trip to the library will be approximately \$1,500 for airfare, mileage, hotel, and meals, reimbursed at cost with receipts provided — total travel will not exceed \$1,500.



Client List

We're proud to have worked with libraries, nonprofits, and library-support organizations all over the country. You can explore our client map [online](https://fastforwardlibraries.com/about/#client-map) (<https://fastforwardlibraries.com/about/#client-map>).



Fast Forward Libraries

Library Strategic Planning

- Allegan District Library (MI)
- Antioch Public Library District (IL)
- Athens Regional Library System (GA)
- Auburn Hills Public Library (MI)
- Batavia Public Library (IL)
- Bayport Public Library (MN)
- Bellwood Public Library (IL)
- Bensenville Community Public Library (IL)
- Black River Falls Public Library (WI)
- Bloomfield Township Library (MI)
- Blue Island Public Library (IL)
- Brimfield Public Library District (IL)
- Carlock Public Library District (IL)
- Carmel Clay Public Library (IN)
- Cary Area Public Library District (IL)
- Chillicothe Public Library District (IL)
- Cheltenham Township Library System (PA)
- Chesterfield Township Library (MI)
- Clarkston Independence District Library (MI)
- Commerce Township Community Library (MI)
- Concord Free Public Library (MA)
- Crete Public Library District (IL)
- Crystal Lake Public Library (IL)
- Des Plaines Public Library (IL) – department-level
- Dickinson County Library (NC)
- Duluth Public Library (MN)
- Dunlap Public Library District (IL)
- Elk Grove Village Public Library (IL)
- El Paso District Library (IL)
- Farmington Community Library (MI)
- Fondulac District Library (IL)
- Fossil Ridge Public Library District (IL)
- Fountaindale Public Library District (IL)
- Franklin County Library System (NC)
- Franklin Public Library (MI)
- Galesburg Public Library (IL)
- Glenview Public Library (IL)
- Green Hills Public Library District (IL)
- Harnett County Library System (NC)
- Helen Plum Library (Lombard, IL)
- Highland Park Public Library (IL)
- Hollis Social Library (NH)
- Holly Township Public Library (MI)
- Howell Carnegie District Library (MI)
- Indian Prairie District Public Library (IL)
- Indian Trails Public Library District (IL)
- Iosco-Arenac District Library (MI)
- Kewanee Public Library (IL)
- La Grange Public Library (IL)
- Lake Villa District Library (IL)
- Lapeer District Library (MI)
- Lincoln Library (IL)
- Liverpool Public Library (NY)
- Lyons Regional District Library (CO)
- Milford Public Library (MI)
- Morton Public Library District (IL)
- Nashua Public Library (NH)
- Niles-Maine District Library (IL)
- Norfolk Public Library (NE)
- Northbrook Public Library (IL)
- Orange County Library System (FL)
- Orion Township Public Library (MI)
- Oswego Public Library (MI)
- Otsego District Public Library (MI)
- Palatine Public Library District (IL)
- Patrick Heath Public Library (TX)
- Paw Paw District Library (MI)
- Peoria Public Library (IL)
- Peter White Public Library (MI)
- Plainfield Public Library District (IL)
- Pollard Memorial Library (MA)
- Polk County Public Libraries (NC)
- Portage District Library (MI)
- Prospect Heights Public Library District (IL)
- Public Libraries of Saginaw (MI)
- Reddick Public Library District (IL)
- Resource Sharing Alliance NFP (IL)
- Richland Community Library (MI)
- River Forest Public Library (IL)
- River Valley Public Library District (IL)
- Round Lake Area Public Library District (IL)
- Royal Oak Public Library (MI)
- Schaumburg Township District Library (IL)
- Spring Lake District Library (MI)
- Talcott Free Library District (IL)
- Three Rivers Public Library District (IL)



Library Strategic Planning (continued)	
<ul style="list-style-type: none"> • Tippecanoe County Public Library (IN) • The Urbana Free Library (IL) 	<ul style="list-style-type: none"> • Westfield Washington Public Library (IN) • Yorktown Public Library (IL)
LSTA 5-year Evaluation Projects	
<ul style="list-style-type: none"> • Idaho Commission for Libraries (2021) 	
Library Organizational Capacity Building	
<ul style="list-style-type: none"> • Addison Public Library (IL) – culture code • Broadview Public Library District (IL) – community survey • Elmhurst College (IL) – staff retreat • Glenview Public Library (IL) – strategic capacity assessment • Grayslake Area Public Library District (IL) – unified service desk reorganization • Grayslake Area Public Library District Foundation (IL) – capacity building 	<ul style="list-style-type: none"> • Helen Plum Library (Lombard, IL) – culture code • Indian Prairie Public Library (IL) – Board and Staff retreat facilitation • Indian Trails Public Library District Foundation (IL) – fundraising planning • Lillie M. Evans Public Library District (IL) – focus groups • Mahomet Public Library (IL) – fundraising planning • Palatine Public Library District (IL) – culture code
Library Training, Workshop, Webinar, or Coaching	
<ul style="list-style-type: none"> • Alaska State Library DirLead – director’s retreat • Bloomington Public Library (IL) – fundraising capacity building • Chicago Public Library (IL) – facilitation training • Fast Forward Library Leadership Cohort – leadership development program • Herrick District Library (MI) – facilitation training • Illinois Heartland Library System – webinars • Illinois Library Association – Trustee Day programs 	<ul style="list-style-type: none"> • InfoPeople – webinars • LACONI consortium in Northern IL – strategic planning workshop • Next Level Library Leadership Institute (FL) – coaching • Northeast Ohio Regional Library System – leadership workshops • Reaching Across Illinois Library System – webinars • United for Libraries – webinars
Nonprofits (strategic planning facilitation unless otherwise noted)	
<ul style="list-style-type: none"> • Champaign County Design and Conservation Foundation (IL) • Coles County Habitat for Humanity (Charleston, IL) – Board retreat • Coles County United Way (Mattoon, IL) – Board reorganization and strategic planning • Effingham County Museum (IL) • Family Service of Lake County (IL) • Fit-2-Serve (Mattoon, IL) • Galesburg Public Library Foundation (IL) • Illinois Environmental Council / Education Fund 	<ul style="list-style-type: none"> • Illinois Stewardship Alliance (Springfield, IL) • The James Project (Springfield, IL) • Kidzeum (Springfield, IL) • Lincoln Memorial Garden (Springfield, IL) • Mid Illinois Big Brothers Big Sisters (Effingham, IL division) • Springfield Area Arts Council (IL) • Springfield Art Association (IL) • Sugar Grove Nature Center (IL) • Sullivan Chamber and Economic Development (IL) – Board retreat and strategic planning



Amanda E. Standerfer



(217) 821-2880

amanda@standerferconsulting.com

fastforwardlibraries.com

Summary

- Strategic thinker skilled in organizational capacity building, evaluation, and project management.
- Impact-focused community developer. Proven nonprofit advocate and fundraiser.
- Goal-oriented, collaborative leader with strong meeting facilitation, teaching, and training experience.
- Track record of successful budget management, team development, and relationship/network building.

Professional Experience

Fast Forward Libraries / Alliance for Library Impact / Standerfer Consulting

Champaign, IL

Independent Consultant

January 2002 to Present

- Results-driven consulting services for libraries, library-support organizations, and nonprofits in the areas of strategic planning, fundraising, systems change, organizational development, and evaluation.
- Help clients develop solutions for increased efficiencies and data/program tracking.
- Facilitate engaging, inspiring sessions to achieve client goals.

The Urbana Free Library

Urbana, IL

Director of Development & Promotion

October 2018 to May 2021

Director of Community Engagement

May 2021 to November 2022

- Increase community engagement by coordinating social media, marketing, and user experience.
- Work with Foundation Board to increase capacity and donor development, including implementing a donor management solution.
- Coordinate all fundraising and grants.
- Engage staff in culture development activities to increase job satisfaction.

The Lumpkin Family Foundation

Mattoon, IL

Program Officer

July 2013 to October 2018

- Improved the holistic health of communities in east central Illinois through proactive and responsive grantmaking programs (approx. \$1m annually).
- Built strong grantee/partner relationships and networks by facilitating convening and training for increased organizational and sector capacities.
- Led strategic planning teams to design member-informed programs leading to community impact.
- Increased organizational effectiveness through comprehensive evaluation and learning program.
- Attained high satisfaction of members/donors through engagement programs.

Decatur Public Library

Decatur, IL

Head of the Adult Division

May 2011 to June 2013

- Ensured high-quality programs and services to adult patrons, including reference desk operations, bibliographic instruction, technology training, collection development, educational programming, and public access Internet.
- Developed and implemented training and teambuilding programs for staff of 8 FTE.
- Led focused planning process resulting in internal and external communications that increased program attendance and service utilization.
- Added value to library's management team by sharing ideas and learning that led to increased collaboration within the organization.

Sarah Bush Lincoln Health System**Mattoon, IL**

Performance Consultant
January 2011 to May 2011

- Developed and delivered department-specific responsive training to will increase service delivery quality and patient satisfaction scores.
- Facilitated process improvement sessions using service mapping and recommended improvements/changes in procedures.
- Developed and delivered organization-wide training that increased employee engagement and effectiveness.
- Facilitate new employee orientation to increase understanding of organization mission, vision, and culture.

Southeastern Illinois Community Foundation**Mattoon/Effingham, IL**

Program Director
November 2008-January 2011

- Increased organizational and program capacity of nonprofits in southeastern Illinois through annual competitive and strategic grant programs providing over \$50,000 in funding per year.
- Developed and implemented annual fundraising plans.
- Key player in development and marketing of regional nonprofit network www.goodWORKSconnect.org (now part of Forefront).
- Enriched operations and fundraising capacity of nonprofits in the region by providing consulting and training.

Effingham Public Library**Effingham, IL**

(Formerly Helen Matthes Library)
Library Director
June 2001 to January 2009

- Facilitated and managed strategic plans that met or exceeded all goals, including 40% increase in circulation, triple interlibrary loan usage, and double patron computer sessions.
- Planned and delivered 100% increase in budget between 2002 and 2008, including implementing fundraising program and a successful tax referendum campaign in February 2008.
- Developed and implemented Board and staff training programs, core competencies, and assessments that resulted in increased participation and higher patron satisfaction ratings.
- Implemented cutting-edge technology to deepen customer experience.
- Designed and implemented patron technology training program that averaged 80 participants per month.

Rolling Prairie Library System**Decatur, IL**

(Now [Illinois Heartland Library System](#))
Library Consultant
November 1999 to June 2001

- Facilitated systems improvement and capacity building for multi-type library members.
- Assisted libraries with organizational improvement through group and one-on-one trainings.
- Enhanced continuing education programs by coordinating quality speakers on a wide variety of topics.
- Implemented day-long seminar to maximize educational opportunities while minimizing staff time away from libraries.

Education**School of Information Sciences**

University of Illinois at Urbana-Champaign

Courses towards
Certificate of Advanced Study

January – December 2010

School of Information Sciences

University of Illinois at Urbana-Champaign

MS in Library and Information
Science

August 1999

Graduate College

Eastern Illinois University, Charleston, Illinois

MA in History

August 1997

Eastern Illinois University, Charleston, Illinois

BA in History

December 1995
Cum laude

CINDY FESEMYER

Madison, WI · 608-443-6362 · FesemyerConsulting@gmail.com

Passionate, collaborative library leader with a knack for big picture thinking and making connections.

LIBRARY EXPERIENCE

FESEMYER CONSULTING LLC—2021-PRESENT

PRINCIPAL

Independent consultant specializing in strategic planning, often in partnership with Fast Forward Libraries or Library Strategies; also offering library staff and Trustee training, leadership development, and speaking engagements.

UNIVERSITY OF WISCONSIN-MADISON—2010-PRESENT

CONTINUING EDUCATION INSTRUCTOR & CONFERENCE PLANNING

Develop and teach Basic Public Library Administration, 2022-present; community engagement and strategic planning courses, 2015-19; co-plan Lead the Way: Community Engagement Conference and Symposium 2018-2020.

ASSOCIATE LECTURER

Teach LIS 620: Field Study 2023 and LIS654: Management 2022. Develop and teach LIS855: Community Partnerships (2016-2018)

PROJECT ASSISTANT

Research financial literacy efforts in WI, 2010-2011

WI DEPARTMENT OF PUBLIC INSTRUCTION—2019-2021

ADULT AND COMMUNITY SERVICES CONSULTANT

Created and administering 36 person, state-wide, 18-month community engagement cohort; Enterprise Management Development Academy Fellow; coordinate professional development activities for WI library staff; plan and orchestrate LSTA-funded programs and services; statewide outreach activities.

COLUMBUS PUBLIC LIBRARY, WI—2012-2019

LIBRARY DIRECTOR

Awarded Runner up for *Library Journal* Best Small Library in America 2017; awarded IMLS National Leadership grant 2018; 2017 PLA Leadership Fellow; WI Public Library System Redesign (PLSR) facilitator; awarded ALA Libraries Transforming Communities grant; PLA and ALA conference and webinar presenter; South Central Library System Foundation President and Administrative Council representative; Level 1 Director Certificate.

MADISON PUBLIC LIBRARY, WI—2010-2024

BOARD OF TRUSTEES

Treasurer/Secretary, 2019-2021 and 2023, Vice President, 2022, at-large member 2016-2024

PAGE II, PINNEY BRANCH

Circulation desk, 2011

FRIENDS OF THE HAWTHORNE LIBRARY BRANCH

Community member, 2010-12

AMERICAN LIBRARY ASSOCIATION—2013-PRESENT

AMERICAN LIBRARY ASSOCIATION

Frequent conference and webinar presenter, 2016-present

Public Programming Office

- Libraries Transforming Communities Advisor, 2016-2022
- 21st Century Libraries Advisor for library programming competencies based on National Impact of Library Programs Assessment white paper, 2020-2022
- Libraries Transforming Communities program participant, 2013-15

PUBLIC LIBRARY ASSOCIATION

Leadership Committee, 2023-present

Finance Committee, 2021-2023

Board member, small/rural seat, 2019-2021

Leadership Academy Fellow

EDUCATION

UNIVERSITY OF WISCONSIN-MADISON

MLS 2012, BA ENGLISH 1990

HUMBOLDT STATE UNIVERSITY, CA

MA LITERATURE & MA TEACHING WRITING 1993

PUBLICATIONS

FORTHCOMING PUBLICATIONS

Small Public Library Management, 2nd Edition. Fesemyer, Cindy. Chicago, IL: ALA Publishing, Inc. (expected 2026)

Career Options in Library and Information Services: First-hand Accounts from Working Professionals. Edited by Priscilla K Shontz. (Chapter contributor, expected 2025)

CHAPTER CONTRIBUTIONS

Ch 4 *Partnering for Great Impact* and Ch 5 *Respect and Compromise Aid School-City Partnership* in M. Davis-Fournier (Ed.) *Ask Listen Empower: Grounding Your Library Work in Community Engagement*. Chicago, IL: ALA Publishing, Inc. (2021)

Food for Thought: Feeding Mind & Bodies at Public Libraries in C. Smallwood (Ed.) *Social Justice and Activism in Libraries: Moving Beyond Diversity to Action*. Jefferson, NC: McFarland & Company, Inc. (2019)

LAURA HUDDLESTON MLIS

217-246-1134

laurahud04@gmail.com

PROFILE SUMMARY

Seasoned library professional with over fifteen years of experience in public libraries and philanthropy. Areas of expertise include grant writing, collection development, and programming. Experience in strategic planning, community outreach, and evaluation for libraries.

WORK EXPERIENCE

Associate Consultant – Fast Forward Libraries 2022–Present

- Design and implement community and library-specific evaluation instruments
- Facilitate community focus groups and interviews
- Analyze data to compose learning reports and strategic plan documents
- Conduct research and design and present learning in a variety of formats

Contractual Consultant – Fast Forward Libraries 2019–2022

**Program Officer for Community Engagement and Organizational Learning
– Lumpkin Family Foundation** 2016–2022

- Designed and conducted evaluation of member and grantseeker programs
- Conducted in-depth community environmental scan to ascertain local grant program needs
- Designed and piloted Staff and Board learning including a facilitator-led EDI learning process and in-house modules on team values, organizational culture, and trust-based philanthropy

Program Associate – Lumpkin Family Foundation

- Managed all grant applications, reports, and payments of over \$3 million annually
- Created communication materials including evaluation reports, newsletters, and web content
- Hired, supervised, and mentored interns and program assistants

Children's Department Head – Mattoon Public Library 2005–2015

- Managed all facets of the children's department including collections, programming, and outreach
- Earned state and local grants for mobile library outreach and early literacy programming
- Pioneered *First Grade! First Card!* and Book Buggy programs
- Designed and led programming for all ages of youth including neurodivergent audiences

Software Quality Assurance & Installation Supervisor – Pearson Education Technologies 2000–2004

Spanish Teacher – Champaign, IL Unit 4 Schools 1999–2000

EDUCATION

MS in Library and Information Science

2020

Indiana University

BA in Spanish and Secondary Education

1999

Eastern Illinois University, Summa Cum Laude

HONORS AND ACHIEVEMENTS

- Journal-Gazette 20 Under 40 Award Winner, 2014
- ISLMA Monarch Award Committee – 2011 to 2013
- BabyTALK trained early literacy professional

VOLUNTEER EXPERIENCE

- Mattoon Public Library Trustee, 2021 to Present
- Fit-2-Serve Volunteer, 2016 to 2020
- Mattoon Artworks Committee, 2016 to 2017
- One Stop Community Christmas Volunteer, 2013 to 2015
- Coles County RSVP Advisory Board, 2006 to 2008

REFERENCES AVAILABLE UPON REQUEST

Kirstin Gebhart

(502) 475-1306
kirstin.gebhart@gmail.com
linkedin.com/in/kirstin-gebhart/

EDUCATION

Bachelor of Arts in Art History

American University, Washington, DC

Graduated May 2011

Magna cum laude

Art History Department's Outstanding Graduating Senior, 2011

Master of Arts in History

SUNY Brockport, Brockport, NY

Graduated May 2024

Phi Alpha Theta, 2024

Thesis: Muddying the Waters: Paradigm Shifts in River Control on the Lower Mississippi River

WORK EXPERIENCE

Assistant Consultant

Fast Forward Libraries, Champaign, IL

July 2024 - present

- Write reports summarizing data collected from a variety of sources in support of strategic planning projects
- Assist in the development of strategic plans for libraries across the country
- Assist in the development of proposals for potential projects

Communications and Development Manager

The Urbana Free Library, Urbana, IL

September 2022 - December 2023

- Directed the Community Engagement department and oversaw all library communications projects
- Oversaw the operation of The Urbana Free Library Foundation
- Oversaw all library and Foundation communications
- Completed a thorough review of the library's communications policies and procedures
- Created new Community Engagement procedures, job descriptions, and staff evaluations

Senior Director of Communications and Member Services

National Field Hockey Coaches Association, Remote

July 2018 - September 2022

- Oversaw all association communications
- Managed all digital platforms including association website and social media profiles
- Developed and led the Fuel Our Future campaign, the association's first fundraising initiative
- Developed and maintained branding and communications guidelines
- Developed and maintained NFHCA resources, such as a digital drill booklet, annual reports, prospectuses, salary survey results, and two weekly email newsletters
- Created branded digital and physical content to support programming and association initiatives
- Served as staff liaison to member-led committees
- Assisted in the planning and implementation of NFHCA events
- Managed NFHCA Awards and Administrative Coordinator
- Assisted in the implementation of the NFHCA National Coaches Polls for all three NCAA divisions and all awards programming

Kirstin Gebhart

Engagement Communications Specialist

Penn State University, State College, PA

August 2017 - July 2018

- Wrote and edited annual fundraising appeals for units across the university
- Wrote presidential stewardship letters to major donors
- Served as editor of the Division of Development and Alumni Relations' intranet site, LaunchPad3
- Collaborated with the Office of Annual Giving to develop engagement and communications strategies to reach new and existing audiences across a multitude of platforms, following a donor-centric model
- Created content to support ongoing engagement efforts on social media, in print, through email, and online
- Contributed to the engagement team's efforts to develop a new digital strategy for the Office of Development Communications

First Assistant Coach

American University, Washington, DC

July 2014 - January 2017

- 2016 Patriot League Champions, competed in NCAA Tournament Round of 16
- Top GPA among NCAA Division I Field Hockey programs with team average 3.65 in 2015
- Led the day-to-day office operations of Division I, NCAA field hockey program
- Managed social media platforms and designed promotional graphics
- Coordinated domestic and international recruiting
- Organized and coordinated alumnae events and game promotions
- Assisted in team training, focusing on defense and goalkeeping, developed player specialist and fundamental skills
- Served on the National Field Hockey Coaches Association's Senior Game Committee in 2015 and 2016

Assistant Coach

University of Louisville, Louisville, KY

June 2012 - July 2014

- Assisted in the day-to-day operations of a top-twenty, Division I, NCAA field hockey program
- Coordinated domestic recruiting
- Led fundraising and alumnae engagement efforts
- Assisted in team training, focusing on defense and goalkeeping, developed player specialist and fundamental skills
- Compiled regular and special compliance reports
- Coordinated community service efforts

PROJECTS & VOLUNTEERING

Assistant Field Hockey Coach

SUNY Geneseo

Host

Pitch Session

A field hockey podcast.

Volunteer

Parkrun Morrissey Park

Champaign, IL

2023-2025

Vice Chair, Board Member

Brockport Museum and Library of Local History

Brockport, NY

2019-2022

Assistant Field Hockey Coach

SUNY Brockport

2021-2022

Volunteer Field Hockey Coach

Penn State University

2017-2018

SKILLS

Social Media Management

Twitter, Facebook, Instagram

Email Marketing Software

MailChimp, Constant Contact

Professional Office Software

Microsoft Word, Microsoft Excel, Microsoft

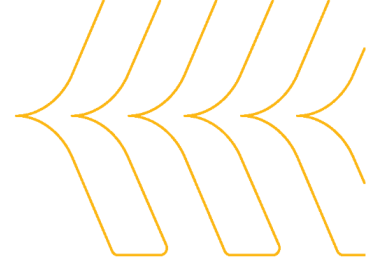
Powerpoint, Apple Keynote, Apple iMovie

Website Management

Wordpress, Drupal

Design Software

Adobe Photoshop, Adobe InDesign, Canva



November 17, 2025

Dawn Wacek
Library Director
La Crosse Public Library
800 Main Street
La Crosse, WI 54601

Dear Dawn:

Thank you for the opportunity to share Kinetic's qualifications to conduct a Feasibility Study on behalf of La Crosse Public Library. Kinetic would be proud to partner with you as you prepare to launch a campaign to support the youth services expansion initiative as detailed in phase 2 of your space audit. Your vision for creating dynamic, accessible spaces for children and teens is one that will benefit your community for years to come.

As discussed, our team's approach to feasibility studies is grounded in data-driven analysis and community engagement. Our Feasibility Study process includes:

- Campaign Readiness Review to assess your internal readiness
- Case Statement Development
- Prospect Research through Wealth Screening and Charitable Foundation Research
- Campaign Assessment Interviews and Surveys to gauge philanthropic capacity and enthusiasm for the project
- Final Report Preparation and Presentation that includes clear, actionable recommendations

The findings of our Feasibility Study will provide strong insight into your constituents' perceptions of the Library's renovation and expansion campaign. The Study will begin the process of identifying and cultivating relationships with potential donors and volunteer leaders, while also determining the level of support you may expect for the campaign.

Kinetic is a global fundraising company with a 38-year history of unleashing our clients' power of philanthropy. Our team is dedicated to providing quality support and committed to helping you achieve the Library's objectives using the highest standards of professionalism. This combination of project success and ethical excellence is a hallmark of our company.



Dawn Wacek
November 17, 2025
Page 2

In addition, our team brings direct and relevant local experience. I (Janell) was raised in the La Crosse area and am currently working on The Salvation Army's capital campaign in the community. This connection gives our team a strong understanding of the philanthropic landscape, key stakeholders and regional giving patterns. We believe this familiarity will support a thoughtful and effective approach to your Feasibility Study.

Kinetic appreciates the opportunity to submit the proposal that follows. It would be an honor to help you achieve the philanthropic goals that will lay the groundwork for the next chapter of this vital community resource.

Sincerely,

Janell Johnson, MPA
Chief Growth Officer

Aaron Johnson
Senior Vice President

A Feasibility Study Proposal

Prepared for

La Crosse Public Library

November 17, 2025



PO Box 410046 | Kansas City MO 64141
866.630.8500 | info@kineticfundraising.com

kineticfundraising.com

● **Proposal**

The following proposal is prepared specifically for La Crosse Public Library (LPL). It is designed to demonstrate Kinetic's qualifications to conduct a comprehensive Feasibility Study to assess donor capacity, campaign readiness and fundraising potential for LPL's proposed \$7-million library renovation project focusing on the children's and teen's service areas.

● **Response to Proposal Requirements**

In the following detailed proposal, Kinetic includes the requirements outlined in LPL's Request for Proposals dated October 15, 2025. We hope the information included provides confidence to LPL's leadership that Kinetic is the ideal partner to help refine the concepts included in the architectural firm's conceptual plan, help the library determine attainable fundraising efforts to align with cost projections and present a clear, actionable roadmap for the successful execution of Phase Two.

Contents:

- Firm Information
- History, Experience and Track Record
- Project Plan
- Schedule and Timeline
- Cost

● **Firm Information**

Kinetic Fundraising, Incorporated
P.O. Box 410046
Kansas City, MO 64141
kineticfundraising.com

Primary Contact

Terry Gibson, Chief Operating Officer
+1-866-630-8500 ext. 8685
tgibson@kineticfundraising.com

LPL/Kinetic Project Team

Our team of professionals consists of the world's leading expert fundraising consultants, a highly qualified, consumer-focused client services staff and the most innovative, brightest professionals in our Advisory and Corporate Boards of Directors. The following would be key members of the La Crosse Public Library/Kinetic Project Team. Each will dedicate whatever time necessary to ensure the project is completed thoroughly, accurately and successfully.



Janell Johnson, MPA
Chief Growth Officer

As a member of Kinetic's leadership team, Janell provides insightful and strategic direction to the company and its clients. She is well versed in capital campaign organization and execution; major gift identification; event planning; cultivation and solicitation strategies; annual fund development; planned gift acquisition; strategic planning and more.

In her more than 18 years with Kinetic, she has had considerable experience in board development, training fundraising leaders and providing staff management. Her impressive track record demonstrates that she routinely exceeds clients' expectations and breaks past their fundraising records. She holds a Master of Public Administration and Certification of Nonprofit Leadership Administration from Western Michigan University.



Bob Beard
Senior Vice President

Bob has more than 30 years of experience helping organizations grow their impact through strategic campaigns, donor engagement and innovative consulting. He has held executive and consulting roles with numerous nonprofits including Meals on Wheels Metro Tulsa, Child Advocacy Network and Tulsa Community College Foundation.

His entrepreneurial approach is reflected in projects like the official Hasbro *Oklahoma Centennial Monopoly* game, which he created and produced as a unique fundraising initiative celebrating Oklahoma's centennial. Bob holds a Master of Education in Public School Administration and a Bachelor of Science in Communications from Oral Roberts University.



Terry L. Gibson, MBA, CPA
Chief Operating Officer

Terry supports Kinetic clients through his oversight of daily company operations, finance and human resources. During his 20 years of professional experience, Terry has worked in both nonprofit and private enterprise accounting, fiscal policy implementation, strategic planning, and human resource management.

During his career, Terry has served on leadership teams, led accounting operations and ensured 501(c)(3) IRS compliance. Through his work in public accounting, he helped lead a nonprofit client services team. During his tenure in K-12 public education, Terry led the business, administrative and financial functions of two large school districts. Terry earned a Bachelor of Arts in Business Administration and Management at Baker University and a Master of Business Administration in Finance at the University of Missouri-Kansas City. He is a Certified Public Accountant.



Tammy Weinman
Chief of Staff

With more than two decades of experience at Kinetic, Tammy is a vital member of the leadership team with deep institutional knowledge. She provides strategic coordination and operational support across the company—including executive support for the CEO and COO—and leads Kinetic’s Support Services team to ensure every project runs smoothly and efficiently so clients can focus on

what matters most: advancing their missions.

Her commitment to service, strategic thinking and collaborative spirit play a central role in shaping a client-focused culture of excellence. She serves as a key liaison between leadership, consultants and clients—streamlining communication, reinforcing accountability and ensuring every interaction reflects Kinetic’s high standards of service. Tammy is a graduate of Wichita State University with a Bachelor of Business Administration in Management and a minor in Entrepreneurship. Tammy currently serves on the board of the Association of Fundraising Professionals (AFP) Heartland Chapter and previously spent eight years as committee chair for Scouting America Pack and Troop 692.



Melanie Louis

Senior Vice President of Corporate, Market and Foundation Research

Melanie has brokered millions in funding for organizations by leveraging her strong communication skills and expertise in research, grant writing and development. She was the lead writer of New York Green Bank's \$30-million potential for investment in clean energy and a consultant to the Harlem Globetrotters, where she led Learning and Development for schools, developed an international community outreach learning model (T.E.A.M. Up) and the board's first Program Quality Improvement report.

As the Education Director for The Reach Institute, Melanie led Mayo Clinic's global healthcare program on treatment for pediatric depression and anxiety. She was also the Director of Communications for The Makom School in New York City, where she improved feedback participation by 40% and procured the largest appreciation giving to-date.

Melanie lives in New York City and has a Master of International Social Work with a focus in Client-Centered Management from Fordham University and a Bachelor of Science from Penn State University.



Denise Rhoades

Vice President of Communications

Denise is Kinetic's professional writer with over two decades of experience developing case statements and campaign success stories for Kinetic clients from virtually every nonprofit sector in the United States and overseas. Utilizing a powerful combination of intuition and accuracy, Denise is adept at creating a concise and compelling case for support tailored to each client. She is also a co-author of the book *Bootstraps and Benefits* which highlights how nonprofits can best address issues of poverty. She received her Bachelor of Art in English from Stetson University in DeLand, Florida.



Lorri Adams
Client Services Coordinator

Lorri has decades of experience raising hundreds of millions of dollars for nonprofit organizations. She has developed diversified philanthropic strategies to meet clients' needs and strengthen their relationships with donors. Prior to her work with Kinetic, Lorri was the CEO and President of Solutions 4 Fundraising. Lorri provides invaluable insights as a key member of Kinetic's campaign assessment team. She is a graduate of Fort Hays State University with a Bachelor of Arts in Education.



Shannon Tran
Support Services Coordinator

Shannon provides project management and administrative support to key members of the Leadership Team. She serves as the primary liaison for clients and consultants, ensuring smooth communication and coordination and oversees the preparation of materials for speaking engagements and marketing initiatives.

With a background in editing, administrative assistance and customer service, Shannon brings a thoughtful, detail-oriented approach to every project. She has also held volunteer roles with her church and nonprofits such as La Leche League of Kansas, reflecting her commitment to community support and advocacy.



Lori Cox
Graphic Designer

During her more than 15-year history with Kinetic, graphic designer Lori Cox has designed numerous case statements, success stories and other collateral materials for Kinetic clients in the U.S. and abroad. Lori Cox is a professional designer whose artistic style and natural talent enhance the appearance and appeal of Kinetic clients' marketing and communications materials. Lori will be responsible for the design of the case for support. Lori has an expertise working with nonprofits and uses her design skills to create compelling material in support of each campaign. Lori has a Bachelor of Fine Arts (BFA) degree from Wichita State University.

Additional Team Members. To ensure LPL has the best support at every stage of the relationship, Kinetic will make available other members of the team as their unique talents and expertise are needed.

Brief History of Kinetic

Proven Success

In Kinetic's more than 38 years of service to nonprofits, we have provided counsel for thousands of projects on behalf of organizations whose work has changed lives for millions throughout the country and abroad. Since our inception, Kinetic consultants have helped clients raise billions of dollars in support of their missions and programs.

Your Power of Philanthropy

Kinetic is a catalyst for impactful fundraising. At the heart of what we do is helping our clients unleash their power of philanthropy. This occurs when donors, volunteers and nonprofit professionals work together to achieve goals they cannot reach on their own. We empower our partner organizations to build lasting connections that maximize the power of each donor, volunteer and professional with the understanding that:

- Donors want their philanthropy to impact causes personally important to them.
- Volunteers want their talent and relationships to advance causes important to them and that enable others to give meaningfully.
- Nonprofit professionals are optimally engaged when donors and volunteers are fulfilled and goals are met.

Knowledge and Expertise

Our clients benefit from Kinetic's dynamic team of experienced, dedicated and energetic development professionals who are prepared to explore and resolve the most pressing issues, challenges and questions. Equipped with the latest fundraising research, our consultants have a proven track record in major gifts fundraising and personal solicitation; bequest pledging and estate giving; prospect research; annual fund development; mentorship and volunteer recruiting and training; grant proposal writing; strategic planning; team building; creative problem solving and more. Their candid insight and extensive philanthropic knowledge often ignite a new energy within the nonprofits they serve.

Professionalism and Credibility

Kinetic's highly regarded reputation in the field of fundraising is the result of a longstanding commitment to professional excellence and uncompromising dedication to our clients' success. We are dedicated to using research and its application to increase philanthropy for our clients. Our consultants have established themselves as some of the most influential professionals within the field by initiating and completing successful campaigns; authoring published books, chapters in textbooks and articles in professional publications; and sharing their knowledge through speaking opportunities throughout the country and abroad.

Education and Learning

We dedicate significant resources to improve the practice of fundraising worldwide and advocate for the elevation of the standards, preparedness and education of development professionals and volunteer leaders.

- **The Lilly Family School of Philanthropy at Indiana University** is the world's first school dedicated solely to the study and teaching of philanthropy. IU established the field of philanthropic studies; established the nation's first bachelor's, master's, and doctoral degrees in the field; and collaborated with Kinetic and our founder to create the nation's first endowed chair in philanthropy.
- **The Institute of Sustainable Philanthropy, UK.** Kinetic's connection to the U.K. dates back to 1999, when Kinetic Chairman and CEO Matt Beem first met Dr. Adrian Sargeant, who went on to become the inaugural appointee as the nation's first endowed chair in philanthropy at Indiana University. Adrian co-founded The Institute for Sustainable Philanthropy, located in Plymouth, UK, which is the global home for fundraising research grounded in the science of philanthropic psychology. The Institute is dedicated to improving fundraising practices and the philanthropic experience. Kinetic's alliance with the Institute is an expression of our commitment to improving long term fundraiser education. Matt Beem was appointed as the Institute's first board chair.
- **Power of Philanthropy Days** demonstrate Kinetic's commitment to the communities we serve, and those in need of extraordinary attention during times of crisis. Partnering with leading community organizations, our Power of Philanthropy Days, held throughout the year, engage our extraordinary, top-level fundraising consultants with nonprofit organizations and the volunteers who support them. Registered nonprofits receive customized attention, strategies and follow-up so they are equipped with the knowledge and steps needed to help unleash their power of philanthropy.

Professional Partnerships

We partner with professionals to ensure our clients receive the most innovative solutions to their fundraising challenges. DonorSearch uses wealth analytics and proven philanthropy to help identify a carefully curated pool of prospective donors for each organization we support.

References

"Having worked with the Kinetic team for over 10 years, I have always found them to bring structure, discipline and accountability to our work. They provide an invaluable service in equipping our board and campaign cabinet with a deeper understanding of fundraising and major gifts philanthropy. With their support, we have consistently exceeded our goals. They are great partners in philanthropy."

--Matthew Naylor, PhD, President & CEO, National WWI Museum and Memorial

Kinetic recently completed a Feasibility Study for The Salvation Army of Wausau, and we anticipate transitioning into a Campaign Management relationship in the new year.

Members of our team also presented at the 2024 Wisconsin & Upper Michigan Divisional Development Conference for The Salvation Army.

While having knowledge specific to a particular geographic area or type of institution is important, we feel our firm's ability to adapt successful strategies to meet the needs and culture of each of our partner organizations is of equal importance. You will notice while reviewing the list of current and past clients that accompanies this proposal that Kinetic works in a variety of venues. Through knowledge gained by working with a diverse client base, we are able to provide you with uncommon insight and well-rounded counsel.

We encourage you to contact the following individuals for feedback about the level of satisfaction they experienced as clients of Kinetic.

Mr. Crosby Kemper, Former Director of the U.S. National Institute of Museum and Library Service and Previous Director of the Kansas City Public Library
Telephone: 816.679.3329 Email: crosbykemper@me.com

Major David Womack, Pastor/Corps Officer
The Salvation Army of Wausau – Wausau, WI
Telephone: (715) 845-4272 Email: David.Womack@usc.salvationarmy.org

Mr. Justin Marshall, Chief Development and Engagement Officer
Northwood University – Midland, MI
Telephone: 989.837.4279 Email: marshall@northwood.edu

As we do with all of our clients, we will strive to provide you with in-depth knowledge of philanthropy in LPL's giving community, while at the same time offering the significant and varied resources and expertise of a diverse national company. Our clients report that our consultative guidance gives them confidence that they can and will realize their development goals regardless of the size and scope of their projects. We are very proud of the fundraising achievements of every client we serve and attribute our success to great attention to detail, appropriate research, optimal donor, volunteer and staff engagement and an understanding of and focus on the mission and impact of each organization we serve.

● History, Experience and Track Record

As detailed in the prior section, the Kinetic team has extensive experience in planning and executing fundraising feasibility studies, conducting dozens from nonprofit organizations across the country, in the U.K. and Central America. We also have familiarity with the philanthropic and fundraising environment of La Crosse, Wisconsin. Most recently, Kinetic completed a Feasibility Study for The Salvation Army of Wausau, and we anticipate transitioning into a Campaign Management relationship in the new year.

Following are three examples of recent clients for whom we conducted a Feasibility Study which led to a successful campaign.

Northwood University (Midland, MI)

Kinetic completed a Feasibility Study for Northwood University in 2020 and quickly transitioned to providing counsel for the campaign. Northwood has exceeded every benchmark, and to date has raised more than \$76 million toward the \$100-million goal. Kinetic is currently working with the University to launch the public phase of the campaign.

KidsTLC (Olathe, KS)

engaged Kinetic to conduct a Feasibility Study in 2020, testing a \$15.5 million goal. Following the study, Kinetic provided campaign counsel for the four-year *Rooted in Hope* campaign to expand capacity, enhance programs and meet growing demand. The successful campaign enabled KidsTLC to acquire and renovate a building tailored to children in residential care, significantly expanding services and support for the families they serve ensuring no child will go without the critical care they need.

Children's Safety Center (Springdale, AR)

Children's Safety Center began working with Kinetic before launching its \$12.5 million campaign. From the Feasibility Study, board training, leadership recruitment, prospect identification and gift strategies, Kinetic has guided the staff and volunteers to exceed its campaign goal. CSC recently celebrated its grand opening.

Additional success stories can be found [here](#).

● Project Plan

Conducting a Feasibility Study builds a solid foundation for a successful campaign. This essential first step in the campaign process will evaluate the library's current readiness, assess the community's capital campaign potential, pave the way for a major gifts and

broad-based effort, begin the cultivation process with potential donors and volunteers, and recommend a detailed strategy and timeline to maximize fundraising opportunities. At the same time, it will begin the process of building and strengthening a robust donor base for future fundraising.

Kinetic's Feasibility Study is a comprehensive evaluation of your fundraising potential. It includes a Campaign Readiness Review, the development of a case statement, wealth screening, a Pre-Campaign Assessment, charitable foundation research and final report and presentation.

Conducting a Feasibility Study signals to your constituents LPL's commitment to the LPL's future. Experienced and sophisticated prospective donors understand organizations do not undertake the task of testing the financial viability of a campaign without that important commitment.

When embarking on a major gifts campaign, many organizations, and the groups that provide counsel on their behalf, focus almost exclusively on meeting the capital or endowment goals outlined in the campaign. While in a campaign, operational funds are also needed. Kinetic pioneered the Integrated Campaign™ philosophy more than 30 years ago, ensuring that all funding areas—including operations, staff and consultant costs, programs/renovation, furniture and equipment and capital and endowment or reserves—are addressed in a major gifts campaign. It is from this perspective that we will approach your project.

STEP 1: Campaign Readiness Review

The Campaign Readiness Review is a comprehensive study of LPL's internal readiness for a campaign. The process typically involves two days, separated by approximately six weeks, with the following objectives:

- Providing an overview of the Feasibility Study process.
- Reviewing LPL's financial data and fundraising history (grants, gifts, etc., if any).
- Reviewing LPL's fundraising and communication processes, systems and data.
- Reviewing the LPL's story and history in preparation for developing the test case statement.
- Discussing and reviewing the campaign goals to be tested.
- Selecting database segments to be included in the wealth screening.
- Identifying key words and focus areas to be used for charitable foundation research.
- Drafting the test case statement (see additional details below).
- Compiling the personal interview prospect list (80+ names).

- Compiling the survey prospect list (200 names).
- Developing questions and cover letters for the personal interviews and surveys.
- Developing a timeline and reviewing the process for:
 - Interview dates.
 - Mailing the cover letter and test case statement to potential interviewees and survey respondents.
 - Reviewing the call process to schedule interviews and mailing thank-you notes/letters to interviewees.
 - Study presentation date

The Campaign Readiness Review serves as the centerpiece for the Feasibility Study process and provides the necessary insight and information to gather data and make recommendations that will serve as a guideline for preparing LPL for the campaign.

STEP 2: Case Statement Development

Kinetic will collaborate with LPL on the development of a case statement to articulate LPL's value to prospective donors. This document will be designed to reflect LPL's culture, brand and style with up to two revisions. Our consultants, support team and experienced writers and designers will work with you to develop a compelling account of LPL to include the vision, mission, anecdotal elements; and program and staff support needs along with impactful photos and other graphic elements.

The case statement will present an accurate, comprehensive, compelling view of the LPL's vision and plans that clearly articulates the reasons LPL warrants support from donors. Specifically, the case statement should and will address:

1. *Why.* It is important that LPL thoroughly demonstrates the need for philanthropy and specifically, what will happen with significant support.
2. *Urgency.* Your case statement will not only articulate why philanthropy is needed, but why it is needed now.
3. *Impact.* Most importantly, the document will demonstrate LPL's importance and the impact it has on the community.

STEP 3: Kinetic Insight

Smarter strategy starts with deeper understanding. At Kinetic, we believe knowledge drives results. Kinetic Insight combines data science, donor intelligence and AI-powered tools to deliver a research-backed approach that sharpens your fundraising strategy and accelerates growth allowing you to move forward with clarity and confidence.

Kinetic Insight combines in-depth donor research, qualified prospect identification, AI-powered analytics and strategic data management to help you understand, engage and grow your donor base. We uncover who your donors are, what drives their giving, and where new opportunities lie, using both advanced technology and personal expertise. Our giving analysis and data strategies turn information into actionable insights, ensuring your campaigns target the right people, deliver the right message and generate stronger, lasting relationships that drive fundraising success.

- **Wealth screening** is a powerful tool that can help determine LPL's donors' capacities to give. Wealth screening utilizes publicly available resources and databases to gather top indicators of wealth such as real estate ownership, business affiliations, stock holdings in public companies and other analytics. Kinetic will conduct a wealth screening of up to 1,000 constituent records from your database or other source and return a file appended with wealth information, philanthropic indicators and other data. The information gathered through the screening process and campaign assessment interviews and surveys will help LPL identify major donor prospects, create realistic fundraising goals, plan direct asks, confirm matching gift eligibility and overall, more accurately forecast amounts you may expect from LPL's constituency.
- **Charitable Foundation Research.** Charitable foundation grant prospects will be considered along with other major gift prospects. Our grants specialists have extensive experience researching and identifying foundations and corporations that best match LPL's mission. Paying special attention to all relevant factors, our specialists will conduct targeted research to surface the best possible charitable foundation grant prospects.

STEP 4: Campaign Assessment Interviews and Surveys

Major hallmarks of a Kinetic Feasibility Study are its objectivity, specificity and accurate reflection of the perceptions of donors and prospects. Through the personal interview and survey processes, participants are encouraged to provide the most candid feedback possible, so we can identify their personal giving priorities, interests, motivations and views of the LPL and the proposed campaign. We will provide direct quotes from all respondents, keeping identity confidential to ensure participants' most candid feedback, so you will see the actual data along with our interpretation of what we heard. We will also seek interviewees' thoughts about prospective donors and campaign leaders.

In advance of the interviews and surveys, Kinetic will provide recommendations and help develop and refine questions specific to LPL's goals and objectives.

Personal Interviews

One of our tasks during the Campaign Readiness Review will be to work with you to identify 80 or more individuals who will form the core group of interview prospects. Typically, approximately 30 to 40 of those identified in the core group participate in interviews. These prospects will be invited into confidential discussions about the LPL through an orchestrated interview process. Practically, this means that we will seek to interview – in person, by online video conference or by telephone – a cross section of diverse individuals, business and philanthropic leaders, including those who may already have a relationship with the LPL. Because your organization has, or seeks to have, the relationships with these individuals, the scheduling of interviews will be conducted by a member of your team.

Survey

In order to ensure a broad perspective and surface potential interest in LPL's plans, we will also distribute an online survey to as many as 200 prospective supporters identified during the Campaign Readiness Review.

STEP 5: Feasibility Study Report Development and Presentation

Kinetic will compile and analyze the information gathered during the Feasibility Study and present detailed recommendations for fundraising in general and specific to the campaign.

We will provide an electronic copy in PDF format and one printed copy of the final report and will formally present it at the beginning of a meeting, such as a leadership retreat or special board or committee meeting.

● **Schedule and Timeline**

The entire study process, including the Campaign Readiness Review, case statement development, wealth screening, charitable foundation research, Campaign Assessment interviews, Campaign Assessment surveys and final report preparation typically takes approximately five months to complete. Following is a sample timeline.

Sample Timeline	Month 1	Month 2	Month 3	Month 4	Month 5
Campaign Readiness Review Day 1					
Case Statement Development					
Campaign Readiness Review Day 2					
Kinetic Insight: Wealth Screening/Foundation Research					
Campaign Assessment Interviews and Surveys					
Final Report Preparation					
Final Report Presentation					

Deliverables

The final report will include the following deliverables:

- A plan for determining whether the fundraising goals are reasonable and attainable.
- An assessment of organizational readiness, including board and staff capacity for a major campaign.
- An analysis of the library's current donor base and prospect identification.
- A strategy for identifying and cultivating major donors for the La Crosse Public Library project.

It will also include:

- An assessment of interviewees' views about LPL's proposed campaign.
- An assessment of the relative appeal of the LPL's plans and needs as an objective of philanthropic support.
- Detailed quotes obtained from the interviewees—keeping identity confidential to ensure participants' most candid feedback—and an evaluation of how their thoughts, concerns and opinions will impact LPL's plans.
- Identification of constituent and philanthropic leaders whose involvement in the campaign are perceived to contribute to its success.
- Identification of the primary barriers to the campaign's success, as well as recommended strategies to overcome those obstacles.
- A realistic campaign goal.
- A chart of giving outlining the gifts needed for the campaign to be successful.
- An organizational structure that will best serve the campaign, including campaign staffing and/or volunteer leaders.
- The responsibilities of board members and other campaign volunteers and leaders.
- Campaign and fundraising policies, including a donor recognition plan.
- A timeline outlining the activities that need to be executed in order to implement the campaign, including training, identification, cultivation, solicitation, appreciation and communication.
- Campaign counsel recommendations to maximize your opportunities for success.

● Cost

Feasibility Study Fee: Our fee for the Feasibility Study, including the Campaign Readiness Review, case statement development, wealth screening, charitable foundation research, Campaign Assessment and final report, is \$48,000 plus expenses. One half of the fee (\$24,000) will be due upon the signing of this proposal by you. One-quarter of the fee (\$12,000) will be due upon completion of the second Campaign Readiness Review day and the final quarter (\$12,000) will be due on the day the report is presented to the board/staff. Expenses including but not limited to travel, lodging, meals, printing, binding and mailing will be billed monthly as they are incurred.

Estimated expenses for the Feasibility Study:

Case Statement printing	100 copies	\$5.00/each	\$500.00
Consultant expenses: (travel, meals, lodging, telephone)			\$5,000.00

● Authorization to Proceed

By signing the Authorization to Proceed, this shall become a binding Agreement between Kinetic Fundraising, Incorporated and La Crosse Public Library. Return one signed copy, along with your initial payment, to Kinetic Fundraising, Incorporated, P.O. Box 410046, Kansas City, MO 64141. Upon receipt of the signed contract, an authorized representative of Kinetic will sign the Agreement and return it to La Crosse Public Library. It is understood that this Agreement is not final until accepted by a representative of Kinetic Fundraising, Incorporated in the State of Missouri.

INITIATION OF SERVICES: This Agreement shall commence on January 1, 2026 and terminate on July 31, 2026, unless extended in a writing signed by the parties.

EMPLOYMENT RESTRICTIONS: La Crosse Public Library agrees that it will not, so long as this Agreement remains in effect, and for one year thereafter, hire or contract with any person who is or was a consultant or employee of Kinetic Fundraising, Incorporated during the term of this Agreement. This foregoing restriction applies 1) regardless of whether the consultant or employee worked on La Crosse Public Library business, 2) regardless of whether the termination of employment of consultant or employee was voluntary or involuntary, with or without cause, and 3) whether the position for which the consultant or employee is hired for by La Crosse Public Library is the same or similar to his or her role at Kinetic Fundraising, Incorporated. In the event that any court of competent jurisdiction finds the provisions of this paragraph to be too restrictive to be enforceable, the court shall redraw the provisions only as narrowly as is

necessary so as to make them enforceable, it being the intention of the parties that this provision shall be as restrictive against the consultant as is lawful.

CONFIDENTIALITY: The Parties agree to hold any and all Confidential Information in trust and confidence and not to disclose to a third party or use any and all Confidential Information without prior written permission from the disclosing party. The "Confidential Information" disclosed under this Agreement means all information disclosed to, observed or otherwise obtained by The Parties, whether in oral, written, visual or electronic form, about any and all marketing analysis, programs, plans and/or ideas relating to The Parties' products or operations in any form of presentations, discussions or communications, or about all products, programs, plans, profits, plants, processes, costs, technology, computer software or hardware or systems, research, areas of interest, equipment, operations, raw materials, trade secrets, or any other confidential or proprietary information of La Crosse Public Library or Kinetic and its parent companies, affiliates, subsidiaries, divisions or other business entities. Confidential Information includes all such information disclosed prior to, on, or after the date of this Agreement.

APPLICABLE LAW: This Agreement, and all of the rights and obligations of the Parties in connection with their relationship, shall be governed by and construed in accordance with the substantive laws of the State of Missouri without giving effect to principles relating to conflicts of laws.

STATE LAW COMPLIANCE: Both parties to this Agreement agree to comply with all applicable state laws regulating charitable appeals, including but not limited to, registering with the respective state agencies regulating charitable appeals where required. Kinetic Fundraising, Incorporated, will not at any time solicit funds, assets, or property for charitable purposes, receive or control funds, assets, or property solicited for charitable purposes, or employ, procure, or engage any compensated person to solicit, receive, or control funds, assets or property for charitable purposes. Kinetic Fundraising, Incorporated, will not have custody or control of contributions at any time. La Crosse Public Library exercises control and approval over the content, volume and frequency of all solicitations. La Crosse Public Library was formed and operates to be a community hub inspiring inclusion, learning and connection. Contributions to La Crosse Public Library are used to further these charitable purposes and to pay for expenses.

GEOGRAPHIC SCOPE OF FUNDRAISING COUNSEL SERVICES: Kinetic Fundraising, Incorporated's fundraising counsel services will be limited to the following state: Wisconsin. In addition, Kinetic Fundraising, Incorporated, shall only perform fundraising counsel services at such times in such states when: (1) La Crosse Public Library is registered to solicit charitable contributions with the state agencies regulating charitable solicitations, if required under applicable state laws; and (2) Kinetic Fundraising, Incorporated, is registered as a fundraising counsel with the state agencies

regulating charitable solicitations, and fundraising counsels if required under applicable state laws.

HANDLING OF CONTRIBUTIONS: At no time during the course of this arrangement will Kinetic Fundraising, Incorporated or its representatives have custody of or manage any contributions received in support of La Crosse Public Library.

ATTORNEYS' FEES: In the event a lawsuit is instituted by either Party concerning a dispute under this Agreement, the prevailing party in such a lawsuit shall be entitled to recover from the losing party all reasonable attorneys' fees, costs of suit and expenses (including the reasonable fees, costs and expenses of appeals), in addition to whatever damages or other relief the injured party is otherwise entitled to under law or equity.

ENTIRE AGREEMENT: This Agreement supersedes all prior agreements and understandings between the Parties to the extent that any such agreements or understandings conflict with the terms of this Agreement.

AMENDMENT AND WAIVER: This Agreement and each provision hereof may be amended, modified, supplemented or waived only by a written document specifically identifying this Agreement and signed by both Parties hereto.

SUCCESSORS AND ASSIGNS: Neither Party may assign this Agreement or any of such Party's rights or obligations hereunder to any third party or entity, and this Agreement may not be involuntarily assigned or assigned by operation of law, without the prior written consent of the non-assigning Party, which consent may be given or withheld by such non-assigning Party in the sole exercise of such Party's discretion. This Agreement shall be binding upon and inure to the benefit of each of the Parties hereto and their respective lawful successors and permitted assigns.

COUNTERPARTS: This Agreement may be executed in counterparts, each of which shall be deemed an original and which together shall constitute one and the same instrument.

AUTHORIZATION TO PROCEED AS DESCRIBED ABOVE:

Accepted on behalf of La Crosse Public Library

Date

Matthew J. Beem, Chairman and CEO
Kinetic Fundraising, Incorporated

Unleashing *Your* Power of Philanthropy.

Kinetic

P.O. BOX 410046 • Kansas City, MO 64141

KineticFundraising.com

LA CROSSE PUBLIC LIBRARY

Campaign Readiness Study & Capital Campaign Management Proposal



**LA CROSSE
PUBLIC LIBRARY**

November 10, 2025

Ellen Hongerholt, M.A.

Crescendo Fundraising Professionals, LLC

986 State 76, Houston, MN 55943

ellen@crescendollp.com

www.crescendoconsultingllp.com

(507) 459-1989

Firm Information

Company Background

Ellen Hongerholt, owner of Crescendo Fundraising Professionals, has 25 years of experience in the capital campaign field, managing 48 capital campaigns, with 24 of those campaigns serving municipalities and nine library capital campaigns. Through the Campaign Readiness Study Summit and Capital Campaign process, Ellen and company's advisors will help you determine an attainable goal, cultivate relationships with key volunteers, identify potential major gifts, favorable conditions and create strategic tools that will support bringing the project to life.

Crescendo's approach specifically aids municipal facilities like libraries that do not have an active annual fundraising effort. This requires specific skills to set campaign on a trajectory to garner needed major capital philanthropic support.

Together, we will identify an attainable goal, the timeline that will expeditiously and effectively articulate the case statement, develop a solid foundation for the campaign, cultivate and assess your top-level prospective donors, and carefully train volunteers for cultivating relationships before solicitation begins.

The firm's consultants are committed to delivering a strategic process using a volunteer-driven and donor-centered approach, which engages volunteers and cultivates the growth of donors' individual joy and excitement. This results in a closer alignment to your mission and goals. Crescendo's hallmark is hands-on, personal attention from our multi-advisor team. This intensive support helps to quickly develop confidence as the campaign foundation is developed and solicitation begins. This process will be tailored to your unique needs which will continue to support your future goals.

Crescendo has been able to help secure and exceed goals in as little as five months as evidenced by the Irvine Park Zoo and Welcome Center & Aviary Campaign in Chippewa Falls, Wisconsin. However, the process usually takes approximately 12 to 14 months or longer depending on the total goal.

Pledges are typically remitted over three to five years. Short-term financing is required if construction expenses are included in the campaign goals as pledges are remitted.

Utilizing specific planning steps, Crescendo will help guide your campaign through developing cultivation and solicitation materials and completing a preliminary feasibility/campaign readiness study which we refer to as a Campaign Readiness Study. This process instills confidence, urgency, and momentum. Benefits of working with the Crescendo team include:

- Knowledgeable advisors who offer backgrounds in philanthropy, fundraising, capital campaigns, marketing, advertising, public relations, grant writing, volunteerism, and digital media who hold master's degrees in key fields.
- Personalized solicitation training and grant writing to secure major gifts, grants, grassroots giving, and contributions from local and national foundations.
- Proven, effective campaign strategies and execution of detailed timelines.
- Efficient project management with consultants who work with your staff daily, once-a-week for staff consultant touch-base meetings and on-site monthly for regular campaign meetings.
- Coordination of campaigns involving 50-75 more volunteers.

It would be an honor to serve this proposed expansion project. Thank you for considering Crescendo.

Firm Information

References

City of Eau Claire, Wisconsin, L.E. Phillips Memorial Public Library, 400 Eau Claire St., Eau Claire, Wisconsin 55701; Kimberly Hennings, Deputy Library Director; 715-839-6225, kimberlyh@eauclaire.lib.wi.us; L.E. Phillips Memorial Public Library .

\$18.5M Renovation and Expansion Project for the City of Eau Claire; City Bonded for \$11.5M for renovation and upgrades. A private fundraising Campaign of \$7M added a third floor and for other improvements including \$11.5M from the City of Eau Claire.

City of Chippewa Falls, Wisconsin, 30 W. Central St., 54729 Dick Hebert, retired Director of Chippewa Falls Parks, Recreation and Forestry; 715-215-0511, dickhebert6590@gmail.com.

Campaign Readiness Study and \$4.2M for an Expansion and Renovation of Irvine Park Zoo to construct a Welcome Center and Aviary Campaign and \$2M for Chippewa Riverfront.

Somerset Public Library Expansion Campaign, 208 Hud St., Somerset, Wisconsin 54025, Kay Walsh, President, Board of Trustees; 715-247-3423, 612-655-5704 pkwalsh@somtel.net

Renew Somerset Library Campaign initiated a \$3.5M Campaign to triple the size of the library.

Faribault Area Senior Center, Faribault, Minnesota. Now named Buckham West, 19 West Division St. Faribault, Minnesota. Former Senior Center Director, retired, Mona Kaiser, Mona_kaiser@msn.com; 507-456-1866.

Funds raised through capital campaign combined with space from a former YMCA building provided an expanded facility not only for a growing need for the Senior Center but also to provide space for the City of Faribault to provide programming, thus creating a more fiscally sustainable community resource.

City of Wabasha, Minnesota, and Wabasha Port Authority; Capital Campaign for the National Eagle Center, Don Jacoby, VP Agristar, Campaign Co-chair: mdjacoby@gmail.com; 612-270-8248

A capital campaign was initiated by the City of Wabasha and the Port Authority to increase support from local base to grow the center from a 2,500 sq. ft. storefront to a 14,500 center attracting more than 100,000 guests in less than three years. Worked to create the case for support while merging national, local, tribal and state funding streams to broaden overall funding and support.

History, Experience & Track Record

Crescendo brings 25 years of experience to the capital campaign process with nine of those projects specifically for library studies and capital campaigns.

Three Most Recent Campaign Readiness Studies / Feasibility Studies Crescendo have completed include the following projects:

1. **Western Dairyland Economic Opportunity Council of Eau Claire, Wisconsin.** Crescendo was hired in the summer of 2024 to determine whether \$6.4M could be fundraised for a Day Resource Center for the homeless. The study determined the goal and mission would be accepted by the Eau Claire area. The pre-campaign began in April of 2025 to fundraise the \$6.4M goal. Solicitations started in July. More than half of the goal had been secured as of November 7.
2. **The Village of Fall Creek Wisconsin and Public Library of Fall Creek, Wisconsin** contracted with Crescendo to analyze whether \$4M could be fundraised for a new Village Center and Library in coordination with a \$4.25M State of Wisconsin Flexible Facilities Grant. The firm determined that between \$3.25M and \$3.5M was an achievable goal. The Village contracted with Crescendo to manage a fundraising campaign and requested the firm to fundraise an increased goal of \$3.75M. The campaign Launched in May 2025 and presently has secured \$2.2M in cash gifts and pledged contributions..
3. **Minnesota Marine Art Museum of Winona, Minnesota** contracted with Crescendo to determine the feasibility, process and strategy needed to fundraise \$6.7M for an expansion and renovation project. The firm determined the philanthropic community would support the project at a lower amount of \$2.75 to \$3.25M. The-pre-campaign has recently begun.

Understanding of the Local Philanthropic Landscape

La Crosse Experience

Crescendo Fundraising has managed two successful capital campaigns in La Crosse, one for \$2.1M for the Children's Museum of La Crosse and one for \$1.6M for Habitat for Humanity of the La Crosse Area in the last 10 years. A study was also completed for Outdoor Recreation Alliance, but the organization decided to attempt to raise a \$3M goal on their own.

Ellen Hongerholt increased Family & Children's annual giving by \$750,000 to exceed \$1M as the Director of Advancement from 2021 to 2024.

Three members of the team also have a knowledge of the philanthropic community as current members of the Association of Fundraising Professionals of the Upper Mississippi River Valley or past Board members of this organization.

The team has a wide range of experience understanding the unique nature of the La Crosse area in terms of philanthropy and would bring a host of benefits to La Crosse Public Library Campaign.

Project Plan

Phase I - Campaign Readiness Study

A comprehensive assessment report is completed regarding the capacity and strategy which determines whether the fundraising goals are reasonable and attainable for the proposed campaign with the following focus:

- Respondents' views on the project tested by the study.
- Board interviews to determine organization readiness.
- Purpose and procedures of the study.
- Benefits of the project by key members of the philanthropic community.
- Support of the proposed fundraising campaign and goal.
- General economic condition of the area.
- Key benefits the region will experience upon completing the campaign.
- Review of area fundraising campaigns which are ongoing or being planned
- Key potential campaign leadership.
- Self-identification of leaders' intent to serve on specific committees.
- Lead gifts.
- Favorable factors and challenging factors.
- Gift table of the goal range from the study responses.

The careful analysis of:

- 60 to 75 face-to-face, personal, and confidential interviews.
- An online public survey totaling approximately 200 or more responses will be analyzed and presented with a detailed course of action.

Names of potential lead donors including all possible donors who suggest early philanthropic interest are identified in relation to the total gift pyramid. Crescendo will prepare a job description of suggested committees and their roles to serve as a basis to ask respondents of their interest in one or more pre-campaign and campaign committees.

Results will effectively identify the amount which will achieve success in a well-organized and managed capital campaign. Studies are fascinating tools. Crescendo's Campaign Readiness Study Summit provides a strong source of information to assess the capacity and interest in a capital fundraising drive.

The Campaign Readiness Study will help continue to open doors for the client to new stakeholders and provide credibility for the campaign as you seek advice and financial support from the philanthropic and business community.



Project Plan (continued)

Phase I - Campaign Readiness Study Summit Details & Timeline

Duration: 4 Months

- Crescendo reviews background materials and assists in creating a mini case summary.
- Crescendo prepares all steps for completing the study, a comprehensive 1-day in person event to gather feedback for the campaign readiness study.
- Preparation and execution of study committee meeting to gather study participants.
- The client's volunteers will help identify key stakeholders to recruit for the focus groups during the study and the suggested respondents for the personal, confidential interviews.
- Crescendo will prepare and coordinate the materials including drafting letters to potential study respondents, provides scripts for follow up phone calls to secure participation, preparing materials for the summit including the online survey for the public, providing direction for social media promotion and news releases encouraging participation, providing emails to your database requesting the public to respond to the survey, etc.

Crescendo will :

- Prepare materials and the interview schedule, which will be populated with respondents from client follow up.
- Complete interviews of top 60 to 75 individuals via the Study interviewing process.
- Coordinate, teleconference or telephone interviews that will also be completed for those respondents out of the region.
- Analyze all data including interviews, focus groups, additional information gathering, and online surveys.
- Write and prepare the comprehensive report.
- Present the formal results to the study committee and Board of Directors with recommendations for action steps.

Organizational and planning support is required to be provided by the client. The support will include tasks associated with executing the summit details from the study committee or other volunteers. This is estimated to amount to 10 to 15 hours per week for 12 to 16 weeks. This will include locating contact information for the respondents, completing mailings, completing follow up personally, via telephone or email with prospects, emailing calendar invitations to respondents, and other correspondence.

Phase I - Deliverables

- Identify strategic priorities from donors.
- Recommendations for the final goal and proposed achievable gift calculator.
- Timeline for strategic capital campaign implementation.

Project Plan (continued)

A plan for determining whether the fundraising goals are reasonable and attainable

The feasibility study will determine if the goal is reasonable and attainable. If it is determined the goal is too high or too low, Crescendo will recommend a goal that will be realistic and attainable.

Assessment of organizational readiness, including Board and staff capacity for a major campaign

Crescendo will determine the degree to which Board members share a clear, unified understanding of the project's purpose, benefits, strategic importance and their specific involvement based on clear job descriptions.

Where needed, the advisors will assist in refining messaging and providing talking points to ensure the Board can articulate a compelling narrative consistently and confidently.

Campaigns are most successful when Board members are willing to be visible champions. Through confidential interviews and discussions, we will evaluate:

- Confidence in discussing the project with donors, community leaders, and partners.
- Any hesitations, concerns, or questions that should be addressed early in the process.

A communication plan outlining interaction between library staff, the Library Board, and your organization

Our approach is built around clear, consistent, and purpose-driven communication that keeps the Library Board, library leadership, and our campaign team aligned throughout the duration of the project. The firm will support and guide the campaign while ensuring that the Library remains the face and voice of the effort within the community. Crescendo will have weekly meetings with the Executive Director, Campaign Co-Chairs, and key stakeholders and monthly meetings with each committee.

The consulting team drafts all campaign messaging (case materials, talking points, donor language, public communications) and routes all materials through Library leadership for review before being shared publicly. This ensures accuracy, tone alignment, and stewardship of the Library's mission and voice.

Project Plan (continued)

Analysis of the library's current donor base and prospect identification:

Crescendo's approach to major donor identification and cultivation combines data-driven research with relationship-based engagement to build a strong base of lead and leadership gift commitments for the La Crosse Public Library project.

Donor and Stakeholder Mapping

We begin by reviewing existing donor history and community relationships held through the Library, this includes:

- Past giving to library initiatives, cultural and educational organizations, and community projects.
- Business and corporate community ties.
- Foundation partners and grant-making entities with interests in education, literacy, and community development.
- Influential families and long-standing civic supporters in La Crosse.

This mapping helps identify individuals and organizations with both capacity and affinity for the Library's mission.

Philanthropic Capacity Research

We pair relational knowledge with publicly available philanthropic and wealth-indicator data to:

- Estimate gift capacity ranges.
- Segment the donor pool into major, leadership, and mid-level prospects.
- Determine potential lead gift candidates, challenge grant funders, and naming opportunities.

This ensures that the campaign goal and gift table are aligned with realistic donor capacity.

Early Engagement Through the Campaign Readiness Study

One-on-one interviews during the study phase provide critical insight into:

- Interest in the project.
- Motivations and values that influence giving.
- Potential hesitations or barriers to support.
- Readiness to play a leadership or ambassadorial role.

This phase acts as the first step in cultivating relationships developed in trust and shared purpose.

Volunteer Leadership Recruitment

Major gifts are most successfully secured through peers. The firm will work with Library leadership to identify and recruit highly respected community members to serve as:

- Campaign Co-Chairs.
- Steering Committee members.
- Other Campaign Committees

These volunteers help open doors and initiate conversations at the highest philanthropic levels.

Personalized Cultivation Plans

For each major donor prospect, the firm will develop tailored engagement strategies which may include:

- Project briefings.
- One-on-one conversations with the Library Director or Board leadership.
- Case materials and project updates designed to match donor interests.
- Opportunities to involve family members, professional advisors, or business partners.
- Cultivation remains relational, steady, and respectful — emphasizing shared investment in the future of La Crosse.

Project Plan (continued)

A strategy for identifying and cultivating major donors for the La Crosse Public Library project

Our major donor strategy will be relationship-centered, data-informed, and tailored to the philanthropic landscape of the La Crosse area. We will work closely with Library leadership to build a strong base of early confidence and lead support for the project.

Identify and Prioritize Major Donor Prospects

Crescendo will develop a prioritized prospect list segmented into lead gift, major gift, and annual gift categories, with estimated gift capacity ranges to guide strategy.

Major gifts are most effectively cultivated peer-to-peer. We will identify, recruit, and support respected community members potentially including Library Board members, and organizational partners to serve as Campaign Co-Chairs or on the Steering Committee. These individuals will:

- Help open doors to priority prospects.
- Participate in cultivation conversations.
- Model philanthropic leadership through their own early commitments.

Personalized Donor Cultivation Plans

For each major donor prospect, the firm will develop an individualized engagement plan that may include:

- Personal meetings with the Library Director and campaign leadership.
- Small, invitation-only project briefings or library tours.
- Mission-focused storytelling that connects the donor's values to the Library's public impact.
- Strategic project updates timed to deepen interest and momentum.

Crescendo's approach emphasizes *listening first* and aligning each donor's philanthropic goals with the Library's vision.

Strategic Case Messaging and Materials

We will develop and refine compelling donor-facing case materials, including a case statement, talking points, and presentations that articulate the project's community value, urgency, and long-term impact. Messaging will ensure the Library remains the authentic community voice throughout.

Thoughtful, Prepared Solicitation

Once relationships are established and interest is clear, solicitations will be coordinated, intentional, and based on:

- Demonstrated donor capacity.
- Their engagement history and expressed motivations.
- Appropriate naming opportunities or recognition plans, where appropriate.

Solicitations will be made by a pair consisting of a volunteer peer leader and the Library Director (or designated campaign representatives), supported by our team for strategy and preparation.

Project Plan (continued)

Campaign Support: Phase II - Pre-Campaign and Prospect Cultivation and Development

(5 to 6 Months)

Develop a thorough plan for the pre-campaign and campaign to recruit volunteers.

A well-planned pre-campaign phase shortens the campaign duration because it successfully stages donors and the community for the highest possible level of giving. This process requires a tremendous amount of foundational work must take place before any solicitation begins.

Phase II - Pre-Campaign Details & Timeline

Duration: 4-6 Months

- Assist staff and committees in establishing the Pre-campaign Steering Committee with suggestions identified during the study, and with involvement from the committee, key corporate leaders, and local philanthropists.
- Create continuity and credibility during the campaign by developing the following committees: Steering, Case Statement, Leadership, Prospect, Building, Finance and Communications.
- Present a detailed timeline of campaign activities which, although a targeted effort, should be recognized as a fluid document to adjust as needed as the progresses.
- Establish a campaign office and support systems for the campaign with the current staff members assigned to assist in these roles.
- Work with the staff to ensure protocols in gift acceptance, acknowledgement, and pledge substantiation consistent with IRS requirements.
- Develop the campaign communications budget.
- Develop and refine the donor recognition plan with committees, staff and Steering Committee.
- Develop and implement the capital campaign strategy.
- Train the staff and committee members in solicitation techniques.
- Develop collateral materials for the Launch of the capital campaign with staff and volunteers.
- Track progress and ensure the campaign remains a priority for the client.
- Develop and validate a comprehensive case statement and FAQ.
- Organize and implement a comprehensive communications plan.
- Develop and refine a master prospect list of potential contributors including identifying new donors.
- Enlist and recruit top-level leadership for the capital campaign.
- Create compelling campaign materials to support volunteer efforts and encourage generous financial support including electronic giving methods.
- Create a gift table of pledges needed and utilize it to accurately target donors.
- Target donors and gifts based on a donor recognition plan to engage donors and increase giving.

Project Plan (continued)

Phase II - Deliverables

- Develop Donor Recognition Plan
- Create Campaign Brand
- Prepare Pledge Commitment Form
- Case Statement Validation Kit
- Letter of Inquiries for Corporate Proposals
- Grant Timeline and Templates
- Talking Points
- Giving Societies
- Prospect List
- Press Release(s)
- Communications Plan
- Campaign Webpage
- Community Presentation Kit
- Acknowledgement Letter(s)

Phase III - Campaign Solicitation

Crescendo uses a highly personalized, effective, multi-consultant on-site approach which best harnesses volunteer involvement and cultivation to provide widespread appeal, effectiveness, urgency, and momentum to complete the campaign process efficiently with the best results.

This hands-on support from multiple, regularly involved advisors sets our firm apart from others. Our intensive process results in quickly securing goals which provides a more cost effective process. The entire timeframe for the campaign usually takes approximately 12 to 14 months with larger goals requiring a longer span.

Project Plan (continued)

Phase III - Campaign Solicitation Details & Timeline

Duration: 7-9 Months

- Develop and implement the capital campaign strategy.
- Train the staff and committee members in fundraising techniques.
- In consultation with staff/volunteers, develop collateral materials for the Launch of the capital campaign.
- Track progress and ensure the campaign remains a priority for the client.
- Help identify priorities, new relationships, and new sources for fundraising.
- Research, develop and implement grant strategy
- Develop and refine a master prospect list of potential contributors including identifying new donors.
- Enlist and recruit top-level leadership per region for the capital campaign.
- Review or refine gift acceptance and acknowledgement policies and procedures.
- Publicly launch the campaign to the community.
- Develop a Matching Challenge Grant strategy to energize the campaign following the Launch to encourage public support.

Phase III - Deliverables:

- Solicitor goals per month
- Weekly progress reports
- Major gift management strategy
- Division action plans per month
- Guest Host Event
- Public Launch Event Plan
- Launch Script & Program
- High-level, engaging campaign video
- Solicitation Kit creation
- Launch Press Release
- Challenge Grant Strategy
- Year End Ask Strategy
- Direct Mail Strategy
- Post Launch Press Release
- Post Launch Communications Strategy
- Customized Solicitation Letters
- Challenge Grant Post Launch Strategy
- Quarterly Acknowledgement Letter Updates



Firm Information

Ellen Hongerholt, President/Founder, will serve as the firm's primary contact. The following advisors will support this project:



Ellen Hongerholt, M.A.

Founder and President

Ellen received her master's degree in Philanthropy and Development from Saint Mary's University of Minnesota and undergraduate degree from Winona State University. She has 30 years of experience in the fundraising field and has met 48 capital campaign goals at the helm of Crescendo Fundraising Professionals and Crescendo Consulting, LLP over 25 years. Her education, experience, and powerful strategic vision is combined with strong interpersonal skills, which helps build meaningful relationships with individuals from diverse backgrounds and win campaign goals for her clients.



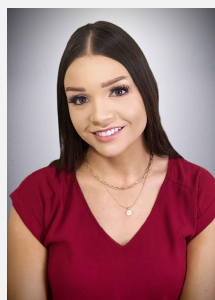
Nancy M. Brown, M.A.

Nancy has devoted her career to working in the nonprofit sector, previously as the President and CEO of the Winona Community Foundation. She has more than 28 years' experience working in healthcare and higher education fundraising, charitable estate planning, grantmaking, and organizational leadership. She has served as a mentor and consultant in fund development and as a faculty member in two universities' Master's in Philanthropy & Development programs. Her depth of experience and strong philanthropic resume provide excellent support for Crescendo clients.



Jillian Harris, M.A.

Jillian uses her Master's degree in Strategic Communications and a certificate in Nonprofit Leadership to aid clients' strategic communications efforts allowing her to effectively convey their mission and the impact for organizations that resonate with donors and stakeholders alike. She is passionate about serving Crescendo clients, and thrives in collaborative environments where she can leverage her skills to make a tangible difference for municipalities and non-profits with excellent organizational skills to manage the myriad and complicated landscape of capital campaigns.



Nicole Hall

Nicole received her undergraduate degree in Recreation Management from UW-La Crosse. Nicole is a seasoned nonprofit development/fundraising professional, with eight years of proven success in fundraising, primarily in healthcare development. Throughout her career, she has demonstrated leadership and strategic thinking to execute comprehensive fundraising strategies which generate revenue and build lasting relationships with stakeholders and donors. Nicole's efficiency and organization provides clients with powerful engagement strategies.



Peggy Derrick, M.A.

Peggy Derrick, M.A., has years of experience in non-profit management, fundraising, and grant writing. She was formerly the Curator and Executive Director for La Crosse County Historical Society. Under her leadership, the organization grew into a reputable, professionally run community asset, and doubled its staff while developing engaging, popular programming. Derrick supports the grantwriting process and other writing goals for clients.

ELLEN HONGERHOLT, M.A.

EDUCATION

Bachelor of Arts in Mass Communications and Public Relations, cum laude	1981-1985
Winona State University, Winona, MN - Minor in Sociology	
Master of Arts in Philanthropy and Development	1995-1998
Saint Mary's University of Minnesota, Winona, MN	

WORK EXPERIENCE

Crescendo Fundraising Professionals, LLC, Houston, MN	2015-Present
Founder and President	

Plan, organize and manage fundraising studies, Capital Campaigns, annual fund development programs and endowment Campaigns with stellar results
Implement proven, effective fundraising and volunteer management techniques

Saint Mary's University of Minnesota, Winona, MN	2009-2010
Philanthropy & Development Adjunct Professor	
Capital Campaign and Major Gifts	

Taught effective Capital Campaign management processes and major gift solicitation

Crescendo Consulting, L.L.P., Winona and Houston, MN	2001-2015
Founder and Managing Partner	

Planned, organized, and managed Campaign planning readiness studies
Planned successful Capital Campaigns, annual fund development and endowment Campaigns

Saterbak and Associates, La Crosse, WI	1997-2000
Consultant and Vice President	

Managed turn-key fundraising Campaigns for municipalities and non-profits

YWCA of Winona, Winona, MN	1994-1997
Interim Executive Director and Development Director	

Managed a team of 33 full-time and part-time staff members
Fundraising and financial development
Marketing and Development Director

Community Memorial Hospital, (CMH) Winona MN	1986-1992
Communications Coordinator	

Lead writer for hospital donor and patient magazine, Wrote and designed hospital, donor publications and news releases, grant researcher and writer; secured first federal grants for CMH

JILLIAN HARRIS, M.A.

Crescendo Fundraising Professionals, Consultant

Des Moines, Iowa

September 2019 - Current

- Lead strategic planning, case development, and communications for multimillion-dollar capital and endowment campaigns across Wisconsin, Minnesota, and Iowa.
- Craft compelling case statements, feasibility studies, proposals, and donor communications to drive philanthropic engagement and align campaign messaging with each client's mission and public purpose.
- Advise nonprofit boards, campaign committees, and executive leadership on fundraising best practices, volunteer recruitment, and donor cultivation strategies to strengthen organizational capacity.
- Analyze philanthropic data and community feedback to inform campaign readiness, goal setting, and gift table design, ensuring realistic, mission-aligned fundraising strategies.
- Collaborate with municipal, foundation, and corporate partners to secure public and private funding commitments, including major gifts, challenge grants, and state-level funding applications.

Product Manager, Application Product Line

John Deere, Des Moines Works, Ankeny

June 2019 – October 2020

- Launched MY21 Application updates
- Gathered and implemented feedback from dealers on SPFH enhancements
- Collaborated with Hagie to manage the go-to-market strategy for the new LS475
- Found a gap with the DSS 4044 and moved it to a factory install option and increased factory revenue ~ 2M
- Worked with customers and stakeholders to determine new Name and Numbering for the Global Application Product Line

Platform Content Coordinator

John Deere, Intelligent Solutions Group, Urbandale

July 2016 – July 2019

- Planned and executed dealer validation focus groups
- Determined course of action, scheduled activities, and provided detailed reference documentation and project plans globally
- Led meetings with regional and platform representatives to coordinate and schedule activities that directly impacted the Crop Harvesting and ISG product lines

Region 4 Customer & Product Support Coordinator

John Deere, Marketing and Advertising Center, Olathe

June 2015 – July 2016

- Monitored monthly department budgets to ensure budgets are on track
- Wrote articles for John Deere Online, viewed company wide
- Planned the annual Customer & Product Support Global week-long meeting
- Organized yearly training events in Orlando, Florida for Territory Customer Support Managers (CEP)

NANCY M. BROWN, M.A.

Nonprofit Consulting, 2012 – present

- Consultant/Crescendo Fundraising Professionals, LLC, capital campaign and nonprofit consulting
- Adjunct Faculty/La Grange College (Georgia) & Saint Mary's University of Minnesota, Master's in Philanthropy & Development program; Viterbo University, Certificate in Nonprofit Leadership; Minnesota State College Southeast, Certificate in Nonprofit Management
- Consultant/Vice President, Thompson & Associates, charitable estate planning
- Independent consultant assessing development operations, mentorship, and training

President/CEO, May 2019 – December 2024, Winona Community Foundation

- Lead, manage, and direct the strategic position and overall operations of the foundation

Senior Director of Development November 2016 – May 2019, Saint Mary's University of Minnesota, Winona, MN

- Develop individual donor strategies for qualified prospects to inspire increased financial commitments

Executive Director of Development, April 2003 – August 2012, Winona Health, Winona, Minnesota

- Lead the strategic and operational activities of the Winona Health Foundation and Winona Health's Volunteer Services Department including budget and personnel management
- Lead the Foundation Board of Directors and other key positions within the organization and community to create and develop broad-based financial support of Winona Health

Director of Major Gifts and Advancement Services, May 2000 – April 2003, Winona State University, Winona, Minnesota

- Managed phonathon, employee campaign, direct mail program, matching gifts program, and corporate and foundation relations
- Identified, cultivated, and solicited prospective and current donors face-to-face, and via telephone and written communications
- Developed advancement policies and procedures

University Advancement, Jan 1997 – May 2000, University of Wisconsin-Green Bay

- Interim Director University Advancement, Jan 2000 – May 2000
- Coordinator of Major Gifts, Jul 1999 – May 2000
- Coordinator of Annual Giving, Jan 1997 – Jul 1999

Director of Annual and Planned Giving, Oct 1995 – Jan 1997, Marian College, Fond du Lac, Wisconsin

NICOLE HALL

CONSULTANT | CRESCENDO FUNDRAISING PROFESSIONALS | July 2024 - Present

- Support nonprofit organizations in achieving fundraising success through capital campaigns
- Provide effective analysis of capital campaign potential through studies for nonprofit clients
- Prepare personalized written content for nonprofit clients
- Partner with nonprofit clients to provide solutions for their specific needs

DEVELOPMENT MANAGER | VERNON MEMORIAL HEALTHCARE FOUNDATION | June 2021 - October 2024

- Provided effective strategy and leadership to the foundation and built relationships with stakeholders
- Planned and executed all of fundraising efforts, including annual giving, events, sponsors, major gifts, and grants
- Partnered with the Board of Directors to effectively govern the foundation
- Designed and implemented a comprehensive marketing plan and spoke eloquently at community opportunities

CMN HOSPITALS SPECIALIST | GUNDERSEN MEDICAL FOUNDATION | August 2019 - June 2021

- Planned and implemented fundraising strategies for Children's Miracle Network Hospitals
- Cultivated relationships with local and national partners to increase campaign and event revenue
- Created and executed comprehensive marketing plans for campaigns, and spoke effectively at events

DEVELOPMENT COORDINATOR | GUNDERSEN MEDICAL FOUNDATION | November 2017 - August 2019

- Planned special events including coordinating committees, internal departments, donations, and vendors
- Designed marketing materials for events and campaigns
- Performed prospect research, daily census review, database clean-up, and administrative support

UNIVERSITY OF WISCONSIN LACROSSE | September 2010 - May 2014

Bachelor's Degree: Recreation Management | Minor: Inclusive Recreation | Graduated Summa Cum Laude

PEGGY DERRICK, M.A.

CRESCENDO FUNDRAISING PROFESSIONALS, Houston, MN

Consultant, July 2024-present.

- Research and write campaign case statements, grants, and other campaign materials

COULEE REGION RSVP, La Crosse, WI

Development Coordinator, May 2023-present.

- Grant writing
- Donor relations
- Database management
- Planning and executing fundraising events

LA CROSSE COUNTY HISTORICAL SOCIETY, La Crosse, WI

Executive Director January 2017-December 2022 (retired)

- Directed all aspects of LCHS operations
- Fundraising and grant writing
- Programming oversight: planning, implementation, review
- Expanded professional staff
- Engaged with diverse communities within the region and strove to provide inclusive representation in LCHS programming
- Created annual budgets and financial reports

Curator October 2009-December 2016

- Responsible for day-to-day operations, supervision of seasonal employees, Office Manager and volunteer docents and collections intern program.
- Fundraising, including establishment of an annual Year-End appeal
- Grant writing
- Programming oversight: planning, implementation, review
- Curatorial responsibility for collection of over 10,000 objects of material culture documenting La Crosse's history.

Education

- University of Nebraska – Lincoln. M.A. Textiles, Clothing & Design, with an emphasis on Quilt history, 2008.
- University of Wisconsin-La Crosse, College of Liberal Studies, B.A. Fine Art, 1990.

Feasibility Study/Campaign Readiness Study Schedule and Timeline

Proposed work plan and timeline, detailing key phases and deliverables that align with the project schedule (continued).

Month 1

- La Crosse Public Library and Crescendo enter into contract.
- Begin preparation for completing all steps in the Campaign Readiness Study.
- Complete wealth screening of region.
- Review background materials and prepares materials following two discovery meetings with the region's key stakeholders and key leaders.
- Identify key stakeholders to recruit for the Study Committee at pre-meeting.
- Coordinate materials including design, background, history, studies, planning, write mini case, prepare materials for Study Committee meeting.
- Support of volunteer committees, which will include the Board of Trustees, and La Crosse Library staff in recruiting Study Committee members.

Month 2

- Identify key informants to serve as respondent interviewees.
- Crescendo meets with Study Committee of approximately 12 to 16 individuals comprised of representatives, staff, volunteer committees, key stakeholders and regional leaders to explain the project, study timing, process, expectations from the Study Committee and general materials.
- A letter will be prepared by Crescendo as a follow up to requests to provide input.
- Send letters to key individuals who have been identified to ask to be interviewed or attend a focus group.
- Volunteers follow up with interviewees of their choice with whom they share a relationship to personally ask for interviewees' involvement.
- Crescendo provides letter drafts, scripts and lists of duties during this process.
- Research Respondents during the Study, hold focus groups, provide promotional ideas for Public Community Survey.

Schedule and Timeline (continued)

Proposed work plan and timeline, detailing key phases and deliverables that align with the project schedule (continued).

Month 3 to 4

- Crescendo analyzes all data including interviews, focus groups, additional information gathering and Public Community survey.
- Write and prepare the comprehensive report. Crescendo presents the formal results to the Board, Staff, and Campaign Readiness Study Committee with recommendations for action steps.
- The campaign begins capitalizing on momentum from the study with further cultivation steps prior to a campaign.

Administrative support is required to be provided by the client. The administrative support will complete tasks associated with executing the Study details from the study committee or other volunteers. This is estimated to amount to 10 to 15 hours per week for 12 to 16 weeks. This will include locating contact information for the respondents, completing mailings, completing follow up personally, via telephone or email with prospects, emailing calendar invitations to respondents, and other correspondence.

Capital Campaign Cost

Final Deliverables Resulting from the Feasibility Study/Campaign Readiness Study

The proposed study timeline and suggested deliverables, with details of the study's steps will be provided for the client. Consultants will prepare a mini case summary outlining the role and goal of the proposed campaign to seek feedback from potential donors; create the job description for the Study Committee that will oversee the plan and execution of the study; prepare a formal letter and a proposed script for the client, Study Committee, or other client stakeholders to invite participation in the study.

Crescendo will create the suggested questionnaire for in-person responses and public input, including a hyperlink for client staff to disseminate through electronic newsletters or the website and implement the Campaign Readiness Study Summit. The consultants will prepare a written, comprehensive report detailing favorable conditions, challenging conditions, the optimal goal amount, and the recommended timeframe for the campaign to achieve success; a two-page executive summary; and a presentation outlining the results with a PowerPoint presentation.

Campaign Schedule and Timeline (continued)

Steering Committee	Prospect, Leadership Committees Divisions	Communications Committee	Case Statement Committee Grant Development
<i>Weeks 1-4</i>			
Overview meeting with Staff. Review: Timeline, promotional budget draft, volunteer leadership. Review and discuss draft Donor Recognition Plan.	Identify possible Co-chairs for Prospect Development and Leadership Development committees.	Staff and Crescendo planning.	Research on key area/regional, national foundations. Review self-identified committee lists from study. Recruit case statement Co-chairs.
Planning with the client's Staff and Crescendo. Review self-identified interest in Pre-Steering Committee.	Recruit Prospect Committee Co-chairs.	Recruit Co-chairs. Communications committee job description.	Meet with potential Case Statement Co-chairs. Discuss committee recruitment.
Finalize materials for first committee meetings.	Recruit Prospect Committee.	Recruitment of committee members. Review the client's branding standards and policies.	Organizational Meeting. Review job descriptions. Brainstorm project benefits. Review timeline. Review solicitation kit samples. Research area demographic needs, studies, project rational.
Pre- Steering Committee Recruitment.	Recruit Leadership Committee Co-chairs. Recruit Prospect Committee.	Discuss and review possible image "bank" for all promotional materials. Discuss social media plan.	Review assignment elements. Research from volunteers. Discuss additional rational and other potential issues to focus on. Grant tracking form developed.

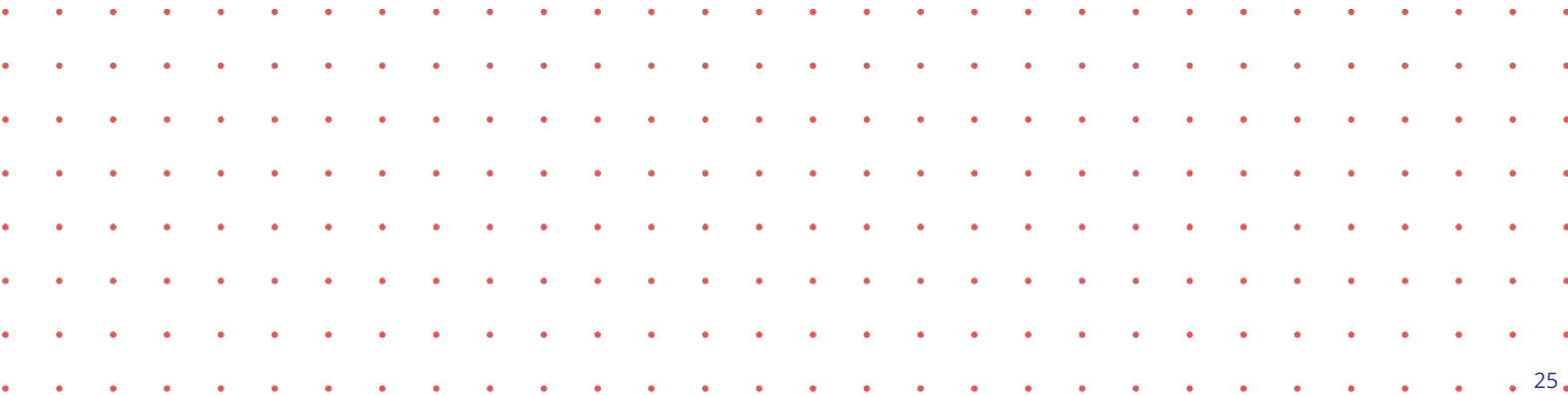


Steering Committee	Prospect, Leadership Committees Divisions	Communications Committee	Case Statement Committee Grant Development
Weeks 5-6			
Pre-Steering Committee Recruitment.	Organizational Meeting - Prospect. Review job descriptions. Review prospect coding ranges. Identify prospects from current lists and campaign readiness study lists.	First Organizational Meeting. Media/marketing background. Job descriptions. Communications timeline. budget. Brainstorm theme ideas.	Identify key questions and concerns from study. Review pre-case statement. Committee input. Ideas for design. All details outlined. Development grant management timeline.
Weeks 7-9			
Review progress on foundational elements including campaign Timeline and Budget. Review Preliminary Donor Recognition Plan. Committee reports.	Members. Identify General campaign Co-Chair candidates and Advance Division Co-chairs.	Review campaign (promotional/printing, details) Budget. Brainstorm theme/logo. Review case statement draft.	Develop FAQ from questions identified during the study from respondents. Review updates Committee input.
Weeks 10-11			
Steering reviews Case Statement and ongoing Communications Plan. Committee reports.	Continue prospecting members of top divisions to validate case statement draft. Requires physical address and/or email addresses. Review Case and FAQ.	Review draft case and FAQ. Finalize theme and logo. Brochure design discussion. Pledge cards and solicitation kit plan. Share details with design firm. Video planning meeting.	Review updates. Quotes for validation printing. Continual edits to Case Statement and FAQ. Review all validation elements. Ongoing grant research/writing.
Weeks 12-13			
Steering reviews Case Statement and Communications Plan. Grant update.	Review lists for validation with committee. Leadership Organizational Meeting. Assist campaign by asking those they know to validate campaign materials. Review General campaign Co-Chair job description.	Refine theme, logo, Design communications. FAQ layout. Brochure design in progress. Schedule dates for video interviews and filming B-roll footage.	Committee review, comment, suggestions. Continual edits to Case Statement, FAQ, Executive Summary.
Weeks 14-15			
Steering reviews Case Statement and Communications Plan.	All committees validate materials. Discusses top candidates to serve as co-chairs. Identified recruitment process.	Share Launch planning overview and timeline. Set tentative date. Choose venue.	Validations started in the community. Final Revisions on FAQ. Reviews list from prospect committee identifying relationships.
Weeks 16-17			
Steering validates Case Statement and reviews plan.	Final Leadership Meeting. Co-chairs should be named.	Further design and editing of all materials. Video concepts outlined. All committee validate materials.	Validation of Case Statement and FAQ in process. Validation questionnaires completed.

Steering Committee	Prospect, Leadership Committees Divisions	Communications Committee	Case Statement Committee Grant Development
Weeks 18-19			
Steering reviews Solicitation Kit elements and Communications Plan.	Co-chairs identify and recruit Advance Division solicitation team. Share Advance Division action plans with Co-Chairs and first level solicitation team.	Launch planning overview and timeline. Brochure design/layout completed. Video production firm. Identify tentative date and venue. Film video testimonials and B-roll.	Validation results. Final revisions from validation. Final copy editing and proofing of printed materials.
Weeks 20-21			
Steering approves Solicitation Kit for input and Communications Plan.	Finalize prospect lists in A/B divisions. Review and confirm potential gift ranges.	Review Launch planning timeline. Share video samples with committee. Identify video and Launch event testimonial speakers.	Final printing of solicitation kits underway. Case Statement Committee completed. Grants calendar finalized. Submit grants once completed.
Weeks 10-11			
Committee Reports. Handles key issues or concerns as necessary.	Organizational meeting of Advance Division. Review Advance Division Action Plans. Solicitation of Advance Division members by Advance Division Co-chairs and General campaign Co-chairs. Review lists.	Continue develop promotional materials and edit. Printing details finalized. Start Launch checklist. Crescendo analyze video for compelling messaging.	Grant writing continues.
Weeks 24-25			
Committee reports. Solicitation Training for Steering Committee and Advance team/ Co-chairs.	Share Challenge Grant plan with Launch Ask Event. Solicitation Training for Advance Division. Choose prospects. Major Gifts Division recruited.	Launch checklist: menu and theme ideas. Finalize speaker ideas. Editing. Develop tax brochure. Refine and review drafts. Final video takes completed as necessary.	Grant writing for private funding as needed.
Weeks 26-27			
Continue recruiting and training Advance Division team solicitors.	Advance Division reporting meetings. Share opportunities. Discuss any issues found during solicitation meetings. Continue soliciting. Major Gifts Division recruited. Reviews lists.	Continue developing promotional materials. Complete additional video production. Printing details finalized. Launch PPT begins. Launch checklist review.	Grant writing. Case Statement Committee asked to serve as Launch Guest Hosts.
Weeks 28-29			
Solicit Advance Division prospects.	Hold reporting meetings. Major Gifts Division Solicitation Training. Solicitation begins.	Plan speaker's bureau spreadsheet of area organizations' campaign communication.	Guest Host responsibilities for Launch with all volunteers.

Steering Committee	Prospect, Leadership Committees Divisions	Communications Committee	Case Statement Committee Grant Development
<i>Weeks 30-31</i>			
Pre-Steering Committee transitions to campaign Cabinet	Advance Division reporting meetings. Major Gifts reporting meetings. Continue assigning prospects and reviewing lists.	Continue Launch details and checklist. Meeting held at Launch venue. Launch script prepared by Crescendo. Staff input. Video complete and share with Steering committee.	Guest Hosts recruit guests.
<i>Weeks 32-33</i>			
Review status toward Launch goal Solicit top prospects. Plan Challenge grant Alliance.	Advance Division reporting meetings. Major Gifts reporting meetings.	Launch planning checklist updated. Launch script edits.	Guest Hosts recruit guests.
<i>Weeks 34-35</i>			
Review status toward Launch Challenge Alliance. Solicit prospects. Final lead gift solicitations push.	Advance Division reporting meetings. Final lead gift solicitations push. Major Gifts reporting meetings.	Continued final review of all materials. Print Launch program.	Guest Hosts recruit guests.
<i>Weeks 36-37</i>			
Review status toward Launch goal. Finalize all Challenge details.	Finalize as many Advance and Major Gift Division solicitations as possible.	Launch checklist updated. Tech rehearsal. Review final scripts and PPT. Launch sponsors and donors in script. Reminders to Guest Hosts.	Guest Hosts recruit guests.
<i>Weeks 38-39</i>			
Launch push to meet Advance and Major Gifts Division goals.	Launch Celebration!	Launch Celebration!	Launch Celebration!
<i>Weeks 40-41</i>			
	Status toward Challenge Grant Goal	Status toward Challenge Grant Goal	Status toward Challenge Grant Goal
<i>Weeks 42-43</i>			
Solicit prospects. Hold reporting meeting with volunteer captains to keep soliciting on track.	Prospect new donors for Final Chapter Divisions. Recruit Co-chairs for Final Chapter Division. Wealth Screening, as needed.	Media Challenge Grant status. Social media push to reach challenge grant.	Grant writing.
<i>Weeks 44-45</i>			
Plan next division with donors identified during prospect process.	Hold Organizational Meetings for Final Chapter Division. Review and refine lists and timing.	Community Announcement of Challenge Grant Status.	Foundation applications. Top prospect completion.

Steering Committee	Prospect, Leadership Committees Divisions	Communications Committee	Case Statement Committee Grant Development
Weeks 46-47			
Plan next division with donors identified during prospect process.	General Co-chairs solicit Final Chapter Division Co-chairs. Solicitation Training for Patron Division committee. Choose prospects.	Grass Roots Giving Planning.	Foundation applications. Top prospect completion.
Weeks 47-68			
	Ongoing solicitation.	Grass Roots Giving Planning.	Secondary grant options finalized.
	Ongoing solicitation.	Final Public Giving.	Secondary grant options finalized.
Final Public On-line Solicitations			
Celebrate!			



Feasibility Analysis Cost

Campaign Readiness Study

The Study is an intensive process involving time and effort by the client and volunteers to ensure Crescendo will interview the most capable respondents regarding interest and philanthropic propensity.

The cost for campaign Readiness Studies typically ranges from \$40,000 to \$60,000 based on the complexity of the project, the number of respondents required, and the general goal range.

The cost of the campaign Readiness Study is \$45,000 to assess a \$7M goal.

No expenses will be included in the contract for the campaign readiness study due to the close proximity of La Crosse Public Library.

Capital Campaign

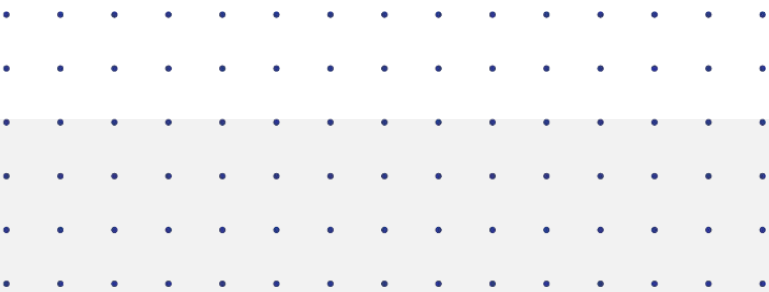
Every detail of a campaign will be orchestrated to reach the utmost potential on behalf of the campaign. While volunteer leadership is vital to a capital campaign, Crescendo must serve as the trusted advisor to make final decisions while working with the client’s team regarding any critical issues that arise and pertaining to all final decisions.

Staff time will cover planning, strategy meetings between consultants; planning, strategy and meetings with the client, volunteers and donors; training volunteers in the fundraising process; writing, editing, and evaluation of visual components and all design elements; proofing every written fact related to the campaign which would be approved before dissemination; planning timelines, event management, communications with hundreds of volunteers; e-mail, telephone and personal communications; solicitation training and reporting meetings.

Campaigns are moving targets! Crescendo must be able to continually assess the favorable conditions and anticipate potential challenges to be ahead of any issues which could affect fundraising. These are our general estimates:

- Consulting time for planning and execution of details and the process is estimated at 2,500 hours for meetings, strategic planning for all elements for the successful timing and elements of the campaign.
- Solicitation training and reporting meetings is estimated at 400 hours, as volunteers are the key solicitors. Volunteers have the best relationships needed to secure pledges from friends and colleagues. Advisors will support volunteers with the plan, process, solicitation guides, training, reporting and materials, support, communications, meetings, and hands-on assistance.
- Grant writing is included – identification, research, grant coordination of key details, writing grants and working with private foundation project managers.
- Marketing, copy writing/editing is estimated at 500 hours. Managing the development of all materials including the case statement, FAQs, brochure, pledge letters of intent, news release draft prep is a significant part of the consulting process in campaigns, and the accurate depiction of meeting events including the dissemination of minutes is also vital. Carefully crafting and articulating the campaign messaging is critical. Our well-planned and executed communications strategies have been invaluable in reaching campaign goals.

Capital campaign management consulting is estimated to cost from \$350,000 and \$375,000.



Capital Campaign Cost

If the goal is met sooner than anticipated, the campaign will conclude without completing payment of the contract.

All consulting fees are typically added to the goal amount, which allows a client to recoup these costs through the pledge remittance process over three to five years while pledges are paid.

No expenses will included in the contract due to the close proximity of La Crosse Public Library.

Crescendo will bill the client monthly. Payment is required for billing within 15 days of invoicing. Fees are not based on the goal or any percentage of what is raised, according to the Association of Fundraising Professionals (AFP) Code of Ethical Principles and Standards of Professional Practice, but on the time and expense taken to manage the campaign. The contract includes an opportunity for the client or consulting firm to conclude the agreement with one week’s notice in the unlikely event the appropriate support and volunteer assistance is not forthcoming for the campaign or the goal is reached.

The client is responsible for the campaign operating budget that will include all the expenses for the capital campaign such as administrative assistance to keep pledge records, supplies, postage, printing of communications’ materials, advertising, promotion, event planning, video production utilizing a high-level professional, mailings, and additional support literature required. Such expenses are expected to cost \$20,000 to \$22,000 depending on communications needs of the campaign determined during the study and pre-campaign.

In addition, administrative support is required to be arranged by the client for the study and campaign. The study and campaign administrative support is approximately 10 to 15 hours per week.

Duties include sending email meeting reminders, correspondence with prospective respondents and the volunteer committees, word processing, creating spreadsheets of committee members and prospective donors, telephone follow up, emailing minutes following short-term committee meetings, coordinating details as required by consultants, managing the donor database and gift acknowledgement. Software and strong interpersonal and communication skills are required. Flexibility, timeliness, respectfulness with volunteers and consultants as well confidentiality pertaining to all donor-entered activities and details is required.

Crescendo would be honored to serve your Feasibility/Campaign Readiness Study and Capital Campaign management needs.

CAMPAIGN FEASIBILITY PROPOSAL

November 2025

Prepared for:



Prepared by:



THE TREK AHEAD

The La Crosse Public Library (LPL) is preparing to evaluate the feasibility of a major fundraising campaign to support Phase Two of its long-term renovation plan, an estimated \$7 million capital project focused on renewing and expanding the Children's and Teen service areas. As the Library transitions from Phase One improvements to a larger and more community-centered initiative, now is the critical moment to determine whether the campaign goals are achievable, the donor base is ready, and the organization is positioned for long-term fundraising success.

Trek Advancement will complete a comprehensive feasibility study that assesses donor capacity, campaign readiness, and philanthropic alignment across the La Crosse community. Our work will provide the Library Board and leadership team with clear, data-supported guidance on:

- Realistic and attainable campaign goals
- Donor appetite and giving capacity
- Organizational readiness for a major campaign
- A recommended timeline, structure, and campaign pathway

The result will be a disciplined, data-informed campaign strategy that reflects the urgency of this moment, honors the Library's mission, and maximizes philanthropic potential. We would be privileged to walk alongside you in this work.

Key Engagement Deliverables

Trek will deliver a comprehensive feasibility study that includes:

- Organizational Readiness Assessment
- Donor & Prospect Analysis
- Local Philanthropic Landscape Review
- 30-40 Confidential Stakeholder Interviews
- Case for Support Testing
- Recommended Campaign Goal & Pacing
- Full Written Feasibility Report
- Presentation to the Library Board of Trustees

Enthusiastically submitted for your consideration,



Brooks A. Scudder, MPA
Founder & President

ABOUT TREK ADVANCEMENT

2025 marks Trek's fifteenth year in business, a significant milestone for our firm that grew out of a desire to bring innovative thinking to the philanthropy consulting practice. We are very proud of the company we are building in pursuit of our aspiration to help non-profits be good receivers of philanthropic investments. To this end, we take a holistic approach to organizational advancement to ensure that our clients achieve sustainable, long-term success. We make certain that our recommendations further the entirety of your organization by promoting solid leadership, good governance practices, sustainable fundraising, and mission-focused action.

We approach our campaign counsel with the philosophy that the undertaking is not just about the money raised – it's about raising stakeholder sights and growing organizational capacity to achieve collective aspirations. Through our practice we have learned that while we bring specific expertise in all areas of development and institutional advancement, at the end of the day, we help organizations navigate change. We also appreciate that "campaign" is just the banner you wrap around sound and sustainable relationship development practices that continue long after the dollar goal is reached.

Over the last fifteen years, we have partnered with over 100 clients. Recent partners include:

- American Saddlebred Museum
- Olmsted Parks Conservancy
- KVC Kentucky
- Grinnell College
- Gatton Park on the Town Branch
- Child Neurology Foundation
- Clark Coalition
- Eastern Kentucky University
- Fayette Alliance / Fayette Alliance Foundation
- University of Kentucky Health Sciences
- National Endowment for Financial Education
- International Association for Dental Research (IADR)
- Louisville Zoo
- Minot State University Foundation
- National Stem Cell Foundation
- Berea College
- Rose Bowl Aquatic Center
- Sayre School
- Sisters of St. Benedict
- Western Resource Advocates
- 21st Century Parks
- University of Indianapolis

PROPOSED APPROACH

Trek will use a structured, proven approach to determine the feasibility of a successful capital campaign for the La Crosse Public Library. Our approach includes:

- Clarity and transparency in methodology, data, and analysis
- Candid, actionable recommendations grounded in donor feedback and real community capacity
- Direct engagement with the Library Board, leadership team, and key partners
- A community-informed process that respects local philanthropic culture
- A focus on long-term system-building, not just immediate campaign readiness

Our feasibility work is designed not only to assess donor appetite but also to position the Library for a strong campaign, clear messaging, and effective leadership engagement.

PROJECT PHASES

Phase 1 - Discovery & Readiness Evaluation

We begin with a full review of the organization's current fundraising systems, governance structure, board engagement, project materials, and long-term capacity.

This phase includes:

- Review of internal documents, architectural concepts, and prior planning
- Assessment of board and staff readiness
- Evaluation of fundraising processes, case materials, and communications
- Identification of gaps or needs prior to campaign launch

Phase 2 — Donor Analysis & Philanthropic Landscape Review

We analyze donor data, giving history, and community philanthropic patterns to understand potential campaign capacity.

This includes:

- Donor segmentation
- Prospect identification
- Review of La Crosse's philanthropic dynamics
- Benchmarking against similar library campaigns

Phase 3 - Stakeholder Interviews & Case Testing

Trek will conduct 30–40 confidential interviews with donors, community leaders, foundation partners, and other key stakeholders.

Interviews explore:

- Perceived strength of the project
- Community appetite for the renovation
- Capacity and willingness to give
- Potential leadership donors
- Concerns or barriers to address
- Messaging resonance and priorities
- Capture the language and stories that most resonate with donors

Phase 4 - Campaign Modeling & Recommendations

Using donor feedback and capacity analysis, we produce:

- Recommended campaign goal (single goal or goal range)
- Leadership gift table
- Recommended staffing and volunteer structure
- Timeline and campaign pacing (quiet, leadership, and public phases)
- Recommended next steps to ensure readiness

Phase 5 - Final Report & Board Presentation

We deliver a full written report summarizing all findings and present the results to the Library Board.

This includes:

- Clear go/no-go recommendation
- Key themes from interviews
- Detailed donor capacity modeling
- Identified risks and mitigation strategies
- Step-by-step campaign roadmap

REFERENCES

As a boutique, founder-operated consulting firm it is important that our clients become partners and in many instances, they end up as lifelong friends and colleagues. Trek has executed comprehensive campaigns across the country in a variety of non-profit sectors including institutions of higher education, community foundations, and healthcare entities. The following lists three Trek clients and corresponding references. We are happy to provide references for any of our clients as requested.

Olmsted Parks Conservancy

Contact: Danielle Archer, Director of Development
Phone: (502) 456-3260
Email: danielle.archer@olmstedparks.org

Since the start of 2025, Trek Advancement has partnered with Olmsted Parks Conservancy to complete a comprehensive fundraising assessment, including donor data analysis, an internal assessment, and a feasibility study for a potential \$30 million Comprehensive capital campaign.

Minot State University Foundation

Contact: Rick Hedberg
Phone: (701) 858-4483
Email: rick.hedberg@minotstateu.edu

Trek Advancement conducted the campaign feasibility study for MSU in August 2019, and served as campaign counsel for MSU's successful \$50 million campaign that concluded in October 2024. Trek consultants have been involved in all aspects of the campaign planning and execution.

International Association for Dental Research

Contact: Sheri Herren
Phone: (703) 548-0066
Email: sherren@iadr.org

Since 2014, Trek has worked with the International Association for Dental Research and its affiliate organization the American Association for Dental, Oral & Craniofacial Research. During that time we have helped both associations implement their first ever fundraising programs from annual fund to major gifts and planned giving.

ASSIGNED TEAM AND EXPERTISE

As you contemplate undertaking the significant effort of a fundraising campaign, it is important to underscore the benefits and burdens of working with outside counsel. As professionals who “have guided clients up the mountain before” our role is best served when we can fully integrate ourselves into the organization to ensure deep understanding and provide applicable advice. With integration comes the burden of having professionals who are focused on making sure you are well positioned for success at all points along the journey. As agents of change, at times we become taskmasters and coaches, driving our clients to continue their ascent when competing priorities may cause distraction.



Brooks Scudder, MPA - Trek Co - Founder & President **Proposed Lead Counsel**

Brooks is the epitome of flexibility. He has been “up the mountain” of capital campaign efforts many times and understands its demands, obstacles and challenges. Unforeseen detours to a plan don’t sidetrack him; he anticipates them. His ability to improvise and overcome ensures our clients remain productive and moving forward. As a coach and consultant Brooks is keenly aware of the needs and desires of others. He is generous with praise, quick to smile, and always on the lookout for the positive in situations.



Jessica Terry Bergman, MA - Trek Co-Founder **Proposed Co-Counsel**

With two decades of experience, Jessica embodies a donor-centered best practice approach. Her experience lies in maximizing results through strategic thinking, embracing the power of individualism, and solving complex challenges. Specializing in major gifts, portfolio development, annual giving, mid-level giving, and stewardship, she thrives on creating tailored solutions for diverse philanthropic needs. Her commitment to fostering strong donor relationships is evident in every aspect of her work. As a seasoned professional she brings passion, precision, and a proven track record to the realm of fundraising, continually seeking innovative ways to drive success and make a lasting difference.

ENGAGEMENT TIMELINE

Trek proposes a six-month timeframe to complete the study. The schedule can be adjusted to meet the Library's internal timeline or preferred pacing.

Deliverables	Timeframe
Discovery, readiness assessment, document review	Months 1 - 2
Donor data analysis, prospect modeling	Months 2 - 3
Stakeholder interviews and case testing	Months 3 - 5
Data synthesis, goal modeling, draft report	Month 5
Final report, recommendations, and Library Board presentation	Month 6

TOTAL INVESTMENT & EXPENSE POLICY

Project Investment

Estimated total investment for service is \$75,000 billed in six monthly installments of \$12,500. Our engagements are project based, with a commitment to deliver all agreed-upon work for a fixed rate. Should the project require more time than anticipated, Trek assumes that responsibility. All engagements include a 60-day termination option and no automatic renewals. Travel time is never billed.

Expenses

Reimbursement for reasonable and necessary expenses incurred during the course of conducting the contracted work is expected under the terms listed above. Qualifying expenses shall include, but are not limited to, all normal business travel including airfare, lodging, ground transportation, parking, mileage and per diem (federal rate), as well as business administrative expenses such as duplicating, postage, office supplies and overnight courier services. A 10% fee will be added to cover administrative and interest expenses incurred. All expenses are pre-approved by you.

ENGAGEMENT PRACTICES

It is Trek's practice to execute formal agreements for all professional engagements, complete with an estimate of professional hours and policies regarding expense reimbursement. Our goal is to communicate clearly in order to meet your expectations. This proposal is valid for 60 days from date of issue.

NEXT STEPS

Flexible to Your Needs

We hope we have accurately addressed your needs for counsel. If not, please let me know so we can be sure to provide you with all the information you may require. We very much look forward to an opportunity to guide the La Crosse Public Library in your mission advancement aspirations. Thank you for your consideration.
