

Petoskey District Library Board of Trustees

**Carnegie Building
451 E. Mitchell St, Petoskey**

Thursday, July 24, 2025, 5:00 p.m.

Call to order

Agenda

Public Comments:

Approval of Minutes: June 26, 2025

Approval of Bills: June 2025

Treasurer's Report on Financial Statements

Reports:

- ◆ Friends of the Petoskey Library
- ◆ Comments/Questions from Township Representatives
- ◆ Director's Report

Board Members' Comments:

Unfinished Business:

New Business:

1. New Job Description
2. Longevity pay proposal
3. Wage Scale proposal
4. Wellness Committee Recommendations
5. Further Discussion of 2026 budget
6. 2025 Budget Amendment Discussion

Public Comments:

Adjournment:

The Petoskey District Library will provide necessary, reasonable aids and services, such as signers for the hearing impaired and audiotapes of printed materials, to individuals with disabilities upon a two-week notice.

PETOSKEY DISTRICT LIBRARY
Board of Trustees Meeting Minutes
June 26, 2025

The meeting was called to order at 5:00 pm by President Kim Block

Present: Kim Block, Ann Ingles, Amy Janssens, Laura Dinon (5:15), Moira Donahoe (student) and Val Meyerson (Library Director)

Absent: Trevor Nelson

Agenda: The agenda was approved by unanimous consent with no changes.

Public Comment: None

Approval of Minutes: The minutes of the regular meeting of May 22, 2025 were approved by unanimous consent.

Approval of Bills: Payment of the May 2025 bills was approved by unanimous consent.

Treasurer's Report on Financial Statements: Kim asked about the fund balance, given the recent expenditures for the new roof. Val stated that the fund balance on the May statement shows \$184,000 and the reserve fund is \$273,000, so it is still in good shape.

Reports:

- Friends of the Library - Karen Cole, a volunteer in the Friends used book store, reported that the Friends are busy prepping for the annual used book sale which is scheduled for July 24 and 25. They have discussed doing ads on Facebook.
- Comments/questions from Township Representatives - Joe Hoffman, representing Bear Creek Township stated that he and Township Supervisor Denny Keiser recently had a good meeting with Val and Kim. He asked about the condition of the main entry doors of the library. Val responded that door maintenance is already on the to-do list.
- Director's Report - Val provided a written report. She is working on a data study of library activity but has not yet seen any trends. The summer reading program is going well, and the kick-off event was extremely well-received. A structural leak in the foundation on the east side of the former Bell building was found and is being addressed. Val is a member of the committee to hire a new MLA executive director.

Board Members' Comments: Kim welcomed Moira Donahoe, our new student board member, to her first official meeting. Amy thanked Val and her staff again for the youth services the library provides, giving her confidence in recommending the library to her students as a safe and inviting place to go.

Unfinished Business: There was no unfinished business.

New Business:

1. The new email communication process for board members was acknowledged as much easier to use than the previous system.
2. General Use Policy - Val decided to leave the Mackinaw library on the list of PAC2 libraries without including the names of its branches.
*Laura moved and Amy seconded to approve the recommended changes to the General Use policy. Motion carried unanimously.
3. Long Overdue Policy - *Laura moved and Kim seconded to approve the Long Overdue policy as presented. Motion carried unanimously
4. Meeting Room Policy - *Amy moved and Laura seconded to approve the Meeting Room policy as updated. Motion carried unanimously
5. Solicitation and Petitions Policy - *Laura moved and Ann seconded to approve the Solicitations and Petitions policy as presented. Motion carried unanimously.

Public Comments: There were no comments from the public.

Adjournment: Kim adjourned the meeting at 5:35 PM.

Note: The July 24th meeting will be held at the Carnegie building and will include a walk-through inspection of the building.

Respectfully submitted,
Ann Ingles, Secretary

Report Criteria:

Report type: GL detail

Check.Type = {<>} "Adjustment"

[Report].Invoice GL Account (3 Characters) = "271","718"

Check Number	Check Issue Date	Payee	Invoice GL Account Title	Amount
108683	06/04/2025	5H Irrigation & Maintenance Inc.	Contracted Services	318.95
108683	06/04/2025	5H Irrigation & Maintenance Inc.	Building Repair & Maintenance	65.00
108901	06/25/2025	Alliance Entertainment	Audio Visual - Adult	211.97
108901	06/25/2025	Alliance Entertainment	Audio Visual - Children	65.79
108901	06/25/2025	Alliance Entertainment	Audio Visual - Adult	282.39
108901	06/25/2025	Alliance Entertainment	Audio Visual - Adult	82.21
108761	06/11/2025	Amazon Capital Services	Books - Adult	186.76
108761	06/11/2025	Amazon Capital Services	Audio Visual - Adult	40.40
108761	06/11/2025	Amazon Capital Services	Programming - Children	14.99-
108761	06/11/2025	Amazon Capital Services	Programming - Children	44.15
108761	06/11/2025	Amazon Capital Services	Programming - Young Adult	94.20
108761	06/11/2025	Amazon Capital Services	Office/Library Supplies	14.29
108761	06/11/2025	Amazon Capital Services	Programming - Young Adult	166.04
108761	06/11/2025	Amazon Capital Services	Books - Adult	125.71-
108761	06/11/2025	Amazon Capital Services	Office/Library Supplies	7.99
108761	06/11/2025	Amazon Capital Services	Programming - Children	91.96
108761	06/11/2025	Amazon Capital Services	Programming - Young Adult	59.40
108761	06/11/2025	Amazon Capital Services	Makerspace - Equip & Supplies	7.99
108761	06/11/2025	Amazon Capital Services	Books - Adult	51.63
108761	06/11/2025	Amazon Capital Services	Audio Visual - Adult	219.70
108761	06/11/2025	Amazon Capital Services	Makerspace - Equip & Supplies	136.38
108761	06/11/2025	Amazon Capital Services	Office/Library Supplies	7.35
108761	06/11/2025	Amazon Capital Services	Building Supplies	17.98
108761	06/11/2025	Amazon Capital Services	Programming - Young Adult	88.97
108761	06/11/2025	Amazon Capital Services	Programming - Children	68.17
108687	06/04/2025	Armstrong, Janet Elaine	Contracted Services	390.00
108763	06/11/2025	Atchison Paper & Supply	Building Supplies	215.75
108902	06/25/2025	Atchison Paper & Supply	Building Supplies	296.40
108764	06/11/2025	Baker & Taylor	Books - Adult	19.84
108903	06/25/2025	Baker & Taylor	Books - Adult	21.60
108903	06/25/2025	Baker & Taylor	Books - Adult	24.65
108903	06/25/2025	Baker & Taylor	Books - Adult	14.40
108903	06/25/2025	Baker & Taylor	Books - Adult	19.20
108903	06/25/2025	Baker & Taylor	Books - Adult	34.80
108903	06/25/2025	Baker & Taylor	Books - Adult	40.80
108903	06/25/2025	Baker & Taylor	Books - Adult	19.97
108903	06/25/2025	Baker & Taylor	Books - Adult	38.40
108903	06/25/2025	Baker & Taylor	Books - Adult	42.16
108903	06/25/2025	Baker & Taylor	Books - Adult	40.92
108691	06/04/2025	Bassett, Susan Jane	Contracted Services	360.00
108770	06/11/2025	Cengage Learning Inc.	Books - Adult	65.58
108770	06/11/2025	Cengage Learning Inc.	Books - Adult	87.97
108771	06/11/2025	Centaris	Contracted Services	417.00
108909	06/25/2025	Center Point Large Print	Books - Adult	57.34
108909	06/25/2025	Center Point Large Print	Books - Adult	29.37
108697	06/04/2025	Cintas Corp #729	Building Supplies	28.55
108697	06/04/2025	Cintas Corp #729	Building Supplies	28.55
108697	06/04/2025	Cintas Corp #729	Building Supplies	28.55
108697	06/04/2025	Cintas Corp #729	Building Supplies	28.55
108699	06/04/2025	City Treas. for Utility Bills	Public Utilities	2,499.33
108699	06/04/2025	City Treas. for Utility Bills	Public Utilities	300.95
108700	06/04/2025	Collias-Glaser, Hellene Kay	Contracted Services	300.00

Check Number	Check Issue Date	Payee	Invoice GL Account Title	Amount
108707	06/04/2025	Ducastel, Barbara	Contracted Services	180.00
108775	06/11/2025	Elevate Technology Partners LLC	Equipment Repair & Maintenance	2,295.00
108776	06/11/2025	Elite Fund Inc.	Contracted Services	71.00
108913	06/25/2025	Evans, Ashley	Periodicals	1,464.69
108709	06/04/2025	Fisher, Amy	Contracted Services	150.00
108849	06/18/2025	GFL Environmental	Contracted Services	145.00
108786	06/11/2025	Haley's Plumbing & Heating	Contracted Services	150.00
108716	06/04/2025	Hammond, Linda Lawless	Contracted Services	180.00
108717	06/04/2025	Hansen, Carol Margaret	Contracted Services	180.00
108721	06/04/2025	Himebauch, Kelly L	Contracted Services	90.00
108787	06/11/2025	Ingram Library Services	Books - Adult	1,910.71
108787	06/11/2025	Ingram Library Services	Books - Young Adult	473.10
108787	06/11/2025	Ingram Library Services	Books-Children's	1,961.36
108923	06/25/2025	Integrity Business Solutions	Office/Library Supplies	41.38
108722	06/04/2025	Jakeway, Patricia	Contracted Services	360.00
108723	06/04/2025	John E. Green Co.	Building Supplies	197.00
108788	06/11/2025	John E. Green Co.	Equipment Repair & Maintenance	1,250.00
108857	06/18/2025	John E. Green Co.	Building Repair & Maintenance	416.80
108857	06/18/2025	John E. Green Co.	Building Repair & Maintenance	197.00
108790	06/11/2025	Keating, Nicole L	Programming - Children	174.00
108859	06/18/2025	Lake, Hilary	Programming - Adult	200.00
108927	06/25/2025	Lakeshore Learning	Programming - Children	35.58
108927	06/25/2025	Lakeshore Learning	Programming - Children	3.43
108793	06/11/2025	MARCO LLC	Contracted Services	26.00
108934	06/25/2025	Metropolitan Life Insurance Company	Fringe Benefits	395.98
108795	06/11/2025	Meyer Ace Hardware	Building Supplies	16.17
108795	06/11/2025	Meyer Ace Hardware	Building Supplies	35.99
108797	06/11/2025	Michigan Library Association	Memberships & Dues	347.09
108758	06/09/2025	MICHIGAN MUNICIPAL LEAGUE WC FUND	Fringe Benefits	857.73
108758	06/09/2025	MICHIGAN MUNICIPAL LEAGUE WC FUND	Fringe Benefits	770.04
108937	06/25/2025	MIDWEST COLLABORATIVE	Memberships & Dues	125.00
108725	06/04/2025	Midwest Tape LLC	Audio Visual - Adult	37.72
108725	06/04/2025	Midwest Tape LLC	Audio Visual - Adult	55.99
108725	06/04/2025	Midwest Tape LLC	Audio Visual - Adult	62.96
108725	06/04/2025	Midwest Tape LLC	Audio Visual - Adult	55.99
108938	06/25/2025	Midwest Tape LLC	Audio Visual - Adult	24.73
108938	06/25/2025	Midwest Tape LLC	Audio Visual - Adult	71.97
108938	06/25/2025	Midwest Tape LLC	Audio Visual - Adult	294.93
108727	06/04/2025	Mindel, Julie	Contracted Services	150.00
108867	06/18/2025	Mitchell Graphics Inc.	Printing/Advertising/Postage	101.40
108867	06/18/2025	Mitchell Graphics Inc.	Printing/Advertising/Postage	171.00
108867	06/18/2025	Mitchell Graphics Inc.	Printing/Advertising/Postage	4,141.23
108868	06/18/2025	MOTION PICTURE LICENSING CORP.	Programming - Adult	304.63
108731	06/04/2025	Northern Gale Cleaning & Property Mgmt	Contracted Services	1,350.00
108871	06/18/2025	Northern Gale Cleaning & Property Mgmt	Contracted Services	1,500.00
108942	06/25/2025	OneAmerica	Fringe Benefits	86.00
108733	06/04/2025	Otis Elevator Co.	Building Repair & Maintenance	125.00
108733	06/04/2025	Otis Elevator Co.	Building Repair & Maintenance	125.00
108873	06/18/2025	Overdrive Inc.	Electronic Materials	7,000.00
108875	06/18/2025	Peninsula Fiber Network LLC	Communications	89.10
108876	06/18/2025	Petersen, Elisabeth	Programming - Adult	180.00
108946	06/25/2025	Priority Health	Fringe Benefits	8,466.88
108808	06/11/2025	Pro Image Design	Office/Library Supplies	335.43
108812	06/11/2025	Scholastic Inc.	Books-Children's	35.00
108885	06/18/2025	Smith, Christine R.	Programming - Adult	170.00
108950	06/25/2025	STURGEON RIVER POTTERY	Programming - Children	356.51
108818	06/11/2025	T-Mobile	Communications	283.19

Check Number	Check Issue Date	Payee	Invoice GL Account Title	Amount
108893	06/18/2025	Trophy Case, The	Office/Library Supplies	8.00
108893	06/18/2025	Trophy Case, The	Office/Library Supplies	18.00
108893	06/18/2025	Trophy Case, The	Office/Library Supplies	9.00
108958	06/25/2025	UNITED STATES POSTAL SERVICE	Printing/Advertising/Postage	455.30
108960	06/25/2025	Van's Business Machines	Equipment Repair & Maintenance	246.95
Grand Totals:				48,651.56

Summary by General Ledger Account Number

GL Account	Debit	Credit	Proof
271-000-202.000	140.70	48,792.26-	48,651.56-
271-790-724.000	10,576.63	.00	10,576.63
271-790-751.000	441.44	.00	441.44
271-790-752.000	893.49	.00	893.49
271-790-760.000	2,706.10	125.71-	2,580.39
271-790-760.100	1,996.36	.00	1,996.36
271-790-760.200	473.10	.00	473.10
271-790-760.400	1,464.69	.00	1,464.69
271-790-761.000	1,440.96	.00	1,440.96
271-790-761.100	65.79	.00	65.79
271-790-762.000	7,000.00	.00	7,000.00
271-790-802.000	6,317.95	.00	6,317.95
271-790-850.000	372.29	.00	372.29
271-790-905.000	4,868.93	.00	4,868.93
271-790-915.000	472.09	.00	472.09
271-790-920.000	2,800.28	.00	2,800.28
271-790-930.000	928.80	.00	928.80
271-790-931.000	3,791.95	.00	3,791.95
271-790-958.000	773.80	14.99-	758.81
271-790-958.100	854.63	.00	854.63
271-790-958.200	408.61	.00	408.61
271-790-964.000	144.37	.00	144.37
Grand Totals:	48,932.96	48,932.96-	.00

Report Criteria:

Report type: GL detail

Check.Type = {<>} "Adjustment"

[Report].Invoice GL Account (3 Characters) = "271","718"

Report Criteria:
Check.Detail.GL account (3 Characters) = "271,718"
Check.Created date = 06/01/2025-06/30/2025

Check Number	Check Issue Date	Name	GL Account	Amount
108962	06/25/2025	Central Lake District Library	271790955000	27.00
Grand Totals:				27.00

CITY OF PETOSKEY
DETAIL REVENUES WITH COMPARISON TO BUDGET
FOR THE 6 MONTHS ENDING JUNE 30, 2025

FUND 271 - LIBRARY FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET AMOUNT	VARIANCE	% OF BUDGET
	<u>OPERATING REVENUE</u>					
271-081-402.000	STATE AID	.00	9,331.36	18,500.00	(9,168.64)	50.44
271-081-403.000	CURRENT PROPERTY TAX	.00	.00	1,056,100.00	(1,056,100.00)	.00
271-081-405.000	PROPERTY TAX - BEAR CREEK	30.45	252,075.42	253,900.00	(1,824.58)	99.28
271-081-407.000	PROPERTY TAX - RESORT	.00	200,806.37	207,200.00	(6,393.63)	96.91
271-081-409.000	PROPERTY TAX - LITTLE TRAVERSE	.00	165,273.38	166,400.00	(1,126.62)	99.32
271-081-411.000	PROPERTY TAX - SPRINGVALE	.00	59,376.94	58,000.00	1,376.94	102.37
271-081-445.000	PENALTIES & INTEREST	.00	2,155.50	3,000.00	(844.50)	71.85
271-081-566.000	GRANTS	.00	46,452.00	22,800.00	23,652.00	203.74
271-081-657.000	PENAL FINES	.00	.00	60,000.00	(60,000.00)	.00
271-081-658.000	REIMBURSEMENTS	1,119.74	3,740.61	6,500.00	(2,759.39)	57.55
271-081-687.000	PAID CARDS	385.00	2,155.00	3,000.00	(845.00)	71.83
271-081-692.000	COPIES	236.10	3,329.45	4,000.00	(670.55)	83.24
271-081-694.000	BOOK SALE	1,592.84	6,405.85	12,000.00	(5,594.15)	53.38
271-081-695.000	CONTRACTED WAGES	.00	9,636.00	12,000.00	(2,364.00)	80.30
271-081-696.000	MERCHANDISE SALES	203.00	1,191.95	500.00	691.95	238.39
	TOTAL OPERATING REVENUE	3,567.13	761,929.83	1,883,900.00	(1,121,970.17)	40.44
	<u>NON-OPERATING REVENUE</u>					
271-082-664.000	INTEREST INCOME	1,019.70	5,485.15	12,000.00	(6,514.85)	45.71
271-082-682.000	OTHER	853.90	2,860.57	4,000.00	(1,139.43)	71.51
271-082-684.000	BUILDING RENT	2,062.50	5,912.50	8,000.00	(2,087.50)	73.91
271-082-696.000	DONATIONS	1,471.40	6,872.50	40,000.00	(33,127.50)	17.18
	TOTAL NON-OPERATING REVENUE	5,407.50	21,130.72	64,000.00	(42,869.28)	33.02
	TOTAL FUND REVENUE	8,974.63	783,060.55	1,947,900.00	(1,164,839.45)	40.20

CITY OF PETOSKEY
DETAIL EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 6 MONTHS ENDING JUNE 30, 2025

FUND 271 - LIBRARY FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET AMOUNT	VARIANCE	% OF BUDGET
<u>LIBRARY</u>					
271-790-702.000 SALARIES & WAGES - FULL-TIME	37,574.00	240,387.36	498,500.00	258,112.64	48.22
271-790-704.000 SALARIES & WAGES - PART-TIME	18,300.99	116,723.01	264,100.00	147,376.99	44.20
271-790-724.000 FRINGE BENEFITS	28,163.94	130,099.15	236,400.00	106,300.85	55.03
271-790-751.000 OFFICE/LIBRARY SUPPLIES	441.44	4,975.30	10,000.00	5,024.70	49.75
271-790-752.000 BUILDING SUPPLIES	893.49	4,775.45	7,000.00	2,224.55	68.22
271-790-760.000 BOOKS - ADULT	2,580.39	17,011.80	45,000.00	27,988.20	37.80
271-790-760.100 BOOKS-CHILDREN'S	1,996.36	10,297.17	25,000.00	14,702.83	41.19
271-790-760.200 BOOKS - YOUNG ADULT	473.10	1,882.65	5,500.00	3,617.35	34.23
271-790-760.400 PERIODICALS	1,464.69	1,727.69	9,000.00	7,272.31	19.20
271-790-761.000 AUDIO VISUAL - ADULT	1,440.96	3,979.00	11,000.00	7,021.00	36.17
271-790-761.100 AUDIO VISUAL - CHILDREN	65.79	459.68	1,500.00	1,040.32	30.65
271-790-761.200 AUDIO VISUAL - YOUNG ADULT	.00	270.35	600.00	329.65	45.06
271-790-762.000 ELECTRONIC MATERIALS	7,000.00	43,188.77	51,500.00	8,311.23	83.86
271-790-762.100 DATA BASES	.00	1,625.20	7,000.00	5,374.80	23.22
271-790-801.000 PROFESSIONAL SERVICES	.00	1,929.67	3,000.00	1,070.33	64.32
271-790-802.000 CONTRACTED SERVICES	6,317.95	59,841.05	124,700.00	64,858.95	47.99
271-790-850.000 COMMUNICATIONS	372.29	3,060.30	8,100.00	5,039.70	37.78
271-790-880.000 COMMUNITY OUTREACH	.00	832.00	3,000.00	2,168.00	27.73
271-790-885.000 DONATION EXPENSE	.00	1.00	3,000.00	2,999.00	.03
271-790-887.000 BANK CHARGES	108.14	407.09	500.00	92.91	81.42
271-790-905.000 PRINTING/ADVERTISING/POSTAGE	5,068.93	21,353.86	45,000.00	23,646.14	47.45
271-790-912.000 TRAINING & TRAVEL	.00	3,282.10	11,000.00	7,717.90	29.84
271-790-915.000 MEMBERSHIPS & DUES	472.09	822.09	2,400.00	1,577.91	34.25
271-790-920.000 PUBLIC UTILITIES	2,800.28	13,668.76	32,000.00	18,331.24	42.71
271-790-924.000 HEATING FUEL	.00	11,847.92	17,500.00	5,652.08	67.70
271-790-930.000 BUILDING REPAIR & MAINTENANCE	928.80	20,339.16	55,000.00	34,660.84	36.98
271-790-931.000 EQUIPMENT REPAIR & MAINTENANCE	3,791.95	4,629.34	10,400.00	5,770.66	44.51
271-790-937.000 INSURANCE & BONDS	.00	12,097.44	12,000.00	(97.44)	100.81
271-790-955.000 MISCELLANEOUS	27.00	1,648.54	3,000.00	1,351.46	54.95
271-790-958.000 PROGRAMMING - CHILDREN	758.81	4,262.54	8,500.00	4,237.46	50.15
271-790-958.100 PROGRAMMING - ADULT	1,114.33	5,892.87	15,000.00	9,107.13	39.29
271-790-958.200 PROGRAMMING - YOUNG ADULT	548.50	2,061.06	2,500.00	438.94	82.44
271-790-964.000 MAKERSPACE - EQUIP & SUPPLIES	144.37	1,526.45	3,500.00	1,973.55	43.61
271-790-970.000 CAPITAL OUTLAY	.00	90,454.66	45,000.00	(45,454.66)	201.01
271-790-985.000 EQUIPMENT	.00	.00	5,000.00	5,000.00	.00
271-790-986.000 TECH. EQUIPMENT & SOFTWARE	1,299.98	3,972.49	32,500.00	28,527.51	12.22
271-790-995.000 ADMINISTRATIVE FEES	7,200.00	7,200.00	7,200.00	.00	100.00
TOTAL LIBRARY	131,348.57	848,532.97	1,621,900.00	773,367.03	52.32

CITY OF PETOSKEY
 DETAIL EXPENDITURES WITH COMPARISON TO BUDGET
 FOR THE 6 MONTHS ENDING JUNE 30, 2025

FUND 271 - LIBRARY FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET AMOUNT	VARIANCE	% OF BUDGET
	<u>BOND DEBT REQUIREMENT</u>					
271-792-991.000	PRINCIPAL PAYMENT	.00	.00	255,000.00	255,000.00	.00
271-792-992.000	INTEREST PAYMENT	.00	6,036.70	12,100.00	6,063.30	49.89
271-792-993.000	PAYING AGENT FEES	.00	.00	300.00	300.00	.00
	TOTAL BOND DEBT REQUIREMENT	.00	6,036.70	267,400.00	261,363.30	2.26
	TOTAL FUND EXPENDITURES	131,348.57	854,569.67	1,889,300.00	1,034,730.33	45.23
	NET REVENUES OVER EXPENDITURES	(122,373.94)	(71,509.12)	58,600.00	(130,109.12)	(122.03)

CITY OF PETOSKEY

BALANCE SHEET
JUNE 30, 2025

FUND 271 - LIBRARY FUND

ASSETS

271-000-001.000	CASH	(120.16)	
271-000-001.700	CASH - FIFTH THIRD LIBRARY		400,377.95	
271-010-004.000	WORKING FUND - LIBRARY		175.00	
271-010-020.000	TAXES RECEIVABLE - CURRENT		1,807.68	
271-010-026.000	TAXES RECEIVABLE - DELINQUENT		5,793.16	
TOTAL ASSETS				408,033.63

LIABILITIES AND EQUITY

LIABILITIES

271-040-253.000	ACCRUED INTEREST		3,018.00	
271-040-261.000	ACCRUED PAID TIME OFF		15,433.26	
271-040-292.001	DEFERRED G/L ON REFUNDING	(2,733.00)	
TOTAL LIABILITIES				15,718.26

FUND EQUITY

271-000-390.000	FUND BALANCE		190,824.49	
271-000-395.000	FUND BALANCE - RESERVED		273,000.00	
	REVENUE OVER EXPENDITURES - YTD	(71,509.12)	
TOTAL FUND EQUITY				392,315.37
TOTAL LIABILITIES AND EQUITY				408,033.63

Petoskey District Library

Director's Report: July 2025

Strategic Planning

- Hold wait times on in-house materials have seen a great improvement since January. Items that are available on the same day the hold is placed, went from 15% to 20%. Items that are available within the first week went from 82% to 86%. Mary is doing a great job. Hopefully we will continue to see improvements on these wait times.
- I am just gathering statistics on Hold Wait times for the digital collection. The first look shows a small reduction in Q2 hold wait times compared to the last 12 months. Holds filled the first day went from 3.3% to 3% and holds filled within the first week went from 29.1% to 28.1%. Small progress is nice to see.
- Staff Wellness Committee is hard at work matching up people together with activities they like to do.
- Patron Usage Study is complete. While we didn't learn anything earth shattering, we did have quite a few things confirmed. We will be pondering ways in which we can best meet the needs of the patrons with the most efficient use of our staff dollars. A few items to take note:
 - More teens visit at the beginning of the week
 - Computers and the pre-school area are the most regularly visited
 - The Periodical Room and the table at the top of the stairs, under the window are also regularly used
 - Morning is busier than evening
 - The main floor is the busiest floor, but the second floor is busiest on Sundays

Val's Update:

- The last annual report presentation at Bear Creek Township went well.
- Staff have begun their training sessions on WebJunction or Niche Academy.
- We have two volunteers that will be "Mystery Patrons" to review the flow, signage, and services in the library. We are currently working on their questions and hopefully get them scheduled in the next month or so.
- The City of Petoskey applied for and was awarded an EGLE grant to do a Level II Assessment of the Carnegie Building. The hope is that this will lead to other granting opportunities for the building. What the deliverables are include: 1. a Level II Assessment of the whole building (energy efficiency) and 2. strategy to fixing the windows and hopefully enough funds to actually fix one or two. We will have a project kick off meeting the end of the month. The consulting agreement is attached.

Circulation Department

- You will find the UMS monthly report attached. As you can see, we are still benefiting from this partnership with an 11:1 return on investment (ROI). See attached report.
- There is a new GIS map available for the circulation staff to verify home libraries for new patrons. It is searchable by address and will then pinpoint the home library. A great tool for us. We used to have to make a few calls to verify.

- The online library card applications and renewal have been a big hit. Emma is doing close to half of our cards and renewals this way.

Children's Department

- Summer Reading Program numbers seem to be down. We are still in discussion mode to see if we can figure out why. Program attendance is OK.
- We offered a new Sensory Story Time program which has been well received.
- Megan attended the UP History Conference this year. You will find her report attached.

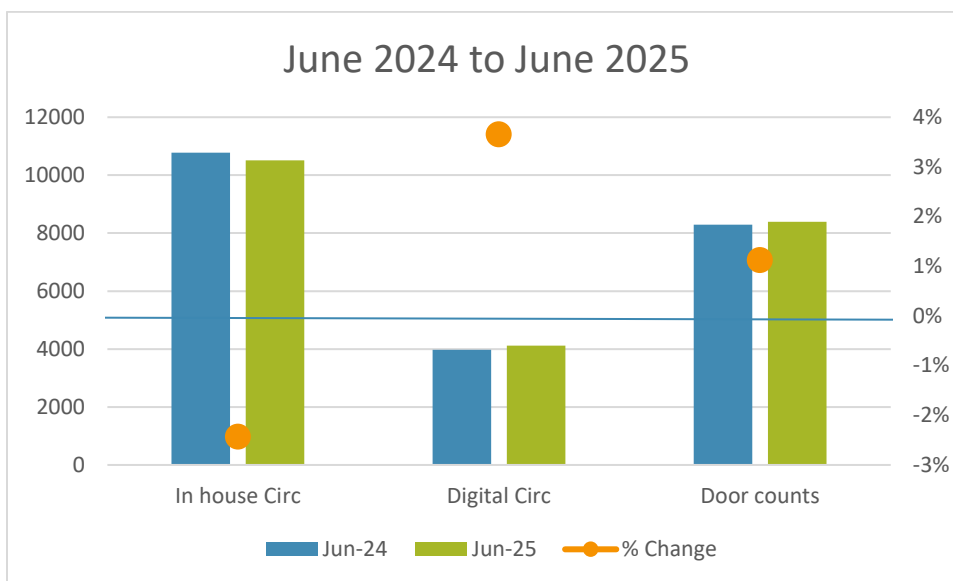
Facility

We have a solution for the seam issue in the courtyard between the library and the AT&T building. Nathan, from NBMV, will remove the old seam, and patch the connection point from the courtyard to our building. We are in test mode, checking for any moisture issues at this point. It looks as if we are dry...

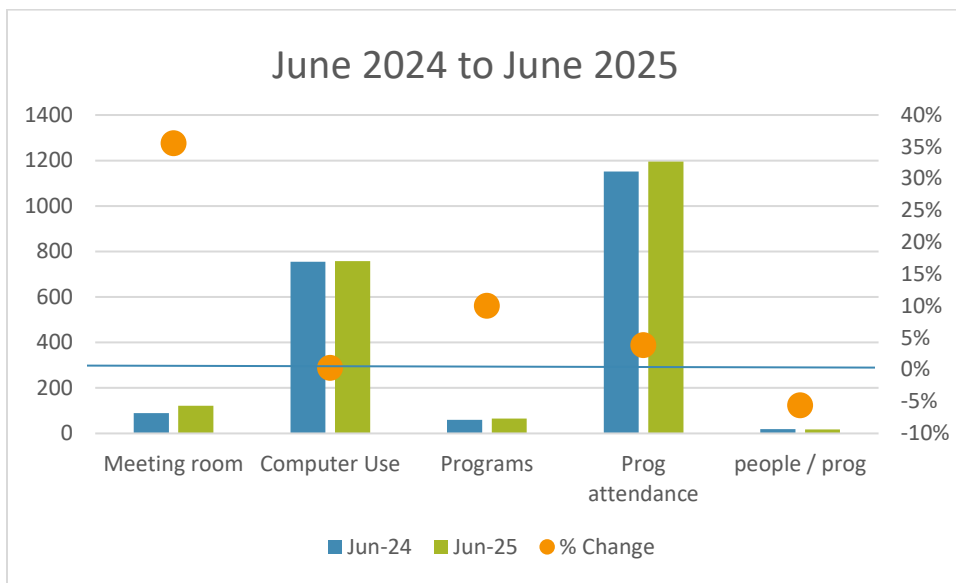
But, we found another leak spot due to HVAC blower burn out creating a condensation issue. This created a leak in the second floor, damaging the ceiling drywall.

There are enough repairs at this point that we will be filing an insurance claim to cover the drywall, HVAC and concrete repairs. The repairs will entail repairing drywall in the three public service desk offices. This means those offices will be vacated for the a 2-3 week period while they demo and repair. We are looking a September schedule.

Statistics



Following our current trend, in-house circulation is down and digital circulation is up, closely balancing each other out.



Meeting room use was way up. Programs were up, but the average number of people per program was down.



AGREEMENT FOR CONSULTING SERVICES

THIS AGREEMENT is made and entered into by and between ENERGY SCIENCES RESOURCE PARTNERS, LLC, a Michigan limited liability company, of Berkley, Michigan ("Energy Sciences") and The City of Petoskey, of Petoskey, MI., ("Customer").

WITNESSETH:

WHEREAS, Energy Sciences is an energy consulting firm that identifies and provides practical energy solutions through energy audits, comprehensive energy management programs and turnkey projects; and

WHEREAS, Customer desires to engage Energy Sciences' energy consulting services as more particularly described in the attached proposal, Proposal for Consulting Services for Michigan Department of Environment, Great Lakes, and Energy (EGLE) Community Energy Management Grant (CEM) Project, (Exhibit A) dated 11/22/2024 (the "Proposal"), which is attached hereto and expressly made a part hereof.

NOW, THEREFORE, Customer and Energy Sciences, in consideration of the mutual covenants and agreements herein contained, do mutually agree as follows:

1. Application Submission Package. Effective upon execution of this Agreement by both parties, Energy Sciences shall at no cost to Customer prepare an application submission package for a Michigan Department of Environment Great Lakes and Energy (EGLE) Community Energy Management (CEM) Grant which includes:

- A Word document, which can be used as a guide to complete the application—specifically focused on the project to be completed
- Formal Scope of Work and guidance on supporting documents to submit with the online application
- Assistance with the budget template for all contractual-related work proposed

Customer shall submit the CEM grant application to EGLE.

In the event the EGLE awards the CEM Grant to Customer, Customer agrees that Energy Sciences shall be the sole contractor for the project outlined in the CEM Grant pursuant to the terms stated below.



2. **Effective Date of Project.** The rights and obligations of the parties for the services to be performed for the project shall be effective as of the date that EGLE awards the CEM Grant to Customer.
3. **Services.** Energy Sciences agrees to perform professional energy consulting services as described in the Proposal.
4. **Performance of Services.** Energy Sciences shall assure that all the work is accomplished in a workmanlike manner and that all services which require the exercise of professional skills or judgment shall be accomplished by professionals qualified and competent in the applicable discipline. All documents that are required to be prepared by Energy Sciences shall be in accord with all applicable codes, standards, and regulations and shall be prepared by qualified personnel unless otherwise noted in the Proposal.
5. **Completion Date.** Energy Sciences agrees to complete the services called for in the Proposal within 365 calendar days after the effective date.
6. **Consideration for Services.** For and in consideration of the services rendered by Energy Sciences Customer shall pay to Energy Sciences from funds received from the EGLE CEM Grant \$100,000.00 including reasonable reimbursable expenses if incurred. The fee schedule, payment terms and conditions are outlined in the accompanying Proposal, Exhibit A.
7. **Access to Information and Facilities.** Customer shall furnish access to Customer's facility and such available records and data for customer's facility as Energy Sciences shall reasonably require in order to provide the services specified in the Proposal. The Customer also shall provide copies of drawings, equipment logs, maintenance work orders of Customer and any other information requested in the Proposal as Energy Sciences shall reasonably require, insofar as this information is readily available. Energy Sciences shall use all information, records and documents received with respect to Customer's facility solely for purposes of the energy consulting services pursuant to this Agreement as described in the Proposal.
8. **Termination.** Customer may terminate this Agreement at any time by providing ten (10) days written notice to Energy Sciences. Upon receipt of such notice, Energy Sciences shall discontinue all services in connection with the performance of this Agreement and shall proceed to cancel promptly all existing orders and contracts insofar as such orders or contracts are chargeable to this Agreement. Within thirty (30) days after receipt of notice of termination, Energy



Sciences shall submit a statement, showing in detail the services performed under this Agreement to the date of termination. The Customer shall then pay Energy Sciences that proportion of the prescribed charges which the services performed under this Agreement bear to the total services called for under this Agreement, less such payments on account of charges as have been previously made.

9. **Independent Contractor.** Energy Sciences' status under this Agreement is that of an independent contractor. Energy Sciences shall not be deemed an employee, agent, partner or joint venture of Customer for any purpose whatsoever, and Energy Sciences shall have no authority to bind or act on behalf of Customer. Energy Sciences shall be responsible for, and agrees to comply with, obligations under federal and state tax laws for payment of income, business and, if applicable, -employment taxes.

10. **Confidentiality.**

- a. For the purpose of this Section, the party disclosing confidential information shall be called the "Disclosing Party" and the party receiving the confidential information shall be called the "Recipient".
- b. The term "Confidential Information" shall mean any oral or written information disclosed by the Disclosing Party to the Recipient relating to information which is not generally known to the public, including, but not limited to, information relating to business and technical plans.
 - i. Confidential Information includes, by way of example and not limitation, information of a technical nature such as trade secrets: devices or manufacturing processes: techniques, data, formulas, inventions (whether or not patentable), specifications and characteristics of current products or products under development: research subjects, methods and results: matters of a business nature such as information about costs, margins, pricing policies, markets, sales, suppliers and customers: product, marketing or strategic plans: financial information and any third-party confidential information included with, or incorporated in, any of the foregoing and other information of a similar nature.
 - ii. Confidential Information does not include information that (a) is in or becomes in the public domain without violating this Agreement; (b) is known to the recipient prior to disclosure, as shown by written records; or (c) is received by the Recipient from a third party having



no obligation of confidentiality to the Disclosing Party.

- iii. If the Recipient is required by judicial or administrative process to disclose any Confidential Information, the Recipient shall promptly notify the Disclosing Party of such Demand, so that the Disclosing Party may seek an appropriate protective order. Recipient shall disclose only such portion of the Confidential Information as it is legally compelled to disclose.
- c. Subject to Customer's legal obligations to follow the provisions of the Freedom of Information Act MCL 15.231, et. Seq., the Recipient agrees that:
 - i. Confidential Information shall be used for internal purposes only and shall not disclose the information to anyone other than its employees and independent contractors who have a need to know;
 - ii. Confidential Information shall be used by the Recipient only for the benefit of the Disclosing Party; and
 - iii. Confidential Information shall remain the property of the Disclosing Party. Upon request, Confidential Information shall be returned to the Disclosing Party; provided that any summaries, memorandum, restatements, other materials or other work product that contain Confidential Information of both the Disclosing Party and the Recipient shall be destroyed by the Recipient and Confidential Information in digital or machine readable form shall be destroyed by Recipient (other than copies in backups maintained solely for disaster recovery purposes).
 - iv. Each Party agrees that it will treat the Confidential Information in the same manner as it treats like information of its own, but in all events it shall exercise at least a commercially reasonable standard of care to prevent unauthorized disclosures of the Confidential Information.

11. Indemnification

- a. Customer shall indemnify, defend, and hold Energy Sciences harmless from and against all claims, losses, expenses, liabilities, demands, obligations, or damages of every kind and nature (including, without



limitation, reasonable attorney fees and expenses) (Losses), arising out of the willful acts and/or negligence of Customer's employees.

- b. Energy Sciences shall indemnify, defend, and hold Customer, its officers, directors, members, employees, agents, and other representatives harmless from and against all Losses arising out of or related to (i) any act or omission of the Energy Sciences or (ii) any breach of the Agreement by Energy Sciences.

12. **Insurance.** Energy Sciences shall maintain throughout the Term of the Agreement insurance from a company satisfactory to Customer as follows:

- a. Michigan statutory worker's compensation insurance;
- b. Employer's liability insurance with a minimum limit of coverage of One Million (\$1,000,000) Dollars;
- c. Automobile insurance coverage on the vehicle(s) Subcontractor and/or its employees use in the course of the performance of Services to the Company under the Agreement, if applicable, with a minimum limit of coverage of One Million (\$1,000,000) Dollars; and
- d. Commercial general liability insurance covering bodily injury, personal injury, property damage, premises operations, completed operations, and contractual liability, with a minimum limit of coverage of One Million \$1,000,000 Dollars.

13. **Notice.** Any notice required or permitted to be given under the Agreement must be in writing and may be delivered in person, by certified or registered mail, return receipt requested, facsimile, or by overnight courier addressed to the respective party at the address set forth below. Any notice will be considered to have been given when personally delivered or five business days after the date of mailing or one business day after the date of forwarding if sent by facsimile or overnight courier. Unless otherwise provided in this Agreement, all notices shall be delivered to the following addresses:

If to Energy Sciences:

Energy Science Resource Partners, L.L.C.
Attn: Shelley Sullivan
3500 W. 11 Mile Rd, Suite B Berkley, MI 48072



If to Customer:

City of Petoskey
Attn: Shane Horn
101 E Lake St.
Petoskey, MI 49770

Either party may designate a different address by giving the other party ten (10) days written notice.

14. **Warranties.** Energy Sciences represents and warrants that the Services shall be performed in a professional and workmanlike manner, conforming to generally accepted industry practices. Energy Sciences warrants and represents that to its knowledge the Services and any other information or deliverables provided to Customer under this Agreement will not infringe or misappropriate any third party's rights, including any intellectual property rights and/or trademark rights (hereinafter "Third-party Rights").

EXCEPT AS EXPLICITLY SET FORTH HEREIN, ENERGY SCIENCES DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, WITH RESPECT TO SERVICES PERFORMED UNDER THIS AGREEMENT, INCLUDING, WITHOUT LIMITATION, ANY AND ALL IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, COMPLETENESS, ACCURACY, QUALITY, PERFORMANCE, VALIDITY AND NONINFRINGEMENT. IN NO EVENT SHALL EITHER PARTY TO THIS AGREEMENT BE LIABLE TO THE OTHER FOR SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES, EVEN IF INFORMED OF THE POSSIBILITY THEREOF IN ADVANCE.

15. **Entire Agreement; Modifications.** This instrument contains the entire Agreement between the parties relating to the rights herein granted and obligations herein assumed. Any oral or written representations or modifications concerning this instrument shall be of no force and effect excepting a subsequent written modification signed by both parties hereto.
16. **Limitations on Obligations.** By entering into this Agreement, the parties do not intend to create any obligations, express or implied, other than those specifically set out in this Agreement. Nothing in this Agreement shall create any rights or obligations in any party who is not a signatory to this Agreement.



17. **Compliance with Applicable Law.** In performance of its obligations pursuant to this Agreement, Energy Sciences shall comply with all applicable provisions of federal, state, and local law.

18. **Waivers.** The failure of either party to require the performance of any term or obligation of this Agreement, or the waiver by either party of any breach of this Agreement, shall not prevent any subsequent enforcement of any term or obligation or be deemed a waiver of any subsequent breach.

19. **Assignment.** This Agreement may not be assigned by either party without the prior written consent of the other party.

20. **Billing.** Customer Billing Information:

Billing Contact Name: Shane Horn
Legal Company Name: City of Petoskey
Billing phone: 231-347-2500 ext. 1111
Billing Address: 101 E Lake St., Petoskey, MI 49770

Any other information required for invoice (P.O.#, job #, etc.): _____

21. **Governing Law.** The Agreement is a contract made under and shall be governed by and construed in accordance with, the laws of the State of Michigan without giving effect to its choice-of-law principles. The parties agree that any legal or equitable action or proceeding with respect to the Agreement or the transactions contemplated by it shall be brought only in any court sitting in Oakland County of the State of Michigan, or the Eastern District Court of the United States sitting in Michigan, and each of the parties submits to and accepts generally and unconditionally the exclusive jurisdiction of those courts with respect to it and its property and irrevocably consents to the service of process in connection with any action or proceeding by personal delivery or by the mailing by registered or certified mail, postage prepaid to its address first set forth above. Nothing in the Agreement shall affect the right of any party to serve process in any other manner permitted by law. Each party irrevocably waives any objection to the laying of venue of any action or proceeding in the above-described courts.

22. **Attorney Fees.** If any litigation, or other legal proceeding occurs between the Parties relating to this Agreement, the prevailing Party shall be entitled to recover (in addition to any other relief award or granted) its reasonable costs and



expenses, including attorney's fees incurred in the proceeding.

23. **Severability.** If any provision of this Agreement is held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable. If a court of competent jurisdiction finds that any provision is invalid and unenforceable as written, that provision will be deemed modified in a manner consistent with the intent of the original provision, so as to make it valid and enforceable. This Agreement, and the application of the provision to persons or circumstances other than those with respect to which it would be invalid or unenforceable, shall not be affected.

24. **Counterparts; Facsimile.** This Agreement may be executed in one or more counterparts, each of which shall be deemed to be an original, but all of which together shall constitute one and the same instrument. This Agreement may be executed and delivered by facsimile or electronic transmission, and a facsimile or electronic version of the Agreement or of a signature of a party will be effective as an original.

ENERGY SCIENCES RESOURCE PARTNERS, LLC

SIGNED: DocuSigned by:

AFC9AB72F7AC48E...

PRINT: Shelley Sullivan

DATE: 12/6/2024

CUSTOMER: City of Petoskey

SIGNED: Signed by:

7AA668CB767E4BD...

PRINT: Shane Horn

DATE: 12/6/2024



Updated: December, 2024

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Exhibit A. Proposal



3500 W. 11 Mile Road, Suite B
Berkley, MI 48072
P: 248.792.9287
www.energysciencesllc.com

Proposal for Consulting Services for Michigan Department of Environment, Great Lakes, and Energy (EGLE) Community Energy Management Grant (CEM) Project

The City of Petoskey and Downtown Petoskey

November 22, 2024

Submitted To:

Shane Horn
The City of Petoskey
101 E Lake St
Petoskey, MI 49770
Ph: (231) 347-2500

Amy Tweeten
Downtown Petoskey
409A E Lake St
Petoskey, MI 49770
Ph: (231) 622-8501

Submitted By:

Energy Sciences Resource
Partners LLC
3500 West 11 Mile Rd, Suite B
Berkley, MI 48072

Michelle Peters
michelle.peters@esiences.us
Mobile: (734) 365-1155

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Introduction/Summary

Energy Sciences recognizes the City of Petoskey’s commitment to sustainability, as outlined in the Livable Petoskey Master Plan, and that the City has made significant accomplishments towards achieving this plan to date. We are excited about the prospect of assisting the City with the development of a project that aligns with the objectives of the Master Plan to apply for the Michigan Department of Environment, Great Lakes, and Energy (EGLE) Community Energy Management (CEM) Grant. Our work with local governments is firmly based on the belief that sustainability isn't just a dream for a select few, but a future every community deserves.

Founded in 2008, Energy Sciences has become a trusted partner for clients seeking customized consulting services to enhance energy efficiency and decarbonize operations, supporting their efforts to build more resilient communities and operations. As a certified Women's Business Enterprise headquartered in Berkley, Michigan, Energy Sciences' mission is to provide our services with the utmost integrity, implement sustainable practices, and be socially responsible for the benefit of our clients, the environment, and all living things.

Our team of degreed and licensed engineers, scientists, certified energy auditors, energy managers, sustainable development professionals, and marketing and outreach specialists offers a wealth of practical knowledge in applying effective strategies for establishing focus areas, creating baselines, setting goals, and formulating action steps to improve quality of life by reducing pollution, conserving natural resources, promoting economic resilience, and fostering healthier, greener communities for current and future generations.

The Energy Sciences team consists of persons holding the following certifications and/or licenses:

- | | |
|---|---|
| • Professional Engineer | • Certified Sustainable Development Professional |
| • Project Management Professional | • Certified Lighting Efficiency Professional |
| • Certified Energy Manager | • Leadership in Energy and Environmental Design Accredited Professional |
| • Certified Energy Auditor | • Certified Demand-side Manager |
| • Existing Building Commissioning Professional | |
| • Certified Measurement & Verification Professional | |

To our team, sustainability is a commitment to making decisions and taking actions that benefit all people and protect the environment. This commitment has guided us in providing various services and completing projects for various municipal and corporate clients.

We partner with local governments to guide them through securing federal and state funding through grant applications. This includes everything from defining and structuring impactful

projects to completing the application process and developing key components, like a Community Benefits Plan (CBP) and an Environmental Sustainability Plan. In addition to providing technical and engineering expertise, we bring extensive communications and outreach capabilities to the table, ensuring that engagement strategies are customized to meet the distinct needs of each community. Our comprehensive support helps local governments secure funding and align projects with broader environmental and social objectives.

Additionally, we collaborate with various corporate clients to design detailed electrification and carbon-neutral strategies that align with their sustainability goals. Our holistic approach ensures that every step—from assessment to execution—supports our clients' transition towards a more sustainable, low-carbon future while maximizing their long-term operational efficiency.

Furthermore, Energy Sciences has planned, designed, and deployed innovative utility energy efficiency and demand-side management programs, pilots, and research initiatives (e.g., demonstration studies) across commercial, industrial, and agricultural sectors for numerous program administrators, including DTE Energy, Consumers Energy, ComEd, Ameren Illinois, Nicor Gas, Indiana Michigan Power, Aptim, Rochester Gas and Electric, and Southern California Gas.

We look forward to being considered by the City of Petoskey to collaborate on developing solutions that support the City's sustainability and energy-savings objectives as outlined in the Master Plan. Should you have any questions regarding this proposal, please do not hesitate to contact us.

Proposed Scope of Work

Project Summary & Tasks

Following the June 2021 resolution adopting the Livable Petoskey Mater Plan by the Petoskey City Council and Planning Commission, we understand that the City of Petoskey has affirmed its commitment to making the City a more resilient and sustainable community. This plan identified five (5) major priorities in six (6) chapters, and Energy Sciences is prepared to support the City with a project that aligns goals and suggested strategies outlined in the Community, Environmental Stewardship, Built Environment, and Local Economy chapters.

Building on previous discussions about the City's current needs and priorities and after reviewing the provided information, Energy Sciences proposes the following tasks be completed by Energy Sciences as a part of the CEM grant work:

- Complete an ASHRAE Level II Assessment of the Carnegie Building
- Select a small number of historic windows for rehabilitation as a pilot project and develop a full rehabilitation strategy for the Carnegie Building windows
- Develop an updated communications strategy to share updates with the community about the progress made towards implementation of the Mater Plan and foster a sense of engagement and inclusion between the community, businesses, and the City of Petoskey.

Task 1: ASHRAE Level II Assessment of the Carnegie Building

An ASHRAE Level II Assessment will be provided for the Carnegie Building. The Assessment is a detailed investigation and analysis of a facility's energy performance that offers actionable recommendations for improving efficiency, and it will include the following:

1. Preliminary data collection in preparation for a site visit to the Carnegie Building
 - a. Gather 12-24 months of utility bills and other operational data to establish energy use trends.
 - b. Review building information such as previous assessment reports, building plans, equipment specifications, operational schedules, etc.
2. Initial Walk-Through Survey
 - a. Conduct a walkthrough inspection to observe the building's systems, including HVAC, lighting, and controls, and to identify any obvious energy-saving opportunities.
 - b. Interview facility managers and operators to understand operational procedures, maintenance practices, and existing issues.
3. Energy Use Analysis and System Assessment
 - a. Benchmark Energy Performance by comparing the building's energy performance against similar facilities using tools like ENERGY STAR Portfolio Manager.
 - b. Analyze energy use data to determine when and how energy is consumed throughout the day and year.

- c. Review HVAC, lighting, and other significant energy systems and identify Potential Energy Conservation Measures (ECMs). Highlight opportunities for energy and cost savings through upgrades or operational changes.
4. Cost-Benefit Analysis
 - a. Estimate savings and costs by quantifying the potential energy savings for each identified ECM and calculating the associated implementation costs.
 - b. Identify potential rebates or incentives and determine payback periods.
5. Recommendations Report
 - a. Compile findings into a report that details current energy usage, identified ECMs, estimated savings, and financial metrics.
 - b. Provide recommendations for short-term and long-term energy improvements.
 - c. Include information about available funding through State and Federal grants and potential utility rebates.

Task 2: Window Repair Strategy for the Carnegie Building

Windows define the character and are among the most distinctive features of any structure; they are integral to the overall composition of historic buildings but also significantly impact the energy usage of the building. Based on a review of the provided facility assessment report, Energy Sciences will use the following process to develop an approach to rehabilitate the deteriorated historic windows for the Carnegie Building:

1. Review and Update Yearly Maintenance Procedures
 - Specify the type of best practices for historic windows to be incorporated (e.g., cleaning, weatherproofing, inspection frequency).
 - Consider training staff in historic window maintenance techniques to ensure procedures are effectively implemented.
2. Complete a Thorough Historic Window Assessment
 - Select a specialized historic preservation consultant and determine what specific tools or methods will be used to evaluate structural integrity, rot, water damage, and previous repairs.
3. Generate a Report
 - Detail the information with photos, condition scoring, and recommended treatment levels.
 - Include an energy efficiency analysis comparing the potential savings of repairing vs. replacing windows and exploring options like adding storm windows while retaining the maximum character and function for each window.
4. Develop an Incremental Rehabilitation Schedule
 - Break down the criteria for prioritizing window rehabilitation, restoration, or replacements, such as the severity of damage, building use, or visibility.
 - Provide a timeline with clear milestones and budget estimates for phased implementation.

5. Pilot Project and Scaling Strategy

- Define the criteria for selecting the pilot project (e.g., choosing windows that require moderate repairs to facilitate practical learning).
- Outline documentation processes, including taking pre- and post-repair photos and collecting stakeholder feedback.
- Research potential funding sources for future scaling, such as grants or partnerships with preservation organizations.
- Verify that the pilot project work on the windows adheres to the guidelines outlined in *The Secretary of the Interior's Standards for the Treatment of Historic Properties*, including the specific criteria for preserving, rehabilitating, restoring, and reconstructing historic buildings.

Task 3: Develop a Project Communications Strategy

A well-crafted communication strategy is essential for fostering transparency, building trust, and ensuring alignment among all stakeholders. Effective communication allows the City to share its achievements, goals, and initiatives clearly, strengthening community engagement and support. By delivering consistent and tailored messages, the City can enhance connections with diverse community groups, including local businesses, schools, healthcare providers, and non-profits. This strategic approach not only keeps staff and community members informed but may also create a foundation for collaborative growth and participation.

Energy Sciences proposes to assist the City in developing a communication strategy centered on the historic windows rehabilitation project, with a framework that can be adapted for future initiatives. Our approach will focus on defining clear objectives, identifying key stakeholders and target audiences, and designing effective feedback mechanisms to facilitate two-way communication. The steps for accomplishing this task are detailed below.

1. Define Objectives

- Identify the key goals for the communication strategy, such as increasing public awareness, fostering community engagement, or documenting the process and its outcome.
- Ensure that the objectives align with this project's priorities.

2. Identify Stakeholders

- Map out all key stakeholder groups, including city staff, residents, local businesses, schools, etc.
- Prioritize audiences based on their influence and involvement in city projects.

3. Assess Current Communication Practices

- Review existing communication channels, practices, and tools used by the City.

4. Develop Core Messaging

- Create clear, consistent, and adaptable messages that convey the project's objectives and initiatives.

- Tailor messages for different audiences to ensure relevance and resonance.
- 5. Select Communication Channels
 - Choose appropriate communication platforms (e.g., social media, newsletters, public forums, websites) based on audience preferences and reach.
 - Incorporate a mix of traditional and digital channels to maximize engagement.
- 6. Plan Engagement Activities
 - Identify options that facilitate two-way communication for feedback throughout the project.
 - Include methods to involve underrepresented groups and address participation barriers.
- 7. Create a Communication Timeline
 - Develop a timeline outlining the rollout of messages, key engagement events, and project milestones.
 - Schedule regular updates to maintain transparency and keep stakeholders informed.
- 8. Pilot the Strategy
 - Use this project as a trial run to test messaging, channels, and engagement methods.
 - Gather feedback from participants and assess the effectiveness of the approach.
- 9. Analyze Feedback and Adjust
 - Collect and analyze feedback from stakeholders to identify areas for improvement.
 - Adapt for future initiatives, ensuring continued alignment with the City's goals and fostering lasting community involvement.

Project Deliverables & Timeline

The project deliverables will include:

- Carnegie Building
 - ASHRAE Level II Assessment Report
 - Historic Window Assessment Report
 - Window Rehabilitation Schedule
- Project Communications Strategy
 - Summary of results from running a small trial

Table 1 – Project Timeline*

	2024		2025											
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Contract Execution														
Proposal development and submittal	*													
Project Awarded by City of Petoskey		*												
Project Management														
Kick-off meeting		*												
Start-up activities: setting up folders, trackers, Smartsheet(s)														
Project closeout: wrap-up work, documentation, follow-up plan and closeout meeting													*	
Task 1 - ASHRAE Level II Assessment of the Carnegie Building														
Pre-assessment Analysis														
Site visit and inspection														
Data review and preparing report														
Meeting to present report and findings to City of Petoskey						*								
Task 2 - Window Rehabilitation Strategy for the Carnegie Building														
Review and update current maintenance protocols														
Historic Window Assessment														
Develop a Window Repair Schedule										*				
Select preliminary group windows for repairs or replacements and complete them														
Review outcomes and update the Window Repair Schedule													*	
Task 3 - Project Communications Strategy														
Review and record all current methods of communication and documents that outline the process														
Collaborate and complete a project-based communications engagement plan							*							
Communication messaging test run, feedback analysis and adjustment														
Review results, and determine future plans to expand and scale													*	

* This timeline is tentative and subject to change based on the award date of the grant from EGLE

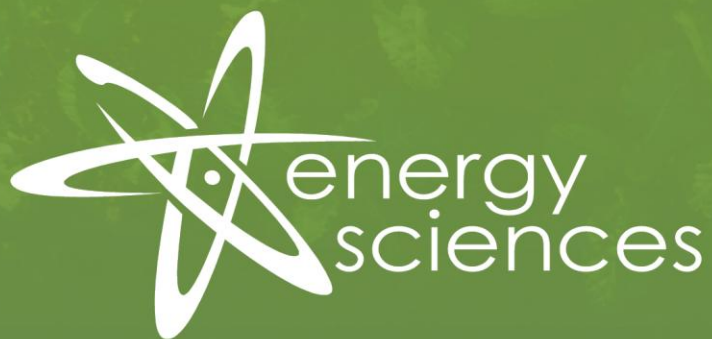
Energy Sciences is prepared to begin this project after receiving a signed contract and within two weeks of notice from the City after the grant has been awarded by EGLE. Invoicing will be done on a progress basis after each deliverable is complete.

Proposed Budget

The proposed budget for this project, shown in Table 2, will be fully covered by the CEM grant and includes a breakdown of costs associated with each task, from initial consultation to final delivery, project management, and other direct costs. Contingency funds have also been included to address any unforeseen challenges that may arise during the project, providing financial flexibility to maintain project timelines and quality standards.

Table 2 – Proposed Budget Breakdown

Item	Budget (\$)
Task 1: ASHRAE Level II Assessment of the Carnegie Building	\$22,200
Task 2: Window Repair Strategy for the Carnegie Building	\$15,860
Task 2: Historic window subcontractor for consultation and repairs	\$39,565
Task 3: Preliminary Communications Strategy	\$18,230
Other Direct Costs (travel, parking, lodging, etc.)	\$4,144
Grand Total	\$100,000



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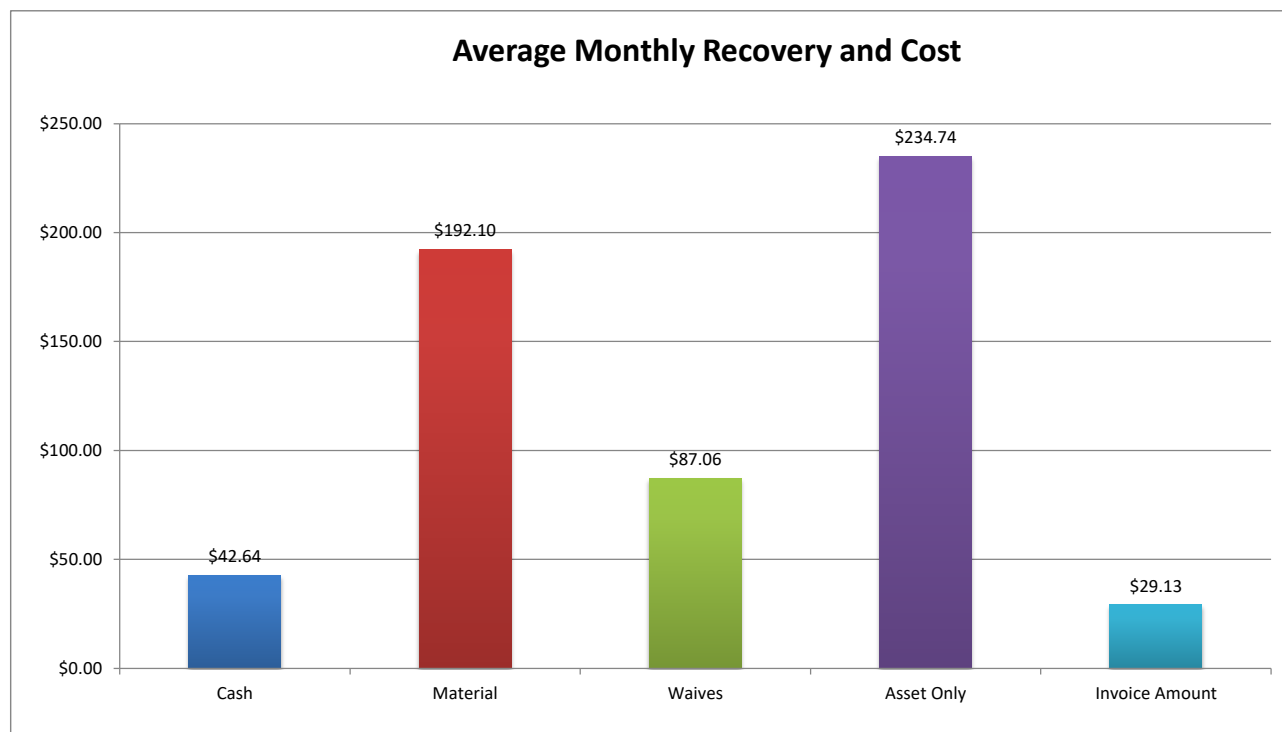
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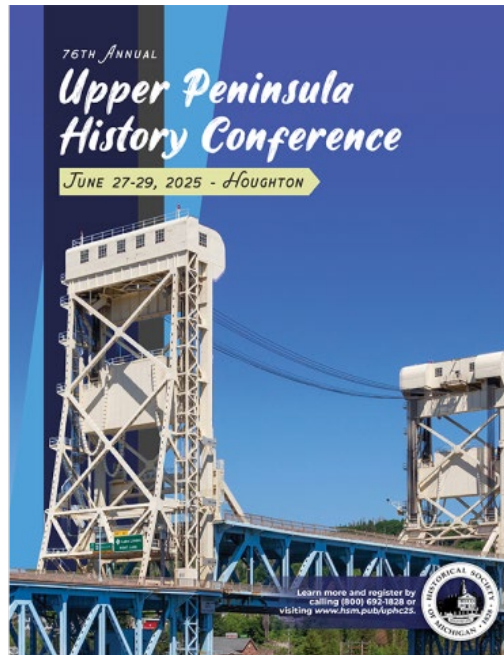


Monthly Recovery Statistics: Petoskey District Library

7/2024 Through 6/2025

Month	Cash	Material	Waives	Total	Assets Only	Invoice Amount
June-25	\$144.00	\$0.00	\$0.00	\$144.00	\$144.00	\$58.25
May-25	\$0.00	\$0.00	\$10.00	\$10.00	\$0.00	\$0.00
April-25	\$0.00	\$96.99	\$20.00	\$116.99	\$96.99	\$11.65
March-25	\$14.00	\$472.69	\$118.00	\$604.69	\$486.69	\$0.00
February-25	\$26.00	\$243.92	\$40.00	\$309.92	\$269.92	\$34.95
January-25	\$162.68	\$347.95	\$30.00	\$540.63	\$510.63	\$0.00
December-24	\$57.99	\$228.93	\$75.00	\$361.92	\$286.92	\$46.60
November-24	\$63.00	\$16.00	\$15.00	\$94.00	\$79.00	\$46.60
October-24	\$0.00	\$198.00	\$194.94	\$392.94	\$198.00	\$11.65
September-24	\$13.00	\$8.99	\$5.00	\$26.99	\$21.99	\$46.60
August-24	\$13.00	\$475.89	\$150.00	\$638.89	\$488.89	\$23.30
July-24	\$18.00	\$215.79	\$386.75	\$620.54	\$233.79	\$69.90
Total	\$511.67	\$2,305.15	\$1,044.69	\$3,861.51	\$2,816.82	\$349.50
Average	\$42.64	\$192.10	\$87.06	\$321.79	\$234.74	\$29.13
						Total ROI: \$11:1





Megan Goedge
Upper Peninsula History Conference
June 27-29, 2025
Houghton

My takeaway is that it was a great opportunity to learn some really fun stuff from really educated people. I loved that almost every presenter referenced the Michigan Tech Archives and talked specifically about libraries. By talking to folks attending the conference and hearing from the presenters about topics they obviously love, it's a great reminder that we should all be conscious stewards of what we have and where we are.

Friday, June 27

Open House: A.E. Seaman Mineral Museum

The museum houses 4,000 specimens and it is really big and exceptionally curated. It's designated as the Mineral Museum of Michigan. They had specimens from all over the world. There is a slideshow at the start that explains the history and a bio about each of the curators. [Jean Petermann Kemp Zimmer](#) stood out as the first woman curator and seemingly the first to catalogue the collection! The piece of Atacamite on the bottom right of the photo below was my favorite for its dark green color and fuzzy appearance.

The Systematic Mineral Collection

By the early 1800's scientists recognized that minerals were naturally occurring inorganic chemicals, and began to use chemistry as a means of classifying them. One such system, devised by James Dwight Dana in 1837, is still in use today. As presented here in cases M-1 to M-25, the Dana System organizes minerals according to chemical groups, beginning with the native elements, and progressing from relatively simple (e.g., sulfides, oxides, halides, etc.) to more complex chemical compounds (e.g., phosphates, silicates, etc.).

These chemical groups are broken down further into structural groups, comprising minerals with similar atomic structures (e.g., calcite group, spinel group, etc.). This parallels the hierarchy of *group*, *species* and *variety* used to organize mineral names. For example, amazonite is a blue *variety* of the *species* microcline, which is member of the feldspar *group* of minerals. Chemically it is a tectosilicate (KAlSi_3O_8 , see specimens in case M-17).

SYSTEMATIC MINERAL COLLECTION

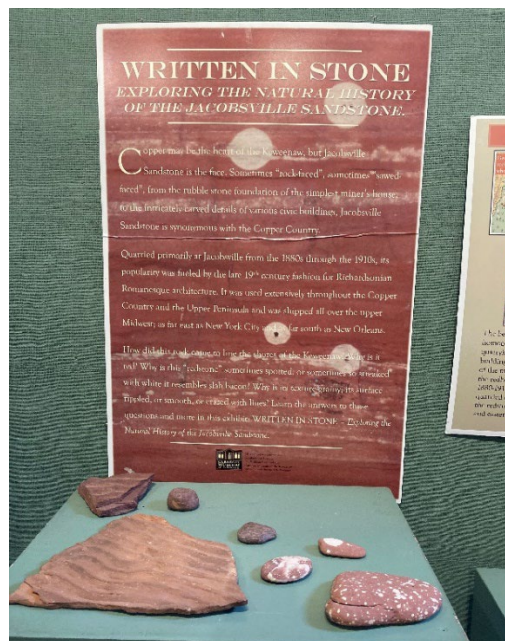
← **BEGIN HERE,**
End with Case M-25

Native Elements
Sulfides, Sulfosalts,
Oxides, etc.



Historic Houghton Tour

The director of the [Carnegie Museum of the Keweenaw](#), Elise Nelson, led us on a tour of Houghton, teaching us about the oldest buildings downtown. We started at the Carnegie building and learned about the fire station, the Masonic Temple, the Douglass House, a few of the residences, churches, and more. The stately buildings were built with Jacobsville sandstone, using mostly the red parts, not the white. The Douglass House was quite fancy when it was built and featured terraced gardens. It's now a senior living apartment, but still has an entry with marble steps and lots of brass. Elise explained what the waterfront on the canal would have been like during the copper mining boom, explaining it was probably very loud and smelly from constant ships, trains, and mining at the Quincy Mine just across the Portage Canal. Up until a few years ago, the waterfront was pretty dangerous with remnants of the warehouses. The City has cleaned it up and it has a great walking path and park. Before the tour I asked Elise when the Carnegie ceased to be a library. She had a great story! When it was built in 1909 it was a joint venture of the library and public schools. Fast forward almost a century and there was a lot of confusion about who actually owned the building. Not so different from other cities! It became clear that the school owned it so it had to be purchased from them to become the Museum and some citizens weren't happy about that. The floorplan is different than the Petoskey Carnegie and they had the children's collection in the basement. Their stone fireplace is front and center at the top of the steps. They had six exhibits. My personal favorites were the history of Jacobsville sandstone and the Postcards from Copper Country.



Saturday, June 28

Opening Keynote: The Flagbearer: “Big Annie” and the 1913-1914 Copper Country Strike

We were so lucky to have Emily Riippa Schwiebert give this keynote on what was her last day of her 10 year career at the Michigan Tech Archives. She opened with a scene of violence during the Copper Country strike then took us back to how it got to that. One catalyst was that technology advanced and a one man drill replaced the two man drill. The two man drills were

preferable because each team had another man looking out. When the one man drill took over, the pairs were broken up and there was no need for as many men down in the mine, or so the mining companies felt. Tram workers, who felt that they had the most arduous job with longer hours, were paid less. I loved that Emily specifically mentioned that the company towns had libraries, but the company chose what books could be in the libraries. Calumet and Hecla was a major mining company at the time and they refused to negotiate with a union. Anna Clemenc spearheaded the marches in support of the miners and carried an American flag through the streets of Calumet. Emily stated that Big Annie carried the flag to, "Uplift the country, not overthrow it." A few juicy tidbits were shared in the keynote that I hadn't read in Big Annie's biography.

Recommended reading:

Big Annie of Calumet : a true story of the Industrial Revolution by Jerry Stanley

Annie Clemenc and the Great Keweenaw Copper Strike by Lyndon Comstock

From Mining to Modernity: Michigan Technological University

Michigan Tech Archivist, Lindsay Hiltunen took us on the journey from the 1885 Michigan Mining School to Michigan Technological University as it is today. The first president was Marshman E. Wadsworth from 1887-1898 and at the time students could access technical report manuals and mining and geology books. This was the first iteration of the campus library. In 1925-1935, new degree paths were added in chemical, electrical, civil, and mechanical engineering. Forestry was added at this time, too. The college became a university under J. Robert Van Pelt and by 1963 enrollment had reached 2,700 students with only 44 in mining. Summer Youth Programs started in the 1970s and still happen now. In the early 2000s, the library had a major expansion and MTU recently received [R1 research university status](#). Lindsay encouraged us to look at the [Copper Mines Employee Card database](#).

The other half of this session was given by Dr. Sarah Scarlett, Associate Professor of History. Her talk was titled *History from Buildings* and she took us through what Houghton looked like as mining grew based on the buildings in the area. There was a mine east of Houghton in 1868 and a tram that went down to the stamp mill at the canal. The first building on the campus of Michigan Tech was State Hall/Hubbell Hall. The first dorm wasn't built until 1938 so it was important to note that students boarded in houses in town. She described how the stamp mill would have been loud and that [James Pryor](#), mining captain, built a stately home right next to it which seemed quite out of place. The house still stands and is used as a sorority house. It seemingly has 'two front entrances' for the side that faces College Avenue and the side that faces the canal. Dr. Scarlett has spent the last nine years creating the [Keweenaw Time Traveler](#). She specifically mentioned that due to the country's current administration, funding for the project is in jeopardy. Dr. Scarlett mentioned that Sanborn fire insurance maps are a great resource for information about buildings.

Recommended reading:

Company Suburbs: Architecture, Power, and the Transformation of Michigan's Mining Frontier by Sarah Fayen Scarlett

Extraordinary Women of the Upper Peninsula

Three of the 70 women in this traveling exhibit were highlighted in this session. First was Bamewawagezhikaquay also known as Jane Johnston Schoolcraft. She was a poet and ethnographer who was more or less forced to marry Henry Schoolcraft. It sounded like he supported her, but he also edited her work and took credit for it. There's much debate on whether his writings are cultural appropriation. Jane wrote a lot about nature. Jane's mother, Susan Johnston or Ozhaguscodawayquay, was mentioned because the family had an extensive collection of books for the 19th century Upper Peninsula. Quite a luxury.

The two other women were Verna Mize who started the Save Lake Superior Association and Dr. Kathleen Weston who worked on the polio vaccine.

I can't find the exhibit's current location but I'm going to investigate if we might get it at the Little Traverse History Museum. [The creators got a PBS spot.](#)

Recommended reading:

The Sound the Stars Make Rushing Through the Sky The Writings of Jane Johnston Schoolcraft by Jane Johnston Schoolcraft and edited by Robert Dale Parker

The Keweenaw's Geoheritage: Land, Water, & People

I'm still not sure I understand what geoheritage is, but I suppose it's our connection to a place based on its land, water, and people! Erika Vye is a geoscientist so she explained how Lake Superior was formed as a basin when the two miles (!) of ice melted. She also explained that we got lucky in the way our copper was formed (so it could be stripped to nothing, boo) and that due to the rock, minerals, water, and science, copper was formed at the top, not deep below. Fun fact! The Greenstone Lava Flow is the world's largest lava flow and it forms much of the Keweenaw Peninsula and Isle Royale. She also talked about [Jacobsville sandstone](#), a much beloved mineral in the UP.

Hanka Homestead Finnish Museum

The best part of the conference by far was the tour of the [Hanka Homestead](#). We were greeted by some of the volunteers who restored it and they talked to us about every single building and the homestead's history. They made Finnish treats for us, too. This place was absolutely incredible. My favorite building was the savusauna or smoke sauna. I had never heard of a smoke sauna. They built wood fires under the rocks and had racks above for drying meats and fish. When it was time to bathe or take a sauna, they would open a small vent to let the smoke out and douse the benches with water to clean off the soot. The milk house was built over the creek with a hole cut in the floor so milk, or other beverages, could be kept cold. The root cellar was built into the hill and has airlock doors! The Hanka Homestead was lovely, but most impressive was that someone cared enough to enough to buy it and a whole lot of people came together as volunteers to restore it let folks tour it.

Petoskey District Library

Proposal for Adding an Assistant Director Position

Creating an Assistant Director position at the library directly supports our strategic goal of *Caring for Staff* by recognizing and valuing the critical contributions of our existing team. We currently have a key staff member already performing the responsibilities of an assistant director, overseeing daily operations, managing staff, and supporting administrative decision-making, without the title or compensation that reflects this level of leadership. Formalizing this role not only acknowledges their dedication and skill, but also provides a clear path for professional growth, retention, and succession planning. This move demonstrates our commitment to fair workload distribution, internal promotion, and creating a sustainable leadership structure that benefits the entire organization. Please see attached job description.

Petoskey District Library

Job Description

July 2025

Assistant Director

Supervised By: Library Director
Supervises: Circulation Department staff
FLSA: Exempt
Salary Range: \$52,600 - \$78,900

We are passionate about building and sustaining an inclusive and equitable environment for all staff and patrons. We believe every team member enriches our overall strength by exposing us to a broad range of ways to understand and serve our community.

General Summary:

The Petoskey District Library (PDL) Assistant Director needs to be a person with a vision of libraries in a new age, future thinking and innovative. The Assistant Director will provide quality services to the diverse users of the PDL. The Assistant Director performs administrative and advanced professional work; oversees and manages library operations and services. In addition, the Assistant Director serves as administrative manager for Circulation Services and has in-charge duties in the absence of Library Director.

Distinguishing features of the work, under the direction of the Library Director, involves responsibility for the supervision and effective operation of the PDL Circulation Desk. The Assistant Director works with the Library Director and the Management Team in planning and implementing library services; planning budgets; and proposing policies to the Library Board of Trustees.

Essential Job Functions:

An employee in this position may be called upon to do any or all of the functions listed below. These examples do not include all of the duties which the employee may be expected to perform. To perform this job successfully, an individual must be able to perform each essential function satisfactorily.

- Manage all aspects of the circulation department, including scheduling and supervising the current staff, hiring and training new staff, and all other circulation functions.
- Assists with recruiting, interviewing and hiring staff; helps orient and train employees
- Able to manage, coach, hold accountable and conduct effective performance appraisals for designated staff; regularly meets with Management Team and staff to exchange information
- Collaborates with Library Director in management decisions and recommendations to Library Board regarding finances, administration, problems, staffing, planning and policies.
- Attends monthly board meetings in the absence of the director.
- Helps plan, prepare and implement annual library budget for approval by the Library Board; helps monitor expenditures and operational costs throughout the year
- Manages the scheduling software and assist in scheduling for all departments; manage scheduling for staff meetings
- Manage all receipts, including creating bi-weekly deposits and managing all aspects of

donations.

- Manage office and library supply orders
- Manage library phone and voicemail system
- Assist Adult Services Librarian in some aspects of collection development.
- Interacts and communicates effectively with customers, staff, Library Board, City of Petoskey Staff, community organizations, businesses and Friends of the Library; models customer service expectations and leadership skills; promotes open communication.
- Oversees management and operations of Public Services and Circulation to ensure all services are conducted ethically and in compliance with policies; helps resolve problem situations with customers
- Assumes leadership of library in Library Director's absence
- Participates in community activities and provides positive image of the library
- Maintains membership in appropriate professional library and community organizations; attends library conferences and events to ensure continual professional development; shares information with staff and Library Board; promotes opportunities for professional development to staff
- Attends various staff and city/township meetings; serves on various library committees
- Maintains reliable attendance
- Performs related duties and special projects assigned by Director
- Helps ensure safe, neat and orderly appearance of library areas, especially those in the public area and of designated staff

Required Knowledge, Skills, Abilities and Minimum Qualifications:

The requirements listed below are representative of the knowledge, skills, abilities and minimum qualifications necessary to perform the essential functions of the position. Reasonable accommodations may be made to enable someone with a qualifying disability to perform the essential functions of the position.

- At least four years of upper management, administration and supervisory experience with a strong commitment to public service
- Masters degree in Library Science from an ALA accredited college or university
- Knowledge of public library practices, management and supervisory techniques, scheduling, collection development and technology applications
- Knowledge of personnel management and public library budgetary practices and responsibilities
- Excellent computer, technology and Internet skills with ability to learn and efficiently operate library computer system, with peripherals, and programs
- Proven leadership and management skills that foster teamwork, effective communication, innovation and an engaged staff.
- Ability to plan, implement and evaluate effective library services, strategies and facilities
- Excellent organizational, problem-solving, process management and facilitation skills
- Ability to appropriately handle confidential and sensitive information, with discretion and trust
- Evidence of past community involvement
- Ability to write and communicate a staff schedule on a monthly and daily basis
- Excellent interpersonal skills and public service manner for modeling customer service expectations
- Excellent communication skills, oral and written, and public-speaking/presentation skills with the ability to interact harmoniously and communicate well with staff and customers
- Flexibility to adapt to changing situations and to vary work schedule; must be willing and able to work nights and weekends—including Saturdays and Sundays
- Satisfactory criminal background check

Physical Demands and Work Environment:

The physical demands and work environment characteristics described here are representative of those an employee encounters while performing the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk and hear. The employee frequently is required to reach with hands and arms, and use hands to finger, handle, or feel. The employee must have the ability to sit and use computer for extended periods and operate standard office equipment. The employee must frequently lift and/or move up to fifty (50) pounds and set up tables and chairs. Specific vision abilities required by this job include close vision, color vision and ability to adjust focus. While performing the duties of this job, the employee regularly works in a library setting. The noise level in the work environment is usually quiet to moderate. But the employee must also have the ability to effectively work under stressful conditions in a fast-paced environment. The employee is also required to periodically participate and attend events and training.

This position description is not intended to be a complete list of all responsibilities, skills or working conditions associated with position and is subject to review and change at any time in accordance with the needs of the Petoskey District Library.

PETOSKEY DISTRICT LIBRARY IS AN EQUAL OPPORTUNITY EMPLOYER

Petoskey District Library

Strategic Plan Priority 3: Care of Staff

We have begun our work on the third strategic priority, Care of Staff. Here's where we are at: (items in green need approval as New Business item #3)

1. Part-time staff have received Earned Sick Time (mandated) and Paid Holiday time.
2. In order to better meet the needs of our staff, and to provide a welcoming and supportive environment, we organized a Wellness Committee to plan different ways the library can support the wellbeing of the staff. This committee has been meeting and had a few recommendations right off the start and they are currently working on other in-house types of wellness activities.
 - a. Recommendation: increase in longevity bonuses as presented at the May meeting (attached), with an average cost of \$1900 per year.
 - b. Recommendation: Personnel committee to review wages
 - c. Requesting an annual budget of \$1700 to continue strengthening our cohesiveness as a team and improving all staff well-being. Some of the current requests include:
 - i. Quarterly Pizza Day - \$400
 - ii. Mail Box Snack Days - \$300
 - iii. Annual Chair massages - \$400
 - iv. Gathering w/ other local library staff - \$200
 - v. Educational webinar or excursion- \$400
3. In order to bolster the team spirit and more cohesiveness, I would like to also offer a clothing or SWAG budget for all staff on a biannual basis (every other year):
 - a. Pick either a tshirt or tote & mug at no charge: \$350
 - b. \$30 per staff to purchase library logo wear: \$700
4. Personnel Committee recommendation of a Wage Scale Adjustment (see attached documentation): 15% over three years plus Cost of Living adjustment each year.

Projected Annual Costs:

- Earned Sick Time (legally mandated and approved at a previous meeting):
 - 466 part-time hours at an average of \$18.55 / hour: \$ 8,650
- Paid Holiday (approved at a previous meeting):
 - 269 part-time hours at an average of \$18.55 / hour: \$5,000
- Longevity, as recommended by committee: \$1,900
- Wellness Committee activities: \$1,700
- Logo Wear (every other or third year): \$ 525

Total cost of increased staff benefits: \$ 17,775

Increase not including mandated Earned Sick Time: \$ 9,125

Total increase for additional benefits, not yet approved: \$ 4,125

- Wage Increases: Overall increase in wages for 2026 is proposed at 7.1%, which includes a 2.5% COLA for all staff.

Request to Update Staff Longevity Payments

The library's long-term success depends on the dedication, knowledge, and continuity provided by its staff. However, our current longevity pay structure—\$10 at 3 years, \$100 at 10 years, \$200 at 20 years, and \$300 at 30 years—falls short of meaningfully recognizing the value of that commitment. As the City of Petoskey recently enhanced its longevity payments to more appropriately reward employee service, the library would like the opportunity to adopt a similar schedule, but at 50% of the cost, in a way that aligns with one of our newly approved Strategic Priorities: taking care of staff.

The proposed longevity schedule for library employees would provide \$50 at 3 years, \$150 at 5 years, \$300 at 10 years, \$450 at 15 years, \$600 at 20 years, and \$750 at 25 years and every five years thereafter. This approach offers a more consistent and motivating form of recognition while remaining financially responsible. It's a modest investment with a strong return in staff morale, retention, and a culture of appreciation.

Nearly every initiative we pursue depends on experienced, engaged employees. Updating our longevity pay structure is a simple but meaningful way to show our staff that their years of service are seen, valued, and celebrated. By approving this revised plan, the Library Board would be putting our strategic priority of staff care into practice—making clear that we value the people who make our mission possible.

Here is a side-by-side comparison chart of the Current Library Longevity Pay, the City of Petoskey's New Longevity Pay, and the Proposed Library Longevity Pay (50% of City's Plan):

Years of Service	Current Library Pay	City of Petoskey Pay	Proposed Library Pay (50%)
3 years	\$10	—	\$50
5 years	—	\$300	\$150
10 years	\$100	\$600	\$300
15 years	—	\$900	\$450
20 years	\$200	\$1200	\$600
25 years	—	\$1500	\$750
30 years	\$300	\$1500	\$750
Every 5 years after —	—	\$1500	\$750

This chart clearly illustrates the disparity between the current structure and a more meaningful, sustainable alternative. The proposed schedule acknowledges and rewards long-term service while staying within a manageable cost framework.

If all staff remain with us, the average annual cost over the next six years of the proposed plan is \$1,900 (city proposal average is \$3,700). The longevity payments would be part of the annual budgeting process. It would be budgeted within the salary line items, beginning with 2026.

Petoskey District Library

Proposal to Adjust Wage Scale in Alignment with Strategic Priority: Care for Staff

At the first meeting of the Library Wellness Committee, the topic of salaries was raised as a central concern. In response, a Personnel Committee was formed and tasked with conducting a comprehensive wage study to assess how our compensation compares both within the library field and across our local job market.

The committee first reviewed salary data from four comparable libraries: Boyne City and Charlevoix (smaller, but regionally relevant), Traverse City (a larger "up north" resort town and a likely staffing competitor), and Manistee (similar in size and services, and also a resort community).

Our analysis showed that while the current full-time librarian salaries at Petoskey District Library are competitive, the starting wages are 19% lower. Part-time librarians currently are approximately 7% less than their counterparts and starting wage is about 9% less. Library Assistants currently about 5% less than their counterparts and the starting wage is almost 11% less. This looks to be attributed to the fact that many of our full-time librarians have been here for over ten years. Our wage scale should be adjusted upwards, to not only come closer to the starting of other libraries, but to also accommodate future raises for staff, who are close to the top of their pay scale.

Recognizing that our staff are not only recruited by other libraries but also by local employers, we expanded the study to include wages from Emmet County, the City of Petoskey, Petoskey Public Schools, and three area businesses. This comparison highlighted a more significant gap:

- Full-time positions: 3%–15% below local counterparts.
- Part-time positions: 12%–29% below local equivalents.

While it is encouraging that we are not dramatically behind, these numbers underscore the need for action. As stated in **Goal 2 of the Care for Staff strategic priority**, the library board must “provide adequate funding and support for staffing positions to be competitive in the Petoskey area.” This is critical if we are to maintain a healthy organizational culture, retain qualified staff, and continue to deliver excellent public service.

Recommendation:

To meet this goal, the Personnel Committee recommends increasing the base wage scale by **15% over a three-year period** for all positions. Plus, the committee recommends applying an annual cost-of-living adjustment (COLA) each year. This phased approach will bring our wages more in line—or ahead—of peer organizations, making the library a better place to work for all as well as a more competitive and attractive employer. The Personnel Committee will meet again in year three for a similar wage / salary survey. The wage scale proposed includes an estimated 2.5% COLA each year. This will be adjusted for the current actual COLA in year 2027 and 2028.

An investment in our staff is a direct investment in the quality of service we provide to our community. It is essential to sustaining a motivated, skilled, and stable workforce. The director will be able to utilize this wage scale adjustment in developing an annual raise structure to support the staff and better align with our counterparts.

Petoskey District Library Three-year Wage Proposal

PDL: Wage Scale: 2025

Position	PDL Wage Range		Hourly equivalent (37.5hr work wk - except for Dir.)	
Director	68,640	110,000	33.00	52.88
Senior Level Librarian	41,600	62,400	21.33	32.00
Librarian - FT	37,960	56,940	19.47	29.20
Librarian - PT	17.68	26.52		
Technology Manager	44,720	67,080	22.93	34.40
Facility Manager - PT	20.00	30.00		
Library Asst Manager - FT	35,880	53,820	18.40	27.60
Library Assistant - FT	33,800	50,700	17.33	26.00
Library Assistant - PT	14.50	21.75		
Library Shelver	13.50	20.25		

PDL: Wage Scale: 2026 Proposed - 8% (plus 2.5% COLA)

Position	PDL Wage Range		Hourly equivalent (37.5hr work wk - except for Dir.)	
Director	78,936	118,404	37.95	56.93
Assistant Director	52,600	78,900	26.97	40.46
Senior Level Librarian	47,840	71,760	24.53	36.80
Librarian - FT	43,654	65,481	22.39	33.58
Librarian - PT	20.33	30.50		
Technology Manager	51,428	77,142	26.37	39.56
Facility Manager - PT	23.00	34.50		
Library Asst Manager - FT	41,262	61,893	21.16	31.74
Library Assistant - FT	38,870	58,305	19.93	29.90
Library Assistant - PT	16.50	24.75		
Library Shelver	15.00	22.50		

PDL: Wage Scale: 2027 Proposed - 5% (plus 2.5% COLA)

Position	PDL Wage Range		Hourly equivalent (37.5hr work wk - except for Dir.)	
Director	84,856	127,284	40.80	61.19
Assistant Director	56,545	84,818	29.00	43.50
Senior Level Librarian	51,428	77,142	26.37	39.56
Librarian - FT	46,928	70,392	24.07	36.10
Librarian - PT	21.86	32.79		
Technology Manager	55,285	82,928	28.35	42.53
Facility Manager - PT	24.73	37.09		
Library Asst Manager - FT	44,357	66,535	22.75	34.12
Library Assistant - FT	41,785	62,678	21.43	32.14
Library Assistant - PT	17.74	26.61		
Library Shelver	16.13	24.19		

PDL: Wage Scale: 2028 Proposed - 2% (plus 2.5% COLA)

Position	PDL Wage Range		Hourly equivalent (37.5hr work wk - except for Dir.)	
Director	86,978	130,466	41.82	62.72
Assistant Director	59,090	88,634	30.30	45.45
Senior Level Librarian	53,742	80,613	27.56	41.34
Librarian - FT	49,040	73,560	25.15	37.72
Librarian - PT	22.84	34.26		
Technology Manager	57,773	86,659	29.63	44.44
Facility Manager - PT	25.84	38.76		
Library Asst Manager - FT	46,353	69,529	23.77	35.66
Library Assistant - FT	43,666	65,498	22.39	33.59
Library Assistant - PT	18.54	27.80		
Library Shelver	16.85	25.28		

Averages of four libraries surveyed: Charlevoix, Boyne, Traverse City, Manistee

Row Labels	Average of Current hourly or annual salary	Average of How many hours per week?	Average of How many years has this person been with you?	Average of Starting Salary at this position?
Clerk - Full time	18.78	38.17	10.50	17.86
Clerk - Part time	18.20	18.33	4.00	16.27
Degreed Librarian - Full time	28.27	39.00	5.25	26.44
Degreed Librarian - Part time	22.93	21.25	12.50	19.48
Librarian, non degreed - Full time	23.20	36.88	17.00	15.23
Librarian, non degreed - Part time	19.89	21.25	9.00	15.65
Shelver - part time	13.71	10.00	1.00	11.65

Petoskey District Library

Assistant - Part time	17.30			14.50
Degreed Librarian - Full time	29.03	37.5	14	21.33
Degreed Librarian - Part time	21.30		15	17.68
Librarian, non degreed - Full time	22.46	37.5	7.5	18.40
Librarian, non degreed - Part time				
Shelver - part time	14.31		1	13.50
Difference in other libraries vs Petoskey:	Current Salary			Starting Salary
Assistant - Part time	4.9%	% PDL is lower	% PDL is lower	10.9%
Degreed Librarian - Full time	-2.7%	% PDL is higher	% PDL is lower	19.3%
Degreed Librarian - Part time	7.1%	% PDL is lower	% PDL is lower	9.2%
Librarian, non degreed - Full time	3.2%	% PDL is lower	% PDL is higher	-20.8%
Shelver - part time	-4.4%	% PDL is higher	% PDL is higher	-15.8%

Current Wages from Emmet County, City of Petoskey, Public Schools of Petoskey, and three other downtown establishments: June 2025

	Position	Current hourly	hours per week	years with you	Starting Salary	Do you provide any creative, non traditional benefits? If so, please describe.
1	A/P Clerk - CoP	25.23	40.00	4.00	23.00	
1	Administrative Asst: CoP	25.22	40.00	3.00		
1	Buyer FT	18.00	40.00	3.00	18.00	wholesale clothing, store credit, bonus
1	Cashier/Stocker	17.31	varies	2.00	15.50	
1	Deputy Clerk, PT - EC	21.85			21.85	HS grad
1	Payroll clerk: CoP	27.36	40.00	27.00	24.00	
1	Part-time Sales	25.00			15.00	
1	Receptionist Clerk: CoP	24.50	40.00	1.00	24.50	lots of experience
1	Receptionist	17.50	40.00	1.00		
1	Sales Assoc	15.00		3.00	13.50	first job
1	Sales Assoc	30.00	40.00	10.00		Bonus, freebies; staff party; swag;
1	Secretary	25.11	40.00	8.00	20.51	
1	Utility Billing: CoP	25.09	40.00	6.20	19.54	
1	Deputy court administrator - EC	28.77			28.77	Assoc Degree + experience
1	Seasonal Workers - EC	20.57			17.00	.50 pay incentive for meeting all criteria
Average:		23.10			20.10	
2	Admin Manager	29.97	38.00	10.00	23.23	
2	Bookkeeper	25.00	40.00	4.00		
2	Store Level Manager	24.99	38.00	6.00	20.20	staff discount, free coffee/tea during shift; footwear/wellness reimuburse; pizza, bonuses, logo apparel
2	Teacher w/ MA: PSP	35.16	40.00	8.00	37.10	Adjusted salary for a 40 hour work week. Was 50.23 for 28 / wk
2	Teacher: PSP	32.41	40.00	8.00	34.25	Adjusted salary for a 40 hour work week. Was 46.30 for 28 / wk
2	Deputy Sheriff - EC	28.71			28.71	HS plus police academy
2	Internal Controls Specialist - EC	33.95			33.95	BS in accounting, 5 years experience
Average:		30.03			29.57	
1	Custodian: PSP	25.11	40.00	8.00	20.51	
Petoskey Library:						
	Degreed Librarian - Full time	29.03	37.5	14	21.33	
	Degreed Librarian - Part time	21.30		15	17.68	
	Librarian, non degreed - Full time	22.46	37.5	7.5	18.40	
	Library Assistant - Full time	19.75			17.33	
	Library Assistant - Part time	17.30			14.50	
	Shelver - part time	14.31		1	13.50	
	Facility - part time	22.05		1	20.00	
Differences of Averages compared to PDL:						
	Librarian, non degreed - Full time	2.8%	% PDL is lower			
	Library Assistant - Full time	14.5%	% PDL is lower			
	Library Assistant - Part time	25.1%	% PDL is lower			
	Degreed Librarian - Full time	3.3%	% PDL is lower			
	Degreed Librarian - Part time	29.1%	% PDL is lower			
	Facility - part time	12.2%	% PDL is lower			

Petoskey District Library

2026 Budget Discussion

We are concentrating on meeting priorities from the strategic plan. Many of our action items do not have cost, besides staff time. But those that do have a cost will be included in the budget process.

Here is a list of our action items for 2025 and 2026. Those in green are complete. Those in blue are in process. Those with no highlight have yet to begin.

Goal Number	Description
2-3	Magnetic logo labels for cars when we go do outreach
2-3	Magnetic “stickers” for cars for our patrons
2-3	PDL logos on outdoor bookdrops
3-2	Review current salary structure; be a leader in the community
4-2	Increase budget to accommodate the purchase of additional titles to reduce wait times
1-1	Technology to all the meeting rooms – smart board
4-2	Run report to look at current wait time averages for in-house and digital
2-3	Create Bibliocommons list and send link out with emails
2-3	Review current enews – make it more readable
2-3	Service: discuss and implement new avenues of getting our information about services out to public
2-3	Instructional videos (short)
2-3	Texting ability for news alerts
1-1	Lighting – at staircase
2-1	Review building hours: patron usage mapping, flexible scheduling
3-1	Creativity in job description
1-1	Examine meeting room policy – usage
1-2	Signage – info desk, stair case – hanging plaque – do a signage audit
3-3	Succession Plan for Technology Manager
1-1	New patron holds shelf / book cart corral
2-1	Civil Discourse events
4-1	Create a plan for service of the month
2-2	Concentrate on popular, current events
1-1	Office review/repair - water damage issue
1-1	Carnegie lower level - update air control
2-1	Sponsored outreach vehicle – book bike, bookmobile, book wagon
1-2	Expand seating outside

Petoskey District Library

Budget Amendment Request: 7/24/2025

Revenue

271-081-566 Grants \$30,000

There is a \$30,000 increase in the grants revenue due to two Petoskey-Harbor Springs Area Community Foundation grants. We received a 2024 grant for the A/V equipment at the Carnegie. Those funds were deposited in 2025 calendar year. We also received a 2025 grant for the Meeting Booth. This was awarded after our budget approval timeframe.

Expense

271-790-970 Capital Outlay \$155,000

This is for the new roof. We did not know the exact number prior to budget approval.

For Your Information

271-081-657 Reimbursements and 271-790-930 Building Maintenance

We will be filing an insurance claim for the water damage including concrete repair, drywall repair and replacement, HVAC repair, ceiling tile replacement, carpet replacement, and possible mold remediation. The amount is unknown at this time. Once we receive the claims and the bills are paid, I will be requesting another amendment for these line items.

Petoskey District Library: 2025 Budget AMENDMENT

Account Number	Account Description	2024 Audited Year End	2025 Budget	2025 YTD June 30	2025 Anticipated	Budget Amendment Request (7/17/2025)	2025 Amended Budget (7/17/2025)
<u>OPERATING REVENUES</u>							
<u>Operating Revenues:</u>							
271-081-402.000	STATE AID	17,758	18500	9331	18500		18500
271-081-403.000	PROPERTY TAX for Operations: City of Petoskey	1,019,552	1056100		1056100		1056100
271-081-405.000	PROPERTY TAX - Bear Creek	227,974	253900	252075	252075		253900
271-081-407.000	PROPERTY TAX - Resort Twp.	178,236	207200	200806	200806		207200
271-081-409.000	PROPERTY TAX - Little Traverse Twp.	147,278	166400	165273	165273		166400
271-081-411.000	PROPERTY TAX - Springvale Twp.	53,836	58000	59377	59377		58000
271-081-445.000	Penalties and Interest	1,470	3000	2155	2155		3000
271-081-566.000	GRANTS	25,784	22800	46452	52600	30000	52800
271-081-657.000	PENAL FINES	72,284	60000		60000		60000
271-081-658.000	REIMBURSEMENTS	3,497	6500	3741	5000		6500
271-081-687.000	PAID CARDS	3,745	3000	2155	4000		3000
271-081-692.000	COPIES / fees	6,089	4000	3330	6000		4000
271-081-694.000	BOOKSALE	14,458	12000	6406	13000		12000
271-081-695.000	CONTRACTED WAGES	12,423	12000	9636	12000		12000
271.081.696	Merchandise Sales	746	500	1192	1500		500
<u>Non-operational Revenues:</u>							
271-082-664.000	INTEREST INCOME	18,573	12000	5485	11000		12000

Petoskey District Library: 2025 Budget AMENDMENT

Account Number	Account Description	2024 Audited Year End	2025 Budget	2025 YTD June 30	2025 Anticipated	Budget Amendment Request (7/17/2025)	2025 Amended Budget (7/17/2025)
271-082-671	UNREALIZED GAIN/LOSS ON INVEST	(713)					0
271-082-682.000	OTHER	5,559	4000	2860	5000		4000
271-082-684.000	BUILDING RENTAL	8,550	8000	5913	8500		8000
271-082-696.000	DONATIONS	41,293	40000	6873	41000		40000
	TOTAL REVENUES:	1,858,392	1947900	783060	1973886	30000	1977900
<u>OPERATING EXPENDITURES</u>							
271-790-702.000	SALARIES & WAGES: Full Time	472,651	498500	240387	498500		498500
271-790-704.000	SALARIES & WAGES: Part Time	218,566	264100	116723	268921		264100
271-790-724.000	FRINGE BENEFITS	227,525	236400	130099	236770		236400
271-790-751.000	OFFICE/LIBRARY SUPPLIES	11,434	10000	4975	10000		10000
271-790-752.000	BUILDING SUPPLIES	9,169	7000	4775	8500		7000
271-790-760.000	BOOKS - ADULT	35,790	45000	17012	45000		45000
271-790-760.1.000	BOOKS - CHILDRENS	19,913	25000	10297	25000		25000
271-790-760.2.000	BOOKS - YOUNG ADULT	4,829	5500	1883	5500		5500
	Total Books:	60,532	75500		75500		75500
271-790-760.400	PERIODICALS	7,867	9000	1728	9000		9000
271-790-761.000	AUDIO VISUAL - ADULT	10,366	11000	3979	11000		11000
271-790-761.100	AUDIO VISUAL - CHILDRENS	1,016	1500	460	1500		1500
271-790-761.200	AUDIO VISUAL - YOUNG ADULT	417	600	270	600		600

Petoskey District Library: 2025 Budget AMENDMENT

Account Number	Account Description	2024 Audited Year End	2025 Budget	2025 YTD June 30	2025 Anticipated	Budget Amendment Request (7/17/2025)	2025 Amended Budget (7/17/2025)
	Total AV:	11,799	13100		13100		13100
271-790-762.000	ELECTRONIC MATERIALS	34,943	51500	43189	51500		51500
271-790-762.1	DATABASES	5,758	7000	1625	7000		7000
271-790-801.000	PROFESSIONAL SERVICES	2,419	3000	1930	3000		3000
271-790-802.000	CONTRACTED SERVICES	143,476	124710	59841	124710		124710
271-790-850.000	COMMUNICATIONS	7,916	8100	3060	7500		8100
271-790-880.000	COMMUNITY OUTREACH	3,760	3000	832	3000		3000
271-790-885.000	Donations Expense	1,767	3000	1	2000		3000
271-790-887.000	Bank Charges	527	500	407	800		500
271-790-905.000	PRINTING/ADVERTISING/ POSTAGE	38,573	45000	21354	45000		45000
271-790-912.000	TRAINING/TRAVEL	11,769	11000	3282	11000		11000
271-790-915.000	MEMBERSHIP & DUES	2,177	2400	822	2400		2400
271-790-920.000	PUBLIC UTILITIES	34,713	32000	13669	34000		32000
271-790-924.000	HEATING FUEL	10,869	17500	11848	17500		17500
271-790-930.000	BUILDING REPAIR & MAINTENANCE	44,759	55000	20339	75000		55000
271-790-931.000	EQUIPMENT REPAIR & MAINTENANCE	4,611	10400	4629	10400		10400
271-790-937.000	INSURANCE & BONDS	11,105	12000	12097	12100		12000
271-790-955.000	MISCELLANEAOUS	1,992	3000	1649	2500		3000
271-790-958.000	PROGRAMMING - CHILDRENS	6,338	8500	4263	7500		8500

Petoskey District Library: 2025 Budget AMENDMENT

Account Number	Account Description	2024 Audited Year End	2025 Budget	2025 YTD June 30	2025 Anticipated	Budget Amendment Request (7/17/2025)	2025 Amended Budget (7/17/2025)
271-790-958.100	PROGRAMMING - ADULT	8,639	15000	5893	12000		15000
271-790-958.200	PROGRAMMING - YOUNG ADULT	2,907	2500	2061	3000		2500
271-790-964	MAKERSPACE: equipment/supplies	3,268	3500	1526	3500		3500
271-790-970.000	CAPITAL OUTLAY	111,950	45000	90455	200000	155000	200000
271-790-985.000	EQUIPMENT	2,368	5000	0	5000		5000
271-790-986.000	TECH - EQUIPMENT & SOFTWARE	22,361	32500	3972	32500		32500
271-790-995.000	ADMINISTRATIVE FEES	7,000	7200	7200	7200		7200
	Total Operating Expenditures:	1,545,508	1,621,910	848,532	1,800,401	155,000	1776910
BOND EXPENDITURES							
271-792-991.000	PRINCIPAL PAYMENT	260,000	255000		255000		255000
271-792-992.000	INTEREST PAYMENT	14,294	12100	6037	12100		12100
271-792-993.000	PAYING AGENT FEES	250	300		250		300
	Total Debt Expenditures:	274,544	267,400	6,037	267,350		267400
	TOTAL EXPENDITURES:	1,820,052	1,889,310	854,569	2,067,751		2,044,310
	Excess Of Revenues Over Expenditures	38,340	58,590	58,590	(93,865)		(66,410)
	General Fund Balance	170,160	228750	287340	76295		170160
	Building Reserve Fund Balance	273,000	273000	273000	273000		206590