



TOWN OF LEDYARD CONNECTICUT

Library Commission

~ AGENDA ~

Chair
John Bolduc

Bill Library
718 Colonel Ledyard Highway
Ledyard, Connecticut 06339

Gales Ferry Library
18 Hurlbutt Road
Gales Ferry, Connecticut 06335

Regular Meeting

Monday, August 17, 2026

7:00 PM

Gales Ferry Community Center

****This Meeting Canceled due to Lack of Quorum****

I. CALL TO ORDER

II. ROLL CALL

III. RESIDENTS & PROPERTY OWNERS COMMENTS

IV. PRESENTATIONS / INFORMATIONAL ITEMS

V. MEMBER COMMENTS

VI. CORRESPONDENCE

1. Grenger Resignation

Attachments: [GRENGER - Resignation Email](#)
[GRENGER - Council Response](#)

VII. REPORTS

1. Director's Report

Attachments: [Director Report 08.2026](#)
[FY 2027 Municipal Budget Worksheet](#)
[06.2026 LPL Monthly Stats Report](#)
[07.2026 LPL Monthly Stats Report](#)

2. Treasurer's Report

3. Investment Working Group

Attachments: [Bill Library Association Portfolio Update June 2026](#)

4. Friends of Ledyard Library

VIII. APPROVAL OF MINUTES

1. Motion to approve the Library Commission Regular Meeting Minutes from June 15, 2026.

Attachments: [Regular Meeting Minutes June 15, 2026](#)

IX. OLD BUSINESS

Any Old Business proper to come before the Committee

X. NEW BUSINESS

Any New Business proper to come before the Committee

1. Secretary Role

Attachments: [BYLAWS-Revised-12.10.18](#)

2. Holiday List

3. Age Related Policies

Attachments: [2026 Draft Circulation Policies and Procedures](#)
[2026 Draft Computer Internet Policy](#)
[2026 Draft Unattended Child Policy](#)
[2026.07 Draft Behavior Policy](#)
[2026 Draft Computer Internet Policy](#)

4. Motion to approve the Library Commission's budget for FY27.

Attachments: [Commission FY27 Budget Proposal](#)

5. Motion to approve the Investment Working Group's recommendation about which investment fund to deposit Nancy Avery's bequest.

XI. ADJOURNMENT

DISCLAIMER: Although we try to be timely and accurate these are not official records of the Town.



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1185

Agenda Date: 8/17/2026

Agenda #: 1.

AGENDA ITEM
CORRESPONDENCE

Subject:

Grenger Resignation

Correspondence List:

See attached files.

Fwd: Resignation

8/2/26 10:15 AM

From: "John Bolduc" <jfbceo@tvconnect.net>

To: "Jessica Franco" <jfranco@ledyardlibrary.org>

Jessa:

Please add this resignation email under correspondence.

John Bolduc

Home: 860-464-0366

Cell: 860-287-9467

jfbceo@tvconnect.net

From: "Ellin Grenger" <egrenger@gmail.com>**To:** "John Bolduc" <jfbceo@tvconnect.net>, "Rolf Racich" <rolfracich@gmail.com>, "Elizabeth Rumery" <rumcats@msn.com>, "Thorne, Gillian" <gbthorne@sbcglobal.net>, "Cynthia Wright" <kwright8@comcast.net>, "Peter Diette" <peter@peterdiette.com>, "ralph hightower1970" <ralph.hightower1970@gmail.com>, "Wendy Hellekson" <wendy@hellekson.com>**Sent:** Sunday, August 2, 2026 9:28:04 AM**Subject:** Resignation

Good morning, Library Commission:

I wanted to let you all know how much I have enjoyed working with you, and getting to know some of you, too. As you have likely noticed, there is a lot of friction at this point between myself and the Library Director: additional concerns arose after the June meeting. I have shared those concerns with the Town Council, with the hope being that the Town Council Administration committee will review the concerns and use it as an opportunity to have consistent rules in place for Departments with paid staff / volunteer governance, FOI compliance, meeting agenda and minute posting, and handling of funds consistent with published policies. In the interim, however, I did resign from the Commission, as I do not see any productive way forward.

Many thanks for all of your ongoing commitment to the Library and beyond: as the TC noted in accepting my resignation, the Town is run by volunteers. It is beyond disappointing that that message is missed in this set of circumstances. I'm at the farmers market most Wednesdays, and hope to run into all of you somewhere soon!

Ellin



TOWN OF LEDYARD CONNECTICUT TOWN COUNCIL

741 Colonel Ledyard Highway
Ledyard, Connecticut 06339-1551
(860) 464-3203
council@ledyardct.org

Chairman Gary A. St. Vil

July 30, 2026

Ms. Ellin M. Grenger
15 Bittersweet Drive
Gales Ferry, Connecticut 06335

Dear Ms. Grenger:

Upon receiving your July 27, 2026, resignation from the Library Commission, the Town Council would like to sincerely thank you for your twelve years of dedicated service to the Town of Ledyard.

During your time on the Commission, including your service as recording secretary, your commitment and attention to detail helped support the continued success of Ledyard's libraries. Your contributions were especially meaningful during a period of significant growth, change, and challenge for our community.

Ledyard's libraries remain an important resource for residents of all ages. This was particularly evident during the COVID-19 pandemic, when the Library Commission and library staff adapted programs and services to meet the changing needs of the community. Homebound and curbside services, virtual programming, and continued access to computers and the internet helped residents remain informed, connected, and supported during a very uncertain time.

Your years of service, guidance, and commitment helped ensure that our libraries continued to provide a welcoming environment and valuable resources to the residents of Ledyard.

We appreciate your candor regarding your decision to step down. The Town Council is grateful for your many years of service and for your dedication to the Library Commission and our community. It is volunteers like you who make Ledyard a wonderful place to live, learn, and raise a family.

With Our Sincere Appreciation,

Gary A. St. Vil
Chairman

cc: Library Director



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1189

Agenda Date: 8/17/2026

Agenda #: 1.

REPORT

Staff/Committee Report:
Director's Report

Director's Report to the Library Commission

Discussing June & July 2026 | Presented August 2026

Taking July off means a very long Director's Report! Thank you in advance for reading though everything, and please let me know if you have any questions.

Maternity Leave:

- Staff did a wonderful job managing the library in my absence, including navigating multiple high attendance programs and internet outages. They kept everything running smoothly until my return and I am thankful to have such an amazing team!

Budget:

- During the budget presentation to the Town Council in March, it was requested that we restructure our funds to present a better understanding of the exact cost of the LION Consortium. When discussing this with the Finance Department, they recommended making the change at the beginning of FY27 so it would be easier to compare budgets when presenting our FY28 proposal. As I prepared this change, I noticed we had a number of funds that were allocated in inappropriate lines. I have since reorganized the budget within the existing Munis structure. Any changes that require a new line, even if we are transferring in already approved funds, need Council approval and would have to wait until FY28. With that in mind, please see the attached document that includes the original budget structure and the adjusted one. I am happy to answer questions about what was moved and why during our meeting.
- When I mentioned the change in budget break down at the last meeting, it was requested that we separate e-materials from physical materials. Unfortunately, due to the restraints of only using existing lines within Munis, I am not able to do that at this time. However, I am happy to include it here:
 - *Electronic Materials: \$17,276*
 - LION OverDrive: \$7,276 (this is a contractual obligation through LION and is thus included in the LION line of Munis, not the books/materials line.)
 - OverDrive Advantage Collection: \$2,000
 - Hoopla: \$8,000 (Hoopla is supplemented by the Friends who pay the service directly. They budgeted \$12,000 in their FY25. Please note that they run on a different fiscal year, Oct.-Sept.)
 - *Physical Materials: \$44,274*
 - Periodicals: \$4,756
 - Adult Materials: \$19,600
 - Youth Materials: \$18,676

- *Other: \$50*
 - Ledyard High School Yearbook: \$50

General Library News:

- We finished the weeding project at Bill and swapped the locations of the Fiction and Non-Fiction collections. In doing so, we were able to expand the following collections for both teens and adults: Large Print, Graphic Novel, and International Language. We are very excited to be able to meet patron needs by growing these collections!
- The library was approved for a staff scheduling program. We implemented Humanity in July, which allows staff to view their schedule online or an app, submit leave requests, express interest in open shifts, and more. It should make scheduling easier and faster, while also allowing us to quickly compare to payroll.
- With the start of the fiscal year, we began an analysis of our current services and collections. The goal was to evaluate their return on investment and ensure that funds are being allocated appropriately. Specifically, we are looking at JobNow and newspapers:
 - After reviewing JobNow's stats for the past few years and with the knowledge that the State Library was providing a comparable service, free to libraries, we opted to cancel it. Unfortunately, the State announced the cancelation of their service exactly one week after the group-buy period for member libraries in the Connecticut Library Consortium ended. Should we decide to reinvest, we will have to wait until next year. While we do not have comparable service, it still only served 26 people in the last year. We plan to assist patrons in-house and refer them to local agencies who would offer services and assistance designed for our geographic area.
 - As for the newspapers, The Day's pricing has remained relatively stable and has consistent, noticeable usage. It is also one of the only sources for local news, making it a highly valued resource in our community. USA Today and Wall Street Journal had significant price increases last year outside of what we had budgeted. While we were able to afford them for another year due to the Friend's generous support of Hoopla, we are concerned about their costs moving forward. To better understand the usage of these two newspapers, we are asking patrons to mark on a tally sheet whenever they use one. No decisions have been made about newspapers at this time. Regardless of what we decide for the Wall Street Journal and USA Today, we will continue our membership for The Day.
- Ledyard High School students made us lost and found boxes. The design is Lorraine's vision that the students brought to life. New procedures for managing lost and found items were developed and the boxes are established in both buildings. We are grateful for their support and craftsmanship!
- I am planning to start our strategic planning process in September. The planning team will consist of the Director, as well as representatives from the Commission, Friends of

Ledyard Library, Adult Services, Youth Services, and Circulation. My goal is to include staff from multiple professional levels, including a Library Associate. Working group sessions will be held with the full commission, friends' group, and staff, as well as community conversations, surveys, and interviews. The planning team will facilitate these groups and help sort through the feedback. I hope the Commission can select someone to be on the team during this meeting.

- The Mayor has approved the library to host occasional after-hours events. We are planning to partner with the Friends of Ledyard Library on a Fairy Ball in October, as well as an event with the Grinch in December. We will share additional details when they are finalized.
- The Connecticut State Library reached out about a new initiative they are partnering on with DEEP. The Laptop ConneCT program will provide free laptops to every principal public library in Connecticut. The laptops are meant to circulate to qualified residents for long term loans, with the exception of a small percentage for in-library use. The Library is required to host intake appointments, followed by training sessions before issuing laptops. The State is providing curriculum for the training. We plan to partner with Social Services to develop a procedure for distribution. Laptops should arrive sometime in September.

Summer Reading

- A full evaluation of our Summer Reading / Summer Adventure Program will be available in the next Director's Report, but here is a snapshot:
- Adult
 - We're proud to say that this Summer Reading has been incredibly successful! As of August 8, we have 203 people registered, which is a 223% increase from last year. Of those who responded, 85% were Ledyard/Gales Ferry residents, and 72% of all participants said they heard about the program through library staff.
 - A new change we've implemented is doing weekly drawings, which has gone very well. There is one more weekly drawing left, and the grand prize drawing. We hope to use what we've learned and make summer reading even better next year
- Youth Services
 - We are happy to report that we have had a highly successful summer programming season for our youth patrons! Programs have been well attended, with almost all reaching capacity, demonstrating strong community interest and participation. Our Summer Adventure Program encouraged consistent reading habits while special events, hands-on activities, performers, and educational workshops brought new and returning patrons into the library. Our Adventure Program is unique in that it not only logs reading but anything participants make or explore as well. This allows for more participation, especially from those reluctant readers who are often difficult to engage.

- As of August 8 we have 436 total registrants. This includes 385 individual registrations and 51 registrations from our pilot program with Child's Play Day Care Center. This pilot program will help us form the basis for reaching out to other day cares and involving them in the program next summer. Additionally, there have been 2,521 logged from our individual registrants and 35 adventures logged by Child's Play. We expect this number to increase before logging adventures closes on August 15.
- It has been a rewarding and impactful summer! The strong registration numbers, consistent engagement, and positive response to our programs highlight the library's important role as a welcoming community hub for families with children and teens. Going forward, we will continue to do our best to offer opportunities for learning, discovery, and connection for all ages.

Library Building:

- With the end of the fiscal year, I used our remaining funds to fulfill some building wish list items, including:
 - Bill Library
 - ADA Accessible Doorknobs for the maintenance closet, basement, and storage closet
 - Two small book carts, one for shelving and one for Technical Services
 - New bulletin board material to refurbish the existing boards in the meeting room. This will remain partially done in anticipation of the technology being added to the space (see below).
 - Gales Ferry Library
 - Single-sided book carts for storing books that need to be shelved
 - Small book cart for shelving
 - A new rug for the Children's Department; the old one was relocated to Bill
 - Replaced a broken office chair
 - Storage shelf for the basement
 - Both Libraries
 - Poopbag dispensers were mounted in both bathrooms. Instead of asking families to dispose of their soiled diapers in the dumpster, families can use a bag to contain the smells and mess. As a new mom, I have first hand experience of how helpful this is!
- When exploring our options for hybrid meetings, I asked the Town's IT Department what resources they could share. Justin is in the process of a multi-year CIP to upgrade the Town's meeting spaces for hybrid capability. For FY27, he was able to get us a camera system for hybrid meetings. The camera system is incredibly advanced and we are

grateful that he included our building in his plans! Staff received training on August 7, so we are all set to use it for both meetings and programs. For FY28, he offered to help replace our screen and projector with a SmartBoard. With this in mind, I am refraining from finishing the bulletin board project, as they will be removed to accommodate the new equipment. Any upgrades for Gales Ferry meetings need to be discussed with Parks & Recreation as they hold the lease for the Community Center. Staff will discuss internally about any technical needs the Library has for the Gales Ferry basement, taking into consideration accessibility and storage.

Library Field News

- The federal government is considering changes to or ending the E-Rate program. This is the program that provides discounted access to internet for schools and libraries. This year, Ledyard Public Library will receive \$1,476 for internet access and \$2,400 for dark fiber. Over the years, we have received \$49,616 in discounts or reimbursements. I would encourage everyone to review the [proposals](#) and the Schools Health & Library Broadband Coalition's [action page](#) for an in-depth overview of the changes and how you can share your voice on the matter.
- The American Library Association announced a new [The Librarians' and Library Workers' Bill of Rights](#). The resolution is simple, often assumed, but necessary to formalize in today's environment. We are fortunate to work for a community that values our library workers and their wellbeing.

Town News

- The Town's committee for celebrating America's 250th anniversary asked if we could display their poster exhibit. Each of the 10 posters features a Ledyard resident who played a role in American history and culture. The posters start with William Ledyard and end with present day Casey Neistat, a content creator known for videos that blend art, journalism, and storytelling. The exhibit is on display through the end of August, when it will be moved to the schools.

Voting & Discussion Items

- It is not in the governing documents for the Commission to approve Holidays. As Library employees have union contact negotiated holidays, we will utilize the Town's approved list moving forward.
- The following items are for discussion and eventual voting. They do not need to be completed during this meeting, however I want to start the conversation around them.
 - While onboarding, I familiarized myself with the library's policies. I found a number of inconsistencies regarding ages and circulation loan periods. The attached policies would align the ages to the State's law for unattended children, which is 12 years old.

- I would also like to propose eliminating the Internet Permission Form and replacing it with a more comprehensive Internet Use Policy, also attached. To verify that the form was no longer necessary, I reached out to Brian Grimmer, our E-Rate consultant. He said that it is a common misconception that E-Rate requires a permission form. As long as we meet other requirements, such as the filtering software, we are in compliance. I also feel that the form is a barrier to students who may be using our resources with no ill intention. It also doesn't address wireless access, which many youth utilize without our knowledge.

Jessica Franco, Library Director
jfranco@ledyardlibrary.org

FY 2027 New Organization Library Budget

Budget line		Reconstructed Amount	Original Amount	Difference
Training		\$ 2,500.00	\$ 2,500.00	0
Equipment Maintenance		\$ 9,750.00	\$ 1,800.00	\$ 7,950.00
	Photocopier rent	\$ 3,050.00		
	Photocopier imaging	\$ 2,900.00		
	Printer Supplies	\$ 2,000.00		
	Equipment Maintenance	\$ 1,800.00		
Contracts		\$ 8,102.00	\$ 8,152.00	\$ (50.00)
	Bill Library - CEN	\$ 900.00		
	Gales Ferry Library - CEN	\$ 3,000.00		
	E-Rate Online	\$ 2,000.00		
	Water	\$ 2,200.00		
	Rent BL & GFL	\$ 2.00		
Telephone & Fax Service		\$ 4,200.00	\$ 4,200.00	\$ -
Operating Expenses		\$ 13,835.00	\$ 15,135.00	\$ (1,300.00)
	Mileage	\$ 2,200.00		
	WB MASON (previously office)	\$ 2,000.00		
	Amazon (previously cleaning)	\$ 2,500.00		
	Adult Program/Craft	\$ 1,000.00		
	Processing supplies	\$ 1,900.00		
	Dues (CLC, ACLB)	\$ 935.00		
	Special projects	\$ 1,000.00		
	Children's Program/Craft	\$ 1,000.00		
	Staff Scheduling Platform	\$ 600.00		
	FindIT ILL	\$ 700.00		
LION Reg Network		\$ 57,939.00	\$ 56,563.00	\$ 1,376.00
	Operational Fees	\$ 43,280.00		
	Pika	\$ 1,506.00		
	Delivery	\$ 4,127.00		
	Capria Mobile	\$ 1,260.00		
	LION Overdrive e-materials	\$ 7,276.00		

	Domain name renewal	\$ 30.00					
	Self check annual maintenance	\$ 460.00					
Library Materials			\$ 54,524.00	\$ 62,500.00	\$ (7,976.00)		
	Advantage e-materials	\$ 2,000.00					
	Physical materials	\$ 44,300.00					
	New Collections	\$ 224.00					
	Hoopla	\$ 8,000.00					
	TOTAL BUDGET		\$ 150,850.00	\$ 150,850.00			

General Services	B	GF	LPL	Last Month	Change	Notes
People Count	2429	1611	4040	3518	15%	
Directional Questions	106	71	177	148	20%	
Reference Questions	229	240	469	296	58%	
Privacy Booth Use	0	0	0	5	-100%	
Library Card Registrations	35	20	55	44	25%	
Meeting Room Use	10	1	11	12	-8%	
Meeting Room Attendance	94	2	96	139	-31%	
Website (pending)			0			
Wireless Use	1161	666	1827	1802	1%	
Computer Use	187	128	315	281	12%	
Homebound Participants	0	0	0		0%	
Homebound Deliveries	0	0	0		0%	
Seed Library (Packets Distributed)	115	82	197	294	-49%	
Adult Volunteers	2	0	2	2	0%	
Adult Volunteer Hours	9.5	0	9.5	2	375%	Collection Shifting
Youth Volunteers	5	0	5	1	400%	
Youth Volunteer Hours	19	0	19	3.5	443%	

Online Resources	LPL	Last Month	Change	Notes
hoopla (Checkouts)	441	407	8%	
hoopla (Active Users)	201	188	7%	New metric
Libby (Checkouts)	1982	2061	-4%	
Libby (Active Users)	444	422	5%	
Palace Project (Checkouts)	42	50	-16%	
Palace Project (Patron Signups)	2	2	0%	
Ancestry (Unique Sessions)	37	104	-64%	
Job Now (Unique Visits)	0	32	-100%	
Workforce Solutions (Page Visits)	0	0	0%	
Shoutbomb (Total Texts for the Month)	168	220	-24%	
Transparent Language (Unique Users)	8	4	100%	
Transparent Language (Total Sessions)	64	41	56%	

Marketing	LPL	Last Month	Change	Notes
Constant Contact Open Rate	49%	47%	4%	
Constant Contact Subscribers	1948	1948	0%	
Facebook Followers	2535	2492	2%	
Facebook Content Interactions	751	413	82%	
Facebook Viewers	9694	5388	80%	
Instagram Followers	959	948	1%	
Instagram Content Interactions	127	15	747%	
Instagram Reach	392	128	206%	

Circulation	B	GF	LPL	Last Month	Change	Notes
A. Fiction	484	399	883	794	11%	
A. Non-Fiction	259	159	418	412	1%	
A. Graphic Novel	6	3	9	8	13%	
A. Magazines	38	14	52	69	-25%	
A. Audio	10	3	13	6	117%	
A. Music	6	39	45	83	-46%	
A. DVD	245	93	338	229	48%	
A. Other	104	41	145	96	51%	
Adult Total	1152	751	1903	1697	12%	
YA Fiction	91	46	137	86	59%	
YA Non-Fiction	13	8	21	13	62%	
YA Graphic Novel	27	13	40	48	-17%	
YA Other	6	2	8	17	-53%	
YA Total	137	69	206	164	26%	
J Fiction	771	565	1336	1128	18%	
J Non-Fiction	166	111	277	264	5%	
J Picture Book	570	316	886	868	2%	
J Graphic Novel	289	171	460	348	32%	
J DVD	134	57	191	122	57%	
J Audio	45	102	147	170	-14%	
J Other	116	2	118	172	-31%	
Juvenile Total	2091	1324	3415	3072	11%	
Museum Passes	8	1	9	8	13%	
Total Circulation	3380	2144	5524	4933	12%	

Programming	LPL	Last Month	Change	Notes
<i>Adult</i>				
In-Person Onsite Programs	12	9	33%	
In-Person Onsite Attendance	90	40	125%	
In-Person Offsite Programs	1	1	0%	
In-Person Offsite Attendance	5	7	-29%	
Self-Directed Activities	0	0		
Self-Directed Activities Participation	0	0		
<i>Teen</i>				
In-Person Onsite Programs	3	0		
In-Person Onsite Attendance	42	0		
In-Person Offsite Programs	0	0	0%	
In-Person Offsite Attendance	0	0	0%	
Self-Directed Activities	0	0	0%	
Self-Directed Activities Participation	0	0	0%	
<i>Children</i>				
In-Person Onsite Programs	5	10	-50%	Youth services takes a short break before summer starts
In-Person Onsite Attendance	192	196	-2%	
In-Person Offsite Programs	0	1	-100%	
In-Person Offsite Attendance	0	12	-100%	
Self-Directed Activities	5	4	25%	
Self-Directed Activities Participation	331	238	39%	

General Services	B	GF	LPL	Last Month	Change	Notes
People Count	2571	1733	4304	4040	7%	
Library Card New Registrations	19	18	37	55	-33%	
Total Library Card Holders	5211	2737	7948	7911	0%	Includes both active and inactive cards
Directional Questions	106	50	156	177	-12%	
Reference Questions	208	172	380	469	-19%	
Privacy Booth Use	7	0	7	0	#DIV/0!	
Meeting Room Use	7	1	8	11	-27%	
Meeting Room Attendance	44	5	49	96	-49%	
Website Sessions	N/A	N/A	901	N/A		Started recording at the N/A end of July
Wireless Use	1170	715	1885	1827	3%	
Computer Use			0	315	-100%	
Homebound Participants	0	0	0	0	0%	Outreach planned for Sept.
Homebound Deliveries	0	0	0	0	0%	
Seed Library (Packets Distributed)	28	15	43	197	-358%	
Adult Volunteers	2	0	2	2	0%	
Adult Volunteer Hours	3.25	0	3.25	9.5	-66%	
Youth Volunteers	5	0	5	1	400%	
Youth Volunteer Hours	21.5	0	21.5	3.5	514%	

Online Resources	LPL	Last Month	Change	Notes
hoopla (Checkouts)	477	441	8%	
hoopla (Active Users)	217	201	8%	
Libby (Checkouts)	2356	1982	19%	
Libby (Active Users)	480	444	8%	
Palace Project (Checkouts)	29	42	-31%	
Palace Project (Patron Signups)	21	2	950%	
Ancestry (Unique Sessions)	22	37	-41%	
Shoutbomb (Total Texts for the Month)	228	168	36%	
Transparent Language (Unique Users)	7	8	-13%	
Transparent Language (Total Sessions)	26	64	-59%	

Marketing	LPL	Last Month	Change	Notes
Constant Contact Open Rate	50%	49%	1%	
Constant Contact Subscribers	2000	1948	3%	
Facebook Followers	2584	2535	2%	
Facebook Content Interactions	617	751	-18%	
Facebook Viewers	10656	9694	10%	
Instagram Followers	975	959	2%	
Instagram Content Interactions	227	127	79%	
Instagram Reach	672	392	71%	

Circulation	B	GF	LPL	Last Month	Change	Notes
A. Fiction	555	401	956	883	8%	
A. Non-Fiction	193	158	351	418	-16%	
A. Graphic Novel	16	2	18	9	100%	
A. Magazines	63	8	71	52	37%	
A. Audio	6	6	12	13	-8%	
A. Music	0	8	8	45	-82%	
A. DVD	288	160	448	338	33%	
A. Other	73	60	133	145	-8%	
Adult Total	1194	803	1997	1903	5%	
YA Fiction	93	26	119	137	-13%	
YA Non-Fiction	14	10	24	21	14%	
YA Graphic Novel	29	25	54	40	35%	
YA Other	5	0	5	8	-38%	
YA Total	141	61	202	206	-2%	
J Fiction	886	811	1697	1336	27%	
J Non-Fiction	209	124	333	277	20%	
J Picture Book	603	464	1067	886	20%	
J Graphic Novel	344	179	523	460	14%	
J DVD	118	48	166	191	-13%	
J Audio	100	48	148	147	1%	
J Other	136	82	218	118	85%	
Juvenile Total	2396	1756	4152	3415	22%	
Museum Passes	27	5	32	9	256%	
Total Circulation	3731	2620	6351	5524	15%	

Programming	LPL	Last Month	Change	Notes
<i>Adult</i>				
In-Person Onsite Programs	10	12	-17%	
In-Person Onsite Attendance	58	90	-36%	
In-Person Offsite Programs	1	1	0%	
In-Person Offsite Attendance	7	5	40%	
Self-Directed Activities	0	0	0%	
Self-Directed Activities Participation	0	0	0%	
<i>Teen</i>				
In-Person Onsite Programs	5	3	67%	
In-Person Onsite Attendance	38	42	0%	
In-Person Offsite Programs	0	0	0%	
In-Person Offsite Attendance	0	0	0%	
Self-Directed Activities	0	0	0%	
Self-Directed Activities Participation	0	0	0%	
<i>Children</i>				
In-Person Onsite Programs	18	5	260%	
In-Person Onsite Attendance	619	192	222%	
In-Person Offsite Programs	1	0	100%	
In-Person Offsite Attendance	0	0	0%	
Self-Directed Activities	7	5	40%	
Self-Directed Activities Participation	457	331	38%	



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1190

Agenda Date: 8/17/2026

Agenda #: 2.

REPORT

Staff/Committee Report:
Treasurer's Report



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1188

Agenda Date: 8/17/2026

Agenda #: 3.

REPORT

Staff/Committee Report:
Investment Working Group



SALVATORE J TOCCO IV

401-831-8224
WWW.JANNEY.COM

THE BILL LIBRARY ASSOCIATION

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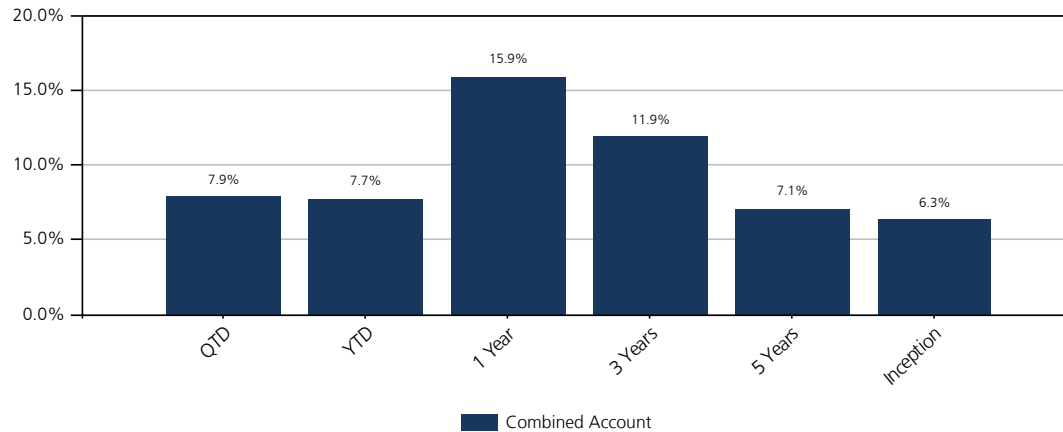
COMBINED PERFORMANCE AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION

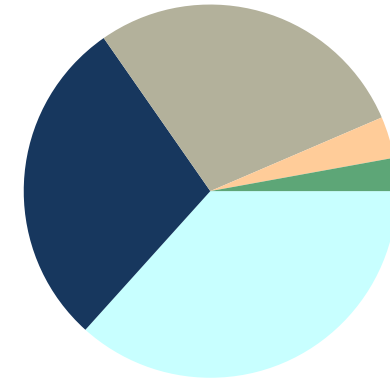


Account HH00054479-1

Investment Return Graph



Current Account Allocation



	Account Name Program Portfolio Style	Inception Date	Account Value	Quarter To Date	Year To Date	One Year	Three Year	Since Inception
	The Bill Library Association Total Combined Account	11/26/2012	\$1,821,447	7.87%	7.72%	15.95%	11.85%	6.34%
XXXX1774	The Bill Library Building Fund COMPASS	11/26/2012	\$668,046	9.13%	7.43%	14.93%	11.24%	6.16%
XXXX6601	The William Holton Memorial Fund COMPASS	11/23/2016	\$521,621	5.72%	6.47%	14.92%	12.30%	7.53%
XXXX4488	The William Holton Memorial Fund 2 COMPASS	11/22/2023	\$514,120	8.23%	9.39%	18.52%		14.55%

COMBINED PERFORMANCE AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

	Account Name Program Portfolio Style	Inception Date	Account Value	Quarter To Date	Year To Date	One Year	Three Year	Since Inception
XXXX2811	Library Commission Funds-Gales Ferry Library AMERICAN FUNDS AF Moderate Growth & Income	3/30/2022	\$65,559	9.06%	7.75%	15.40%	13.73%	9.81%
XXXX8251	Library Commission Funds-Either Library AMERICAN FUNDS AF Moderate Growth & Income	12/29/2016	\$52,101	8.81%	7.66%	15.23%	13.55%	7.95%

The returns for all periods greater than 1 year are annualized. Yearly trailing returns are calculated using 12 month periods, not actual 365 days, and may include a partial month for reports run mid-month.

PORTFOLIO SUMMARY AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX1774 THE BILL LIBRARY BUILDING FUND

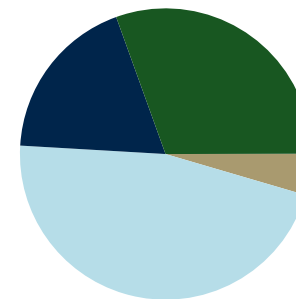
COMPASS

Statement of Portfolio Changes

	Quarter To Date	Year To Date	Since Inception 11/26/2012
Total Beginning Value	\$612,134	\$621,824	\$269,127
Net Deposits/Withdrawals	\$0	\$0	\$27,392
Total Earnings	\$55,912	\$46,222	\$371,526
Total Ending Value	\$668,046	\$668,046	\$668,046

Beginning/ending values and performance returns exclude assets not custodied at Janney such as annuities and certain mutual funds. Total value including these "non-performance" assets and accrued income is \$668,046

Current Asset Allocation



Calendar Year Rate of Return

	2026	2025	2024	2023	2022	Since Inception 11/26/2012
Your Portfolio	7.43%	14.67%	7.58%	13.64%	-15.71%	6.16%

Trailing Year Rate of Return

	Quarter To Date	Year To Date	One Year	Three Year	Five Year	Seven Year
Your Portfolio	9.13%	7.43%	14.93%	11.24%	5.38%	7.72%

The returns for all periods greater than 1 year are annualized. Yearly trailing returns are calculated using 12 month periods, not actual 365 days, and may include a partial month for reports run mid-month.

PORTFOLIO SUMMARY AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX6601 THE WILLIAM HOLTON MEMORIAL FUND

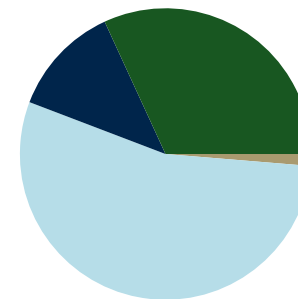
COMPASS

Statement of Portfolio Changes

	Quarter To Date	Year To Date	Since Inception 11/23/2016
Total Beginning Value	\$494,361	\$490,509	\$1,110
Net Deposits/Withdrawals	-\$16	-\$16	\$164,173
Total Earnings	\$27,275	\$31,127	\$356,338
Total Ending Value	\$521,621	\$521,621	\$521,621

Beginning/ending values and performance returns exclude assets not custodied at Janney such as annuities and certain mutual funds. Total value including these "non-performance" assets and accrued income is \$525,387

Current Asset Allocation



Calendar Year Rate of Return

	2026	2025	2024	2023	2022	Since Inception 11/23/2016
Your Portfolio	6.47%	16.47%	10.33%	4.60%	-4.05%	7.53%

Trailing Year Rate of Return

	Quarter To Date	Year To Date	One Year	Three Year	Five Year	Seven Year
Your Portfolio	5.72%	6.47%	14.92%	12.30%	8.26%	8.60%

The returns for all periods greater than 1 year are annualized. Yearly trailing returns are calculated using 12 month periods, not actual 365 days, and may include a partial month for reports run mid-month.

PORTFOLIO SUMMARY AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX4488 THE WILLIAM HOLTON MEMORIAL FUND 2

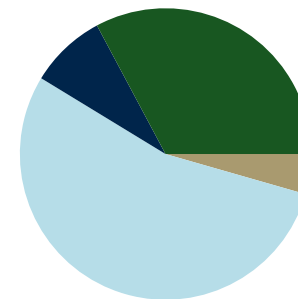
COMPASS

Statement of Portfolio Changes

	Quarter To Date	Year To Date	Since Inception 11/22/2023
Total Beginning Value	\$475,078	\$469,857	\$361,665
Net Deposits/Withdrawals	-\$56	-\$56	-\$56
Total Earnings	\$39,098	\$44,319	\$152,511
Total Ending Value	\$514,120	\$514,120	\$514,120

Beginning/ending values and performance returns exclude assets not custodied at Janney such as annuities and certain mutual funds. Total value including these "non-performance" assets and accrued income is \$517,063

Current Asset Allocation



Calendar Year Rate of Return

	2026	2025	2024	2023*	Since Inception 11/22/2023
Your Portfolio	9.39%	11.62%	11.87%	4.28%	14.55%

* The return reflected is for a partial year

Trailing Year Rate of Return

	Quarter To Date	Year To Date	One Year
Your Portfolio	8.23%	9.39%	18.52%

The returns for all periods greater than 1 year are annualized. Yearly trailing returns are calculated using 12 month periods, not actual 365 days, and may include a partial month for reports run mid-month.

PORTFOLIO SUMMARY AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX2811 LIBRARY COMMISSION FUNDS-GALES FERRY LIBRARY

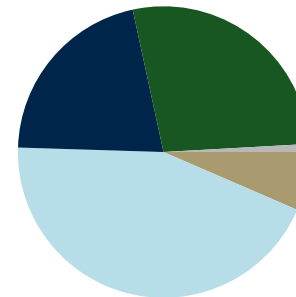
AMERICAN FUNDS

Statement of Portfolio Changes

	Quarter To Date	Year To Date	Since Inception 3/30/2022
Total Beginning Value	\$60,111	\$60,844	\$25,891
Net Deposits/Withdrawals	\$0	\$0	\$17,477
Total Earnings	\$5,448	\$4,715	\$22,191
Total Ending Value	\$65,559	\$65,559	\$65,559

Beginning/ending values and performance returns exclude assets not custodied at Janney such as annuities and certain mutual funds. Total value including these "non-performance" assets and accrued income is \$65,559

Current Asset Allocation



Calendar Year Rate of Return

	2026	2025	2024	2023	2022*	Since Inception 03/30/2022
Your Portfolio	7.75%	16.21%	10.73%	13.12%	-5.08%	9.81%

* The return reflected is for a partial year

Trailing Year Rate of Return

	Quarter To Date	Year To Date	One Year	Three Year
Your Portfolio	9.06%	7.75%	15.40%	13.73%

The returns for all periods greater than 1 year are annualized. Yearly trailing returns are calculated using 12 month periods, not actual 365 days, and may include a partial month for reports run mid-month.

PORTFOLIO SUMMARY AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX8251 LIBRARY COMMISSION FUNDS-EITHER LIBRARY

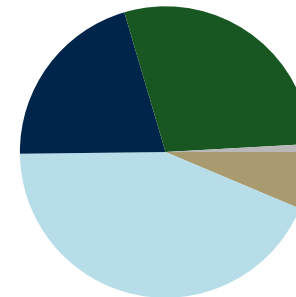
AMERICAN FUNDS

Statement of Portfolio Changes

	Quarter To Date	Year To Date	Since Inception 12/29/2016
Total Beginning Value	\$48,118	\$48,650	\$51,766
Net Deposits/Withdrawals	-\$250	-\$153	-\$34,573
Total Earnings	\$4,234	\$3,605	\$34,908
Total Ending Value	\$52,101	\$52,101	\$52,101

Beginning/ending values and performance returns exclude assets not custodied at Janney such as annuities and certain mutual funds. Total value including these "non-performance" assets and accrued income is \$52,101

Current Asset Allocation



Calendar Year Rate of Return

	2026	2025	2024	2023	2022	Since Inception 12/29/2016
Your Portfolio	7.66%	16.03%	10.53%	12.99%	-10.10%	7.95%

Trailing Year Rate of Return

	Quarter To Date	Year To Date	One Year	Three Year	Five Year	Seven Year
Your Portfolio	8.81%	7.66%	15.23%	13.55%	7.61%	8.98%

The returns for all periods greater than 1 year are annualized. Yearly trailing returns are calculated using 12 month periods, not actual 365 days, and may include a partial month for reports run mid-month.

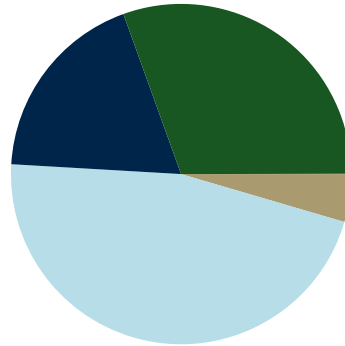
XXXX1774

THE BILL LIBRARY BUILDING FUND

COMPASS

Asset Allocation

	Market Value	%
Cash and Equivalents	\$30,314	4.5%
U.S. Equity	\$309,894	46.4%
International Equity	\$124,031	18.6%
Fixed Income	\$203,655	30.5%
Other	\$152	0.0%
Total	\$668,046	100%



Market Activity Summary

	Quarter to Date	Year to Date	Since Inception 11/26/2012
Total Beginning Value	\$612,134	\$621,824	\$269,127
Net Deposits/Withdrawals	\$0	\$0	\$27,392
Total Earnings	\$55,912	\$46,222	\$371,526
Total Ending Value	\$668,046	\$668,046	\$668,046
Performance Results			
Your Portfolio	9.13%	7.43%	6.16%

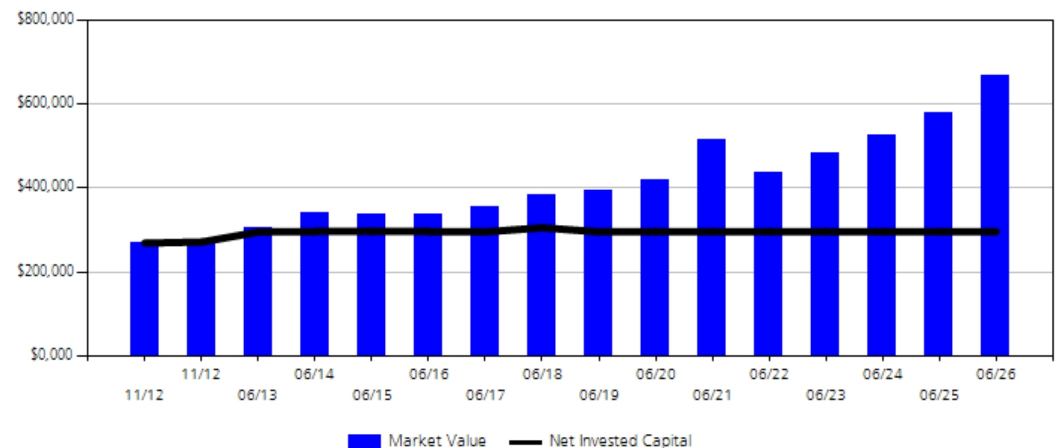
Returns shown for any period greater than 12 months are annualized

Value displayed above includes annuities but may exclude other assets not custodied at Janney such as certain m funds or insurance products. Calculation of performance returns includes the value listed above plus accrued incc value including these assets and accrued income is \$668,046

Top 10 Holdings

Ticker/Cusip	Security	Market Value	% Portfolio
XLK	ST STR TECH SEL SPDR ETF	74,684	11.2
IEI	ISHS 3-7Y TRSY BD ETF	61,779	9.2
VEU	VNGRD FTSE ALL WORLD ETF	55,108	8.2
XLF	ST STR FINL SEL SCTR ETF	52,591	7.9
VCSH	VNGRD SHRT TRM CORP ETF	49,789	7.5
IEUR	ISHS CORE MSCI EUR ETF	46,756	7.0
XLV	ST STR H/C SEL SCTR ETF	38,237	5.7
XLC	ST STR COMMN SVC SEL ETF	36,210	5.4
TLT	ISHS 20+ TRSY BD ETF	35,519	5.3
IEF	ISHS 7-10Y TRSY ETF	32,343	4.8
Total		\$483,015	72.3

Net Invested Capital



Non-performance assets are excluded from the Market Value and Net Invested Capital.

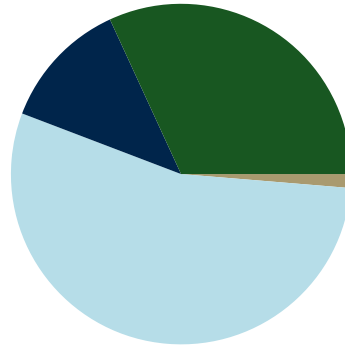
XXXX6601

THE WILLIAM HOLTON MEMORIAL FUND

COMPASS

Asset Allocation

	Market Value	%
Cash and Equivalents	\$6,812	1.3%
U.S. Equity	\$284,235	54.5%
International Equity	\$64,344	12.3%
Fixed Income	\$166,230	31.9%
Total	\$521,621	100%



Market Activity Summary

	Quarter to Date	Year to Date	Since Inception 11/23/2016
Total Beginning Value	\$494,361	\$490,509	\$1,110
Net Deposits/Withdrawals	-\$16	-\$16	\$164,173
Total Earnings	\$27,275	\$31,127	\$356,338
Total Ending Value	\$521,621	\$521,621	\$521,621

Performance Results

Your Portfolio	5.72%	6.47%	7.53%
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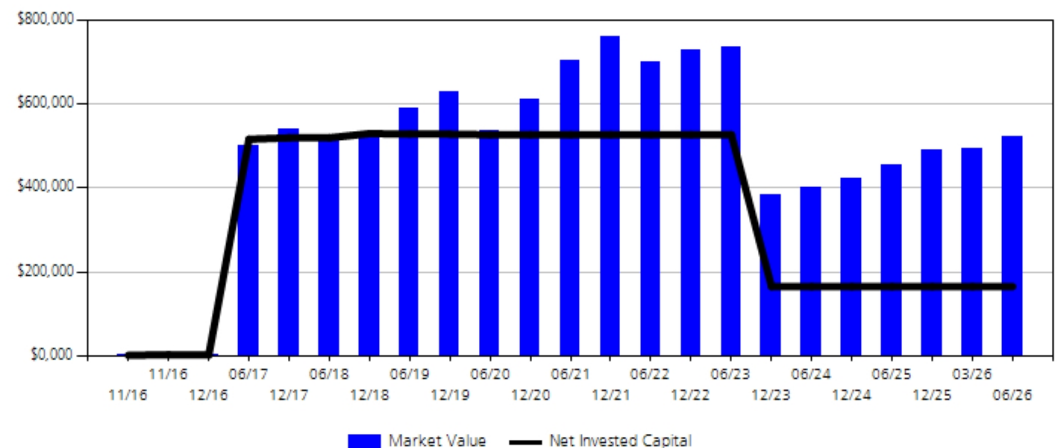
Returns shown for any period greater than 12 months are annualized

Value displayed above includes annuities but may exclude other assets not custodied at Janney such as certain m funds or insurance products. Calculation of performance returns includes the value listed above plus accrued incc value including these assets and accrued income is \$525,387

Top 10 Holdings

Ticker/Cusip	Security	Market Value	% Portfolio
AVGO	BROADCOM INC	32,487	6.2
677415CF6	OH POWER CO 6.6 021533	26,949	5.2
583334AB3	MEADWESTVACO 6.8 111532	26,194	5.0
29273VAQ3	ENERGY TRANS 5.75 021533	25,912	5.0
534187BT5	LINCOLN NATL5.852 031534	25,563	4.9
410867AH8	HANOVER INS 5.5 090135	25,222	4.8
48130CVG7	JPM MTN 5.2 112932	23,991	4.6
MS	MORGAN STANLEY	16,305	3.1
CSCO	CISCO SYSTEMS INC	15,270	2.9
NVS	NOVARTIS AG SPON ADR	14,732	2.8
Total		\$232,624	44.6

Net Invested Capital



Non-performance assets are excluded from the Market Value and Net Invested Capital.

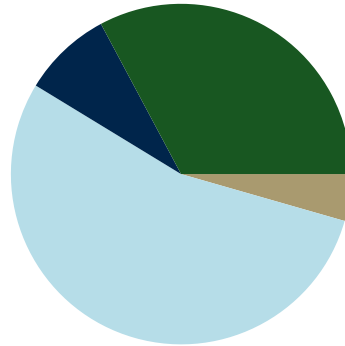
XXXX4488

THE WILLIAM HOLTON MEMORIAL FUND 2

COMPASS

Asset Allocation

	Market Value	%
Cash and Equivalents	\$22,825	4.4%
U.S. Equity	\$279,013	54.3%
International Equity	\$43,618	8.5%
Fixed Income	\$168,665	32.8%
Total	\$514,120	100%



Market Activity Summary

	Quarter to Date	Year to Date	Since Inception 11/22/2023
Total Beginning Value	\$475,078	\$469,857	\$361,665
Net Deposits/Withdrawals	-\$56	-\$56	-\$56
Total Earnings	\$39,098	\$44,319	\$152,511
Total Ending Value	\$514,120	\$514,120	\$514,120

Performance Results

Your Portfolio	8.23%	9.39%	14.55%
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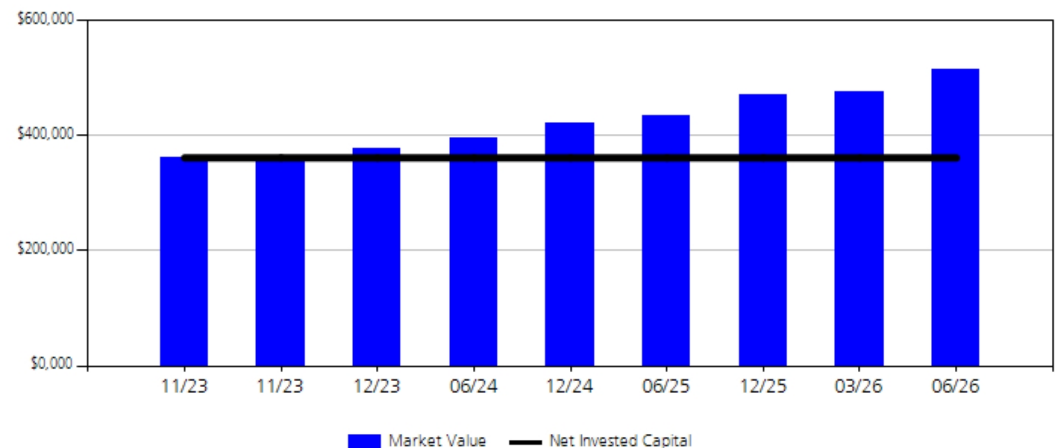
Returns shown for any period greater than 12 months are annualized

Value displayed above includes annuities but may exclude other assets not custodied at Janney such as certain m funds or insurance products. Calculation of performance returns includes the value listed above plus accrued incc value including these assets and accrued income is \$517,063

Top 10 Holdings

Ticker/Cusip	Security	Market Value	% Portfolio
251799AA0	DEVON ENERGY 7.95 041532	28,710	5.6
04686JAF8	ATHENE HLDG 6.65 020133	26,372	5.1
079860AE2	BELLSTH CORP 6.55 061534	26,260	5.1
682680BL6	ONEOK INC 6.05 090133	26,205	5.1
125523CB4	CIGNA CORP 3.4 030127	24,854	4.8
STX	SEAGATE TECH HLDGS PUB	24,125	4.7
843452AZ6	SOUTHERN NATL 8.0 030132	22,832	4.4
CSCO	CISCO SYSTEMS INC	15,975	3.1
C	CITIGROUP INC	15,955	3.1
362320BA0	GTE CORP 6.94 041528	13,433	2.6
Total		\$224,720	43.7

Net Invested Capital



Non-performance assets are excluded from the Market Value and Net Invested Capital.

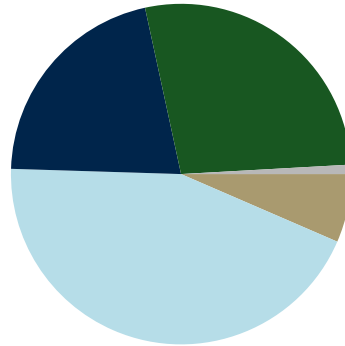
XXXX2811

LIBRARY COMMISSION FUNDS-GALES FERRY LIBRARY

AMERICAN FUNDS

Asset Allocation

	Market Value	%
Cash and Equivalents	\$4,258	6.5%
U.S. Equity	\$28,845	44.0%
International Equity	\$13,834	21.1%
Fixed Income	\$18,036	27.5%
Other	\$585	0.9%
Total	\$65,559	100%



Market Activity Summary

	Quarter to Date	Year to Date	Since Inception 3/30/2022
Total Beginning Value	\$60,111	\$60,844	\$25,891
Net Deposits/Withdrawals	\$0	\$0	\$17,477
Total Earnings	\$5,448	\$4,715	\$22,191
Total Ending Value	\$65,559	\$65,559	\$65,559
Performance Results			
Your Portfolio	9.06%	7.75%	9.81%

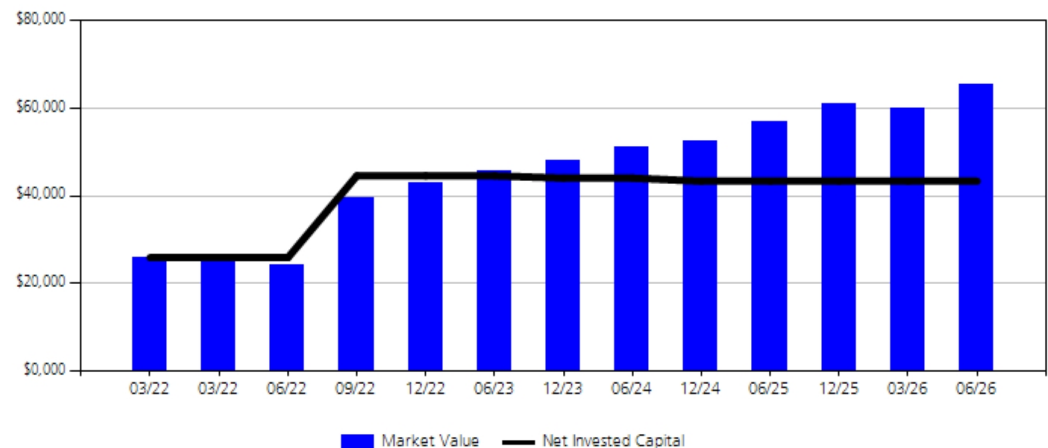
Returns shown for any period greater than 12 months are annualized

Value displayed above includes annuities but may exclude other assets not custodied at Janney such as certain m funds or insurance products. Calculation of performance returns includes the value listed above plus accrued incc value including these assets and accrued income is \$65,559

Top 10 Holdings

Ticker/Cusip	Security	Market Value	% Portfolio
AMBFX	AMR BAL F2	13,522	20.6
GBLFX	AMR GLB BAL F2	9,439	14.4
WMFFX	WASH MUT INVS F2	7,806	11.9
WGIFX	CAP WRLD GRW INC F2	7,492	11.4
AMEFX	INCOME FD OF AMER F2	6,194	9.4
SMCFX	SMALLCAP WRLD F2	3,720	5.7
ANWFX	NEW PERSP F2	3,417	5.2
MIAYX	AMR MLTISECT INCM F2	2,777	4.2
ABNFX	BOND FD OF AMER F2	2,758	4.2
ANBFX	AMR STR BD F2	2,735	4.2
Total		\$59,859	91.3

Net Invested Capital



Non-performance assets are excluded from the Market Value and Net Invested Capital.

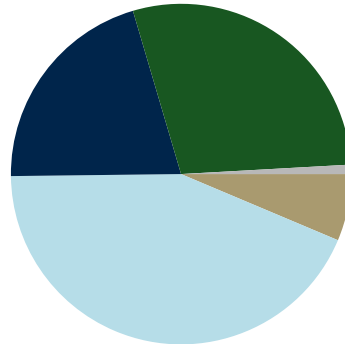
XXXX8251

LIBRARY COMMISSION FUNDS-EITHER LIBRARY

AMERICAN FUNDS

Asset Allocation

	Market Value	%
Cash and Equivalents	\$3,306	6.3%
U.S. Equity	\$22,649	43.5%
International Equity	\$10,739	20.6%
Fixed Income	\$14,942	28.7%
Other	\$465	0.9%
Total	\$52,101	100%



Market Activity Summary

	Quarter to Date	Year to Date	Since Inception 12/29/2016
Total Beginning Value	\$48,118	\$48,650	\$51,766
Net Deposits/Withdrawals	-\$250	-\$153	-\$34,573
Total Earnings	\$4,234	\$3,605	\$34,908
Total Ending Value	\$52,101	\$52,101	\$52,101
Performance Results			
Your Portfolio	8.81%	7.66%	7.95%

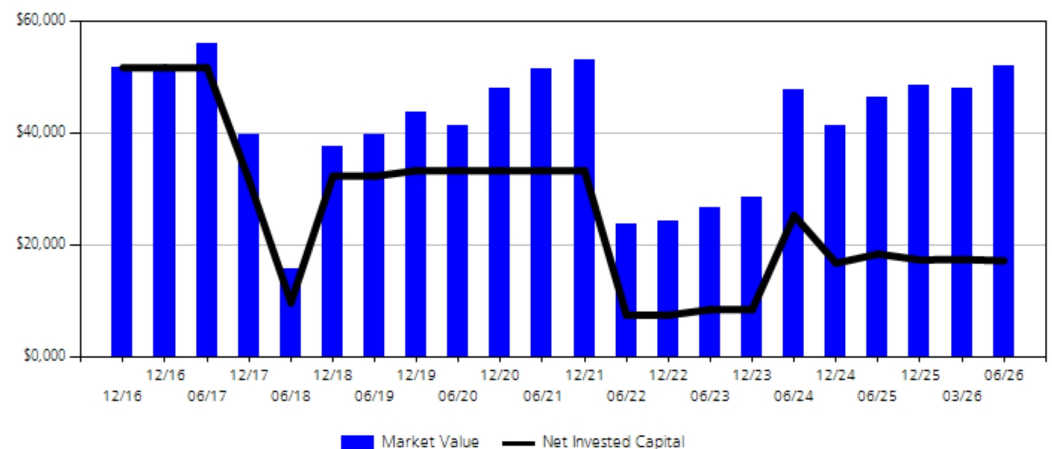
Returns shown for any period greater than 12 months are annualized

Value displayed above includes annuities but may exclude other assets not custodied at Janney such as certain m funds or insurance products. Calculation of performance returns includes the value listed above plus accrued income including these assets and accrued income is \$52,101

Top 10 Holdings

Ticker/Cusip	Security	Market Value	% Portfolio
AMBFX	AMR BAL F2	10,753	20.6
GBLFX	AMR GLB BAL F2	7,577	14.5
WMFFX	WASH MUT INVS F2	6,203	11.9
WGIFX	CAP WRLD GRW INC F2	5,527	10.6
AMEFX	INCOME FD OF AMER F2	4,940	9.5
SMCFX	SMALLCAP WRLD F2	2,820	5.4
ANWFX	NEW PERSP F2	2,663	5.1
MIAYX	AMR MLTISECT INCM F2	2,421	4.6
ABNFX	BOND FD OF AMER F2	2,390	4.6
ANBFX	AMR STR BD F2	2,374	4.6
Total		\$47,666	91.5

Net Invested Capital



Non-performance assets are excluded from the Market Value and Net Invested Capital.

HOUSEHOLD SUMMARY AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

Account No Account Name Manager Style	Total Market Value	Estimated Annual Income	Portfolio Current Yield	Performance Summary						
				Quarter to Date	Year to Date	One Year	Three Year	Five Year	Seven Year	Ten Year
THE BILL LIBRARY ASSOCIATION	\$1,821,447	\$53,037	2.9%	7.87%	7.72%	15.95%	11.85%	7.07%	8.26%	7.31%
XXXX1774 The Bill Library Building Fund COMPASS	\$668,046	\$15,678	2.3%	9.13%	7.43%	14.93%	11.24%	5.38%	7.72%	7.07%
XXXX6601 The William Holton Memorial Fund COMPASS	\$521,621	\$19,095	3.7%	5.72%	6.47%	14.92%	12.30%	8.26%	8.60%	
XXXX4488 The William Holton Memorial Fund 2 COMPASS	\$514,120	\$15,413	3.0%	8.23%	9.39%	18.52%				
XXXX2811 Library Commission Funds-Gales Ferry Library AMERICAN FUNDS AF Moderate Growth & Income	\$65,559	\$1,575	2.4%	9.06%	7.75%	15.40%	13.73%			
XXXX8251 Library Commission Funds-Either Library AMERICAN FUNDS AF Moderate Growth & Income	\$52,101	\$1,275	2.4%	8.81%	7.66%	15.23%	13.55%	7.61%	8.98%	

The returns for all periods greater than 1 year are annualized. Yearly trailing returns are calculated using 12 month periods, not actual 365 days, and may include a partial month for reports run mid-month.

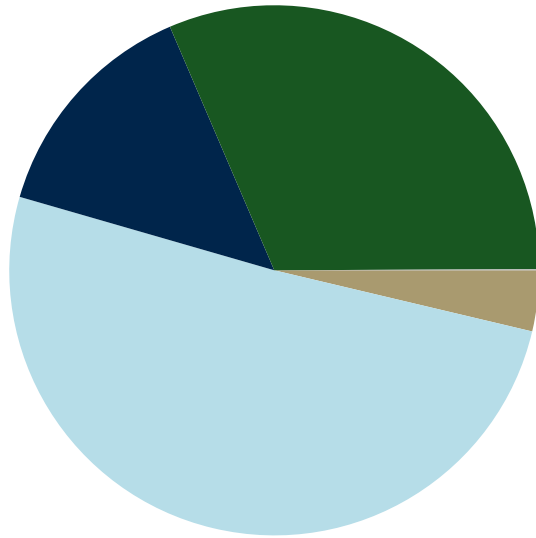
ASSET ALLOCATION AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

Broad Asset Allocation



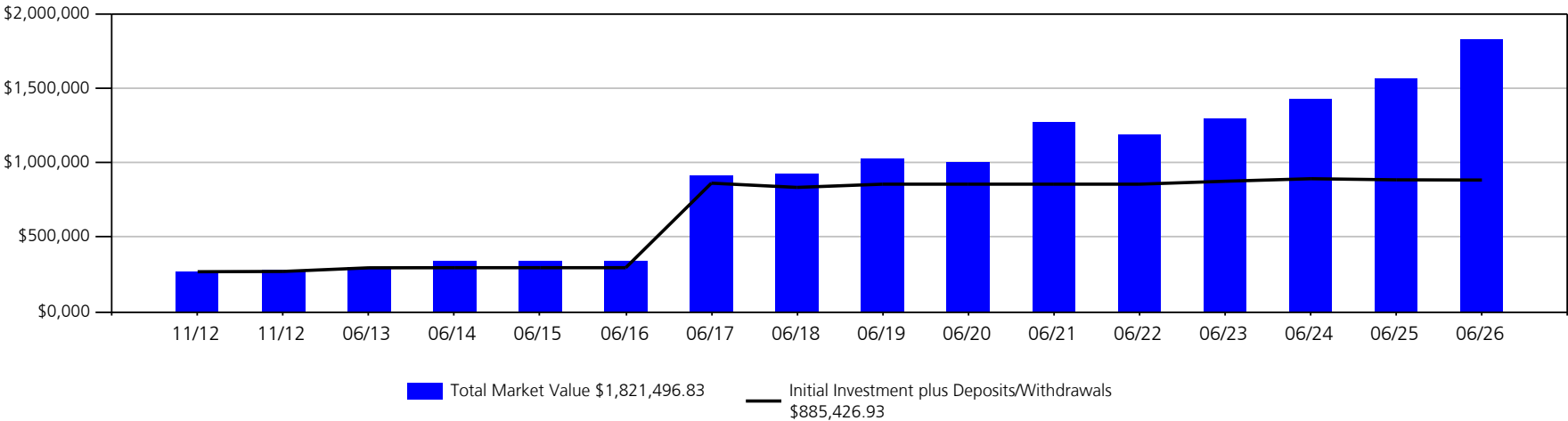
■ Cash and Equivalents	3.7%
■ U.S. Equity	50.8%
■ International Equity	14.1%
■ Fixed Income	31.4%
■ Other	0.1%

Detailed Asset Allocation

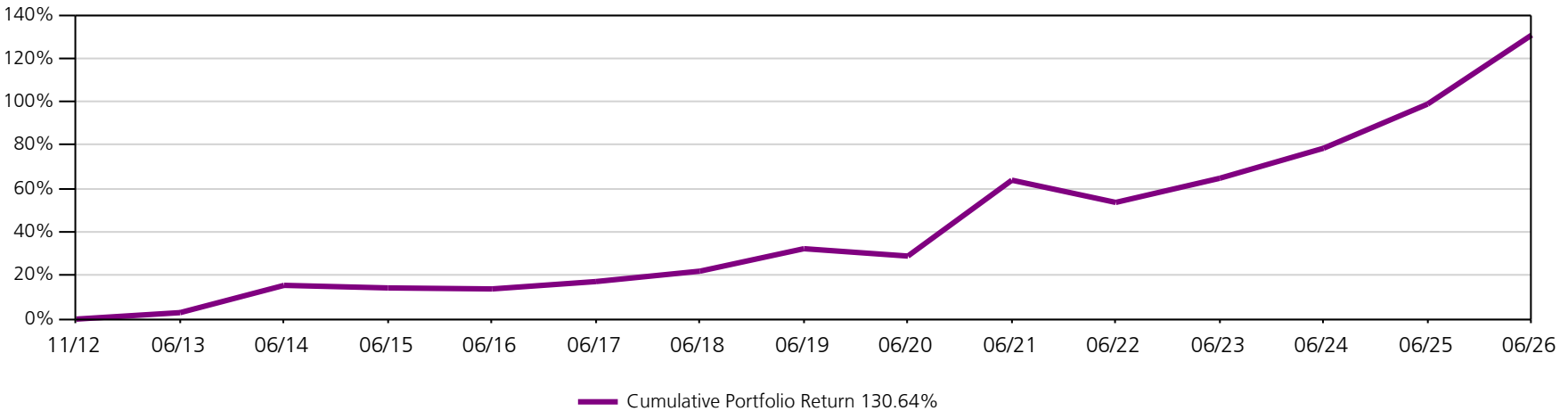
	Market Value	% of Asset Class	% of Total Portfolio
Cash and Equivalents	\$67,514	100.0	3.7
Cash	23,735	35.2	1.3
Cash and Equivalents	33,662	49.9	1.8
Cash held in Mutual Funds, ETFs, and UITs	10,116	15.0	0.6
Equity - U.S. & International	\$1,181,202	100.0	64.8
Large Cap	882,850	74.7	48.5
Mid Cap	236,394	20.0	13.0
Small Cap	60,446	5.1	3.3
Equity Mutual Funds, ETFs, and UITs	2	0.0	0.0
Other	1,510	0.1	0.1
Fixed Income	\$571,528	100.0	31.4
Corporate Debt - Domestic Investment Grade	334,895	58.6	18.4
Fixed Income Mutual Funds, ETFs, and UITs	236,633	41.4	13.0
Other	\$1,202	100.0	0.1
Other Mutual Funds, ETFs, and UITs	1,202	100.0	0.1
Total Asset Allocation	\$1,821,446		



Net Invested Capital



Cumulative Portfolio Results



Non-performance assets are excluded from the Portfolio Growth Market Values and from the Cumulative Portfolio Return.

EQUITY ANALYSIS AS OF JUNE 30, 2026

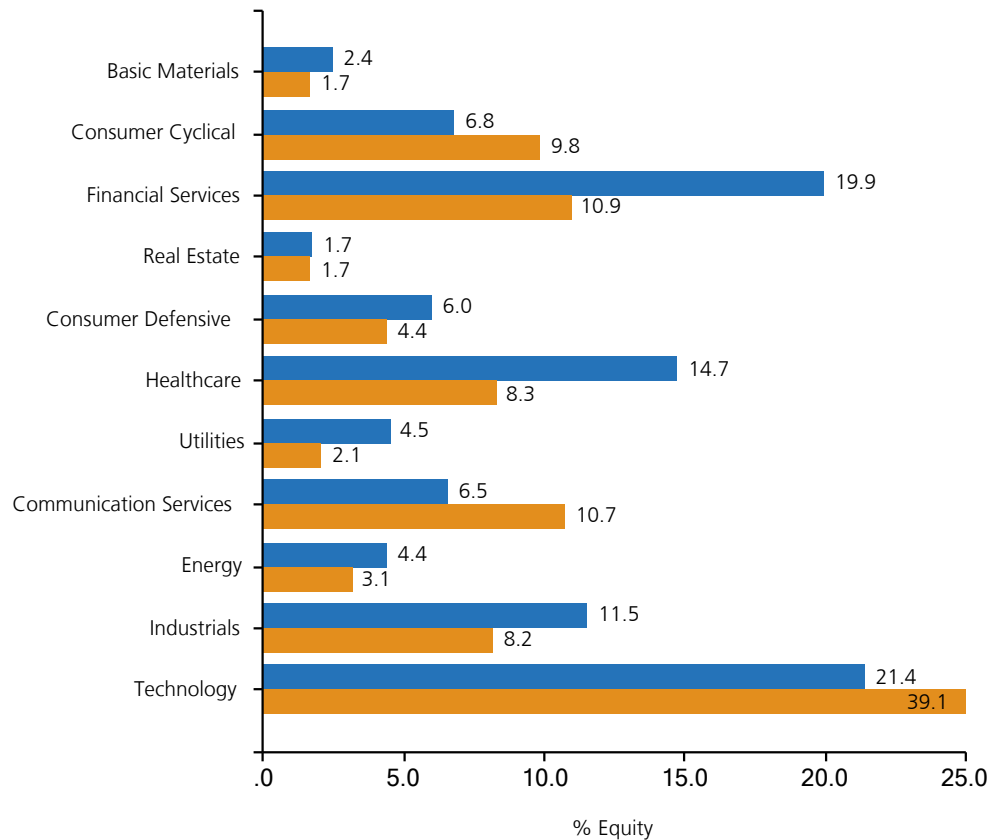
THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

Morningstar Equity Sector Weightings

Account S&P 500



Top Equity Holdings

Security	Symbol Cusip	% Equity	% Portfolio	Market Value
ST STR TECH SEL SPDR ETF	XLK	6.4	4.1	74,684
VNGRD FTSE ALL WORLD ETF	VEU	4.7	3.0	55,108
ST STR FINL SEL SCTR ETF	XLF	4.5	2.9	52,591
ISHS CORE MSCI EUR ETF	IEUR	4.0	2.6	46,756
ST STR H/C SEL SCTR ETF	XLV	3.3	2.1	38,237
ST STR COMMN SVC SEL ETF	XLC	3.1	2.0	36,210
BROADCOM INC	AVGO	2.8	1.8	32,487
CISCO SYSTEMS INC	CSCO	2.7	1.7	31,244
CITIGROUP INC	C	2.5	1.6	28,972
ISHS CORE S&P SMCP ETF	IJR	2.1	1.4	24,619
Total		36.1	23.1	\$420,908

PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX1774 THE BILL LIBRARY BUILDING FUND

Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
CASH AND EQUIVALENTS									
Liquid Asset									
Cash				26,002	26,002		1.55	403	3.89
Total Liquid Asset				26,002	26,002			403	3.89
TOTAL CASH AND EQUIVALENTS				26,002	26,002			403	3.89
EQUITY									
Consumer Cyclical									
State Street Consumer Discretionary Select Sector SPDR ETF	XLY	110	117.28	9,033	12,901	3,868	0.76	98	1.93
Total Consumer Cyclical				9,033	12,901	3,868	0.76	98	1.93
Financial Services									
State Street Financial Select Sector Spdr ETF	XLF	981	53.61	47,524	52,591	5,068	1.47	777	7.87
Total Financial Services				47,524	52,591	5,068	1.48	777	7.87
Consumer Defensive									
State Street Consumer Staples Select Sector SPDR ETF	XLP	163	83.07	12,789	13,540	751	2.64	355	2.03
Total Consumer Defensive				12,789	13,540	751	2.62	355	2.03
Healthcare									
Ishares Biotechnology ETF	IBB	74	190.19	12,691	14,074	1,383	0.22	29	2.11
State Street Healthcare Select Sector Spdr ETF	XLV	241	158.66	33,211	38,237	5,026	1.59	604	5.72
Total Healthcare				45,902	52,311	6,409	1.21	633	7.83
Utilities									
State Street Utils Select Sector SPDR ETF	XLU	292	45.34	12,236	13,239	1,003	2.67	347	1.98
Total Utilities				12,236	13,239	1,003	2.62	347	1.98
Industrials									
Ishares U S Transportation ETF	IYT	177	86.75	13,351	15,355	2,004	1.46	225	2.30
Total Industrials				13,351	15,355	2,004	1.47	225	2.30

PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX1774 THE BILL LIBRARY BUILDING FUND									
Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
Technology									
State Street Technology Select Sector SPDR ETF	XLK	392	190.52	22,293	74,684	52,390	0.43	299	11.18
Total Technology				22,293	74,684	52,390	0.40	299	11.18
Equity Mutual Funds, ETFs, and UITs									
Ishares Core Msci Europe ETF	IEUR	622	75.17	41,254	46,756	5,502	3.21	1,312	7.00
Ishares Core S&P Small Cap ETF	IJR	166	148.31	21,020	24,619	3,599	1.11	265	3.69
Ishares Expanded Tech Sector ETF	IGM	97	163.58	11,433	15,867	4,434	0.14	20	2.38
Ishares Msci Emerging Markets Asia ETF	EEMA	101	116.96	8,688	11,813	3,125	1.35	140	1.77
State Street Communication Services Select Sector SPDR ETF	XLC	338	107.13	25,448	36,210	10,762	1.30	484	5.42
Vanguard Ftse All World Ex Us ETF	VEU	658	83.75	38,167	55,108	16,940	2.56	1,443	8.25
Vanguard Ftse Pacific ETF	VPL	98	115.69	7,182	11,338	4,156	2.68	315	1.70
Total Equity Mutual Funds, ETFs, and UITs				153,192	201,710	48,518	1.97	3,980	30.19
TOTAL EQUITY				316,321	436,332	120,011	1.54	6,715	65.31
FIXED INCOME									
Fixed Income Mutual Funds, ETFs, and UITs									
Ishares 20+ Yr Treasury Bond ETF	TLT	411	86.42	40,560	35,519	-5,042	4.58	1,602	5.32
Ishares 3-7Yr Treasury Bond ETF	IEI	526	117.45	60,253	61,779	1,526	3.65	2,239	9.25
Ishares 7-10Yr Treasury Bond ETF	IEF	342	94.57	32,343	32,343	0	3.90	1,252	4.84
Vanguard Intermediate Term Corp Bond ETF	VCIT	318	82.65	29,958	26,283	-3,675	4.82	1,256	3.93
Vanguard Short Term Corp Bond ETF	VCSH	630	79.03	49,191	49,789	597	4.46	2,211	7.45
Total Fixed Income Mutual Funds, ETFs, and UITs				212,306	205,712	-6,594	4.16	8,560	30.79
TOTAL FIXED INCOME				212,306	205,712	-6,594	4.16	8,560	30.79
TOTAL HOLDINGS				\$554,629	\$668,046	\$113,417	2.35	\$15,678	100.00

PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX6601 THE WILLIAM HOLTON MEMORIAL FUND

Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
CASH AND EQUIVALENTS									
Liquid Asset									
Cash				2,616	2,616		1.55	41	0.50
Federated Hermes U S Treasury Cash Reserves Instl CI	UTIXX	4,196	1.00	4,196	4,196	0	3.57	150	0.80
Total Liquid Asset				6,812	6,812			190	1.31
TOTAL CASH AND EQUIVALENTS				6,812	6,812			190	1.31
EQUITY									
Basic Materials									
Dow Inc	DOW	41	27.36	2,494	1,122	-1,372	5.18	57	0.22
Total Basic Materials				2,494	1,122	-1,372	5.12	57	0.22
Consumer Cyclical									
Genuine Parts Co	GPC	59	117.98	6,334	6,961	627	3.62	251	1.33
Lowes Companies Inc	LOW	28	220.49	5,790	6,174	384	2.25	140	1.18
Restaurant Brands Intl Inc	QSR	48	72.51	3,562	3,480	-81	3.64	125	0.67
Total Consumer Cyclical				15,685	16,615	930	3.10	516	3.19
Financial Services									
Bank of America Corp	BAC	208	56.98	6,016	11,852	5,836	1.92	233	2.27
Chubb Ltd	CB	21	340.74	2,783	7,156	4,373	1.16	86	1.37
Citigroup Inc	C	93	139.96	6,231	13,016	6,785	1.71	223	2.50
Jpmorgan Chase & Co	JPM	41	327.33	4,687	13,421	8,734	1.80	246	2.57
Morgan Stanley	MS	78	209.04	7,793	16,305	8,512	1.89	312	3.13
Travelers Cos Inc	TRV	22	330.12	2,816	7,263	4,447	1.49	110	1.39
Truist Financial Corp	TFC	184	49.82	8,106	9,167	1,061	4.09	383	1.76
Total Financial Services				38,431	78,179	39,748	2.04	1,593	14.99
Real Estate									
Healthpeak Pptys Inc	DOC	232	21.40	6,720	4,965	-1,755	5.64	283	0.95

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PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX6601 THE WILLIAM HOLTON MEMORIAL FUND

Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
Vici Properties Inc	VICI	159	26.55	4,650	4,221	-429	6.85	286	0.81
Total Real Estate				11,370	9,186	-2,184	6.20	569	1.76
Consumer Defensive									
Altria Group Inc	MO	67	71.95	4,626	4,821	194	5.93	284	0.92
Diageo Plc Spon Adr	DEO	21	80.38	2,502	1,688	-814	4.12	68	0.32
Philip Morris Intl Inc	PM	61	180.91	6,222	11,036	4,814	3.31	359	2.12
Target Corp	TGT	32	130.61	4,592	4,180	-413	3.56	148	0.80
Unilever Plc Spon Adr	UL	105	60.12	6,312	6,313	1	3.74	239	1.21
Total Consumer Defensive				24,254	28,036	3,782	3.92	1,099	5.37
Healthcare									
Becton Dickinson & Co	BDX	31	151.33	4,749	4,691	-58	2.75	130	0.90
Johnson & Johnson	JNJ	49	253.97	8,066	12,445	4,379	2.11	263	2.39
Medtronic Plc	MDT	99	78.23	9,760	7,745	-2,015	3.64	285	1.48
Merck & Company Inc	MRK	60	128.50	3,600	7,710	4,110	2.71	204	1.48
Novartis Ag Spon Adr	NVS	94	156.72	7,059	14,732	7,672	3.08	446	2.82
Pfizer Inc	PFE	278	24.08	8,209	6,694	-1,515	7.20	478	1.28
Unitedhealth Group Inc	UNH	18	415.63	6,045	7,481	1,436	2.18	167	1.43
Waters Corp	WAT	4	375.04	1,281	1,500	219	0.00	0	0.29
Total Healthcare				48,769	62,998	14,229	3.13	1,973	12.08
Utilities									
Duke Energy Corp	DUK	85	126.58	7,973	10,759	2,787	3.39	362	2.06
Nextera Energy Inc	NEE	85	87.77	2,992	7,460	4,468	2.89	212	1.43
Total Utilities				10,965	18,220	7,255	3.15	574	3.49
Communication Services									
At&T Inc	T	186	20.70	4,741	3,850	-891	5.42	206	0.74
Bce Inc	BCE	117	21.51	5,372	2,517	-2,855	5.87	149	0.48

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PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX6601 THE WILLIAM HOLTON MEMORIAL FUND

Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
Comcast Corp Cl A	CMCSA	82	24.55	3,094	2,013	-1,081	5.56	108	0.39
Crown Castle Inc	CCI	42	75.73	3,825	3,181	-644	5.55	179	0.61
Versant Media Group Inc Cl A	VSNT	3	36.01	163	108	-55	4.13	5	0.02
Total Communication Services				17,195	11,669	-5,526	5.54	646	2.24
Energy									
Chevron Corp	CVX	37	165.76	3,633	6,133	2,500	4.30	263	1.18
Conocophillips	COP	42	103.96	2,149	4,366	2,218	3.26	141	0.84
Exxon Mobil Corp	XOM	65	136.72	3,932	8,887	4,955	3.02	268	1.70
Total Energy				9,713	19,386	9,673	3.47	672	3.72
Industrials									
3M Company	MMM	34	161.91	4,265	5,505	1,240	1.95	106	1.06
General Dynamics Corp	GD	17	354.24	3,344	6,022	2,678	1.75	108	1.15
Johnson Controls Intl Plc	JCI	79	146.11	3,129	11,543	8,414	1.10	126	2.21
Rtx Corp	RTX	45	189.73	3,469	8,538	5,069	1.52	131	1.64
Siemens A G Spon Adr	SIEGY	57	160.91	3,853	9,172	5,319	1.50	133	1.76
United Parcel Service Inc Cl B	UPS	36	107.50	6,844	3,870	-2,974	5.99	236	0.74
Total Industrials				24,903	44,649	19,746	1.88	841	8.56
Technology									
Broadcom Inc	AVGO	86	377.75	4,050	32,487	28,436	0.70	224	6.23
Cisco Systems Inc	CSCO	130	117.46	6,506	15,270	8,764	1.44	218	2.93
Microsoft Corp	MSFT	13	373.02	2,584	4,849	2,266	0.95	47	0.93
Qualcomm Inc	QCOM	32	184.79	5,130	5,913	784	2.02	118	1.13
Total Technology				18,269	58,519	40,250	1.04	607	11.22
TOTAL EQUITY				222,049	348,579	126,530	2.62	9,147	66.82

PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX6601 THE WILLIAM HOLTON MEMORIAL FUND

Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
FIXED INCOME									
Corporate Debt - Domestic Investment Grade									
Gte Corp Debenture Coupon:6.940% Maturity Date:2028-04-15362320BA0		12,000	103.33	12,532	12,400	-133	6.72	833	2.38
Meadwestvaco Corp Bonds Coupon:6.800% Maturity Date: 2032-11-15 583334AB3		25,000	104.77	26,783	26,194	-590	6.50	1,700	5.02
Jpmorgan Chase & Co Unsecd Medium Term Note Coupon:5.200% Maturity Date:2032-11-29 48130CVG7		25,000	95.97	24,938	23,991	-946	5.43	1,300	4.60
Energy Transfer Lp Sr Note Coupon:5.750% Maturity Date:2033-29273VAQ3 02-15		25,000	103.65	25,496	25,912	416	5.56	1,438	4.97
Ohio Pwr Co Sr Note Ser E Coupon:6.600% Maturity Date:2033-677415CF6 02-15		25,000	107.80	26,772	26,949	177	6.14	1,650	5.17
Lincoln Natl Corp Ind Sr Note Coupon:5.852% Maturity Date:2034-03-15 534187BT5		25,000	102.25	26,141	25,563	-578	5.74	1,463	4.90
Hanover Ins Grp Inc Sr Note Coupon:5.500% Maturity Date:2035-09-01 410867AH8		25,000	100.89	25,287	25,222	-64	5.47	1,375	4.84
Total Corporate Debt - Domestic Investment Grade				167,949	166,230	-1,719	5.87	9,758	31.87
TOTAL FIXED INCOME				167,949	166,230	-1,719	5.87	9,758	31.87
TOTAL HOLDINGS				\$396,809	\$521,621	\$124,811	3.66	\$19,095	100.00

PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX4488 THE WILLIAM HOLTON MEMORIAL FUND 2									
Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
CASH AND EQUIVALENTS									
Liquid Asset									
Cash				3,261	3,261		1.55	51	0.63
Federated Hermes U S Treasury Cash Reserves Instl CI	UTIXX	19,540	1.00	19,540	19,540	0	3.57	698	3.80
Total Liquid Asset				22,800	22,800			748	4.43
TOTAL CASH AND EQUIVALENTS				22,800	22,800			748	4.43
EQUITY									
Basic Materials									
Corteva Inc	CTVA	65	84.69	4,124	5,505	1,381	0.86	47	1.07
Freeport Mcmoran Inc	FCX	134	62.89	5,583	8,427	2,844	0.99	80	1.64
Total Basic Materials				9,707	13,932	4,225	0.91	127	2.71
Consumer Cyclical									
Amazon.Com Inc	AMZN	38	238.34	5,704	9,057	3,352	0.00	0	1.76
General Motors Co	GM	90	77.08	6,025	6,937	912	0.95	65	1.35
Hilton Worldwide Holdings Inc	HLT	25	330.46	6,774	8,262	1,488	0.18	15	1.61
Pultegroup Inc	PHM	44	137.21	5,319	6,037	718	0.78	46	1.17
Total Consumer Cyclical				23,822	30,293	6,471	0.41	126	5.89
Financial Services									
Allstate Corp	ALL	23	237.94	4,806	5,473	666	1.78	99	1.06
American Intl Group Inc	AIG	58	74.53	4,579	4,323	-256	2.61	116	0.84
Apollo Global Management Inc	APO	34	118.31	4,227	4,023	-204	1.90	77	0.78
Bank of America Corp	BAC	154	56.98	7,947	8,775	828	1.92	172	1.71
Blackrock Fdg Inc	BLK	5	961.56	5,623	4,808	-815	2.34	115	0.94
Capital One Financial Corp	COF	33	200.62	7,250	6,620	-630	1.56	106	1.29
Citigroup Inc	C	114	139.96	11,027	15,955	4,928	1.71	274	3.10
Goldman Sachs Group Inc	GS	6	1,011.37	4,501	6,068	1,567	1.77	108	1.18

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PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX4488		THE WILLIAM HOLTON MEMORIAL FUND 2							
Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
Schwab Charles Corp	SCHW	70	92.27	6,630	6,459	-171	1.34	90	1.26
Total Financial Services				56,590	62,504	5,914	1.85	1,156	12.16
Real Estate									
Prologis Inc	PLD	43	135.47	5,398	5,825	427	3.04	179	1.13
Total Real Estate				5,398	5,825	427	3.07	179	1.13
Consumer Defensive									
Bjs Wholesale Club Holdings Inc	BJ	36	87.22	3,346	3,140	-206	0.00	0	0.61
Coca-Cola Company	KO	112	81.27	7,824	9,102	1,278	2.61	237	1.77
Walmart Inc	WMT	36	113.26	3,813	4,077	265	0.91	36	0.79
Total Consumer Defensive				14,982	16,320	1,337	1.67	273	3.17
Healthcare									
Astrazeneca Plc	AZN	31	189.62	5,170	5,878	709	1.74	99	1.14
Mckesson Corp	MCK	10	755.60	7,965	7,556	-409	0.43	33	1.47
Novo Nordisk As Adr	NVO	57	47.94	3,044	2,733	-312	3.69	103	0.53
Regeneron Pharmaceuticals Inc	REGN	7	623.54	4,027	4,365	338	0.60	26	0.85
Sanofi Spon Adr	SNY	92	42.66	4,619	3,925	-695	4.24	162	0.76
Thermo Fisher Scientific Inc	TMO	13	501.36	7,360	6,518	-842	0.37	24	1.27
Unitedhealth Group Inc	UNH	13	415.63	4,666	5,403	738	2.18	121	1.05
Total Healthcare				36,851	36,377	-474	1.56	568	7.08
Utilities									
Nextera Energy Inc	NEE	70	87.77	5,808	6,144	336	2.89	175	1.20
Nrg Energy Inc	NRG	20	146.06	3,250	2,921	-329	1.35	38	0.57
Ppl Corp	PPL	130	36.35	4,889	4,726	-163	3.20	148	0.92
Total Utilities				13,946	13,791	-156	2.62	361	2.68
Communication Services									
Alphabet Inc Cl A	GOOGL	29	357.37	4,079	10,364	6,285	0.24	26	2.02

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PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX4488		THE WILLIAM HOLTON MEMORIAL FUND 2							
Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
Charter Communications Inc New Cl A	CHTR	6	142.21	1,467	853	-614	0.00	0	0.17
T-Mobile Us Inc	TMUS	18	167.73	3,922	3,019	-903	2.36	73	0.59
Total Communication Services				9,468	14,236	4,768	0.70	99	2.77
Energy									
Conocophillips	COP	48	103.96	4,351	4,990	639	3.26	161	0.97
Exxon Mobil Corp	XOM	75	136.72	8,727	10,254	1,527	3.02	309	1.99
Valero Energy Corp	VLO	21	260.44	3,615	5,469	1,854	1.78	101	1.06
Total Energy				16,693	20,713	4,020	2.76	571	4.03
Industrials									
Fedex Corp	FDX	21	313.13	5,058	6,576	1,518	1.55	102	1.28
Fedex Freight Holding Co Inc	FDXF	10	151.00	0	1,510		0.00	0	0.29
Ingersoll Rand Inc	IR	50	81.99	3,972	4,100	128	0.10	4	0.80
Johnson Controls Intl Plc	JCI	47	146.11	5,170	6,867	1,697	1.10	75	1.34
Northrop Grumman Corp	NOC	10	509.31	6,061	5,093	-968	1.90	99	0.99
Southwest Airlines Co	LUV	205	51.42	6,426	10,541	4,115	1.43	148	2.05
United Rentals Inc	URI	5	1,132.89	4,581	5,664	1,084	0.71	39	1.10
Total Industrials				31,267	40,351	7,574	1.16	467	7.85
Technology									
Advanced Micro Devices Inc	AMD	15	580.91	6,260	8,714	2,453	0.00	0	1.69
Cisco Systems Inc	CSCO	136	117.46	9,630	15,975	6,344	1.44	228	3.11
Microsoft Corp	MSFT	16	373.02	8,366	5,968	-2,398	0.95	58	1.16
Qualcomm Inc	QCOM	26	184.79	4,536	4,805	268	2.02	96	0.93
Seagate Technology Holdings Public Ltd Co	STX	25	965.00	5,618	24,125	18,507	0.32	74	4.69
Total Technology				34,411	59,586	25,176	0.77	456	11.59
Equity Mutual Funds, ETFs, and UITs									
Ishares Russell 1000 Value ETF	IWD	36	242.43	7,737	8,727	991	1.44	129	1.70

See important disclosures at the end of this report. This report is not complete without all pages.

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PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX4488		THE WILLIAM HOLTON MEMORIAL FUND 2							
Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
Total Equity Mutual Funds, ETFs, and UITs				7,737	8,727	991	1.48	129	1.70
TOTAL EQUITY				260,872	322,655	60,273	1.40	4,512	62.76
FIXED INCOME									
Corporate Debt - Domestic Investment Grade									
Cigna Corp New Unsecd Note Coupon:3.400% Maturity Date:2027-03-01	125523CB4	25,000	99.42	24,438	24,854	416	3.42	850	4.83
Gte Corp Debenture Coupon:6.940% Maturity Date:2028-04-15	362320BA0	13,000	103.33	13,577	13,433	-144	6.72	902	2.61
Southern Nat Gas CO Llc Note Coupon:8.000% Maturity Date:2032-03-01	843452AZ6	20,000	114.16	22,447	22,832	385	7.03	1,600	4.44
Devon Energy Corp Sr Debenture Coupon:7.950% Maturity Date:2032-04-15	251799AA0	25,000	114.84	27,743	28,710	967	6.94	1,988	5.58
Athene Hldg Ltd Sr Note Coupon:6.650% Maturity Date:2033-02-01	04686JAF8	25,000	105.49	27,104	26,372	-732	6.32	1,663	5.13
Oneok Inc Sr Note Coupon:6.050% Maturity Date:2033-09-01	682680BL6	25,000	104.82	25,781	26,205	424	5.79	1,513	5.10
Bellsouth Corp Debenture Coupon:6.550% Maturity Date:2034-06-15	079860AE2	25,000	105.04	26,388	26,260	-128	6.25	1,638	5.11
Total Corporate Debt - Domestic Investment Grade				167,478	168,665	1,187	6.02	10,152	32.81
TOTAL FIXED INCOME				167,478	168,665	1,187	6.02	10,152	32.81
TOTAL HOLDINGS				\$451,150	\$514,120	\$61,460	3.00	\$15,413	100.00

PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX2811 LIBRARY COMMISSION FUNDS-GALES FERRY LIBRARY

Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
CASH AND EQUIVALENTS									
Liquid Asset									
Cash				1,047	1,047		1.55	16	1.60
Total Liquid Asset				1,047	1,047			16	1.60
TOTAL CASH AND EQUIVALENTS				1,047	1,047			16	1.60
EQUITY									
Equity Mutual Funds, ETFs, and UITs									
Capital World Growth & Income CI F2	WGIFX	92	81.56	5,163	7,492	2,329	1.60	119	11.43
Growth Fund of America CI F2	GFFFX	23	87.74	1,929	2,006	77	0.44	9	3.06
Income Fund of America CI F2	AMEFX	227	27.28	5,551	6,194	643	3.78	234	9.45
New Perspective CI F2	ANWFX	45	75.21	2,479	3,417	937	1.18	40	5.21
New World CI F2	NFFFX	12	108.27	1,286	1,350	64	1.19	16	2.06
Smallcap World CI F2	SMCFX	42	88.77	2,669	3,720	1,051	0.79	30	5.67
Washington Mutual Investors CI F2	WMFFX	117	66.80	6,588	7,806	1,218	1.42	115	11.91
Total Equity Mutual Funds, ETFs, and UITs				25,666	31,984	6,319	1.76	563	48.79
TOTAL EQUITY				25,666	31,984	6,319	1.76	563	48.79
FIXED INCOME									
Fixed Income Mutual Funds, ETFs, and UITs									
American Emerging Markets Bond CI F2	EBNFX	159	8.15	1,286	1,297	11	6.24	81	1.98
American Multisector Income CI F2	MIAYX	297	9.35	2,690	2,777	88	6.32	175	4.24
American Strategic Bond CI F2	ANBFX	302	9.06	2,967	2,735	-232	4.30	114	4.17
Bond Fund of America CI F2	ABNFX	245	11.26	2,910	2,758	-151	4.39	121	4.21
Total Fixed Income Mutual Funds, ETFs, and UITs				9,852	9,567	-285	5.13	491	14.59
TOTAL FIXED INCOME				9,852	9,567	-285	5.13	491	14.59

PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX2811 LIBRARY COMMISSION FUNDS-GALES FERRY LIBRARY									
Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
BALANCED									
Balanced Mutual Funds, ETFs, and UITs									
American Balanced CI F2	AMBFX	330	41.00	10,319	13,522	3,204	2.05	274	20.63
American Global Balanced CI F2	GBLFX	223	42.27	7,694	9,439	1,744	2.28	231	14.40
Total Balanced Mutual Funds, ETFs, and UITs				18,013	22,961	4,948	2.20	505	35.02
TOTAL BALANCED				18,013	22,961	4,948	2.20	505	35.02
TOTAL HOLDINGS				\$54,577	\$65,559	\$10,982	2.40	\$1,575	100.00

PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX8251 LIBRARY COMMISSION FUNDS-EITHER LIBRARY									
Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
CASH AND EQUIVALENTS									
Liquid Asset									
Cash				738	738		1.55	11	1.42
Total Liquid Asset				738	738			11	1.42
TOTAL CASH AND EQUIVALENTS				738	738			11	1.42
EQUITY									
Equity Mutual Funds, ETFs, and UITs									
Capital World Growth & Income CI F2	WGIFX	68	81.56	4,056	5,527	1,471	1.60	88	10.61
Growth Fund of America CI F2	GFFFX	18	87.74	1,533	1,594	61	0.44	7	3.06
Income Fund of America CI F2	AMEFX	181	27.28	4,373	4,940	567	3.78	187	9.48
New Perspective CI F2	ANWFX	35	75.21	2,042	2,663	621	1.18	31	5.11
New World CI F2	NFFFX	10	108.27	1,022	1,073	51	1.19	13	2.06
Smallcap World CI F2	SMCFX	32	88.77	2,101	2,820	719	0.79	23	5.41
Washington Mutual Investors CI F2	WMFFX	93	66.80	5,597	6,203	605	1.42	91	11.90
Total Equity Mutual Funds, ETFs, and UITs				20,724	24,819	4,095	1.77	440	47.63
TOTAL EQUITY				20,724	24,819	4,095	1.77	440	47.63
FIXED INCOME									
Fixed Income Mutual Funds, ETFs, and UITs									
American Emerging Markets Bond CI F2	EBNFX	126	8.15	1,022	1,031	9	6.24	64	1.98
American Multisector Income CI F2	MIAYX	259	9.35	2,385	2,421	36	6.32	153	4.65
American Strategic Bond CI F2	ANBFX	262	9.06	2,446	2,374	-72	4.30	99	4.56
Bond Fund of America CI F2	ABNFX	212	11.26	2,442	2,390	-53	4.39	105	4.59
Total Fixed Income Mutual Funds, ETFs, and UITs				8,296	8,215	-81	5.12	420	15.77
TOTAL FIXED INCOME				8,296	8,215	-81	5.12	420	15.77

PORTFOLIO HOLDINGS BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

XXXX8251 LIBRARY COMMISSION FUNDS-EITHER LIBRARY									
Security Description	Symbol Cusip	Units	Market Price	Total Cost	Market Value	Unrealized Gain/Loss	Yield (%)	Est Annual Income	% Holdings
BALANCED									
Balanced Mutual Funds, ETFs, and UITs									
American Balanced CI F2	AMBFX	262	41.00	8,754	10,753	1,999	2.05	218	20.64
American Global Balanced CI F2	GBLFX	179	42.27	6,431	7,577	1,146	2.28	186	14.54
Total Balanced Mutual Funds, ETFs, and UITs				15,185	18,330	3,144	2.20	404	35.18
TOTAL BALANCED				15,185	18,330	3,144	2.20	404	35.18
TOTAL HOLDINGS				\$44,942	\$52,101	\$7,159	2.45	\$1,275	100.00

ESTIMATED MONTHLY INCOME BY ACCOUNT AS OF JUNE 30, 2026

THE BILL LIBRARY ASSOCIATION



Account HH00054479-1

Account Name													
Account Type													
Account Number	07/26	08/26	09/26	10/26	11/26	12/26	01/27	02/27	03/27	04/27	05/27	06/27	Total
The William Holton Memorial Fund													
Non-Profit Account													
XXXX6601	742	1,851	2,543	1,159	2,457	1,158	742	1,983	2,543	1,159	1,602	1,158	19,095
The Bill Library Building Fund													
Non-Profit Account													
XXXX1774	747	747	2,062	747	747	2,789	747	747	2,062	747	747	2,789	15,678
The William Holton Memorial Fund 2													
Non-Profit Account													
XXXX4488	341	1,043	2,703	1,837	212	1,490	341	1,043	2,703	1,837	212	1,653	15,413
Library Commission Funds-Gales Ferry Library													
Non-Profit Account													
XXXX2811	33	33	305	33	33	400	33	33	305	33	33	305	1,575
Library Commission Funds-Either Library													
Non-Profit Account													
XXXX8251	28	28	245	28	28	319	28	28	245	28	28	245	1,275
TOTAL PORTFOLIO	1,890	3,701	7,857	3,803	3,476	6,155	1,890	3,834	7,857	3,803	2,621	6,149	53,037
Grand Total	1,890	3,701	7,857	3,803	3,476	6,155	1,890	3,834	7,857	3,803	2,621	6,149	53,037



ACCOUNTS INCLUDED IN THIS REPORT

JANNEY ACCOUNTS

Account Number	Account Name	Manager	Tax Status	Account Value	% of Total Portfolio
XXXX1774	THE BILL LIBRARY BUILDING FUND	COMPASS	Tax Deferred/Exempt	\$668,045.51	36.7
XXXX6601	THE WILLIAM HOLTON MEMORIAL FUND	COMPASS	Tax Deferred/Exempt	\$521,620.59	28.6
XXXX4488	THE WILLIAM HOLTON MEMORIAL FUND 2	COMPASS	Tax Deferred/Exempt	\$514,120.22	28.2
XXXX2811	LIBRARY COMMISSION FUNDS-GALES FERRY LIBRARY	AMERICAN FUNDS	Tax Deferred/Exempt	\$65,558.90	3.6
XXXX8251	LIBRARY COMMISSION FUNDS-EITHER LIBRARY	AMERICAN FUNDS	Tax Deferred/Exempt	\$52,101.38	2.9
Total Internal Accounts				\$1,821,446.60	100.0



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Limitations

This report is provided at your request, for informational purposes only, and reflects our understanding of the information as of the date of this report. Account holdings and sector allocations are subject to change at any time. Please rely on your Janney account statement and confirmations as they are the official records of your account(s). Janney encourages you to compare information in this report against your Janney account statements and account statements issued by other custodians that hold assets included in this report to ensure accuracy. The assets of any external managed account included in this report may not be covered by SIPC and Janney's SIPC coverage only covers assets held by Janney. Please contact your representative at the firm managing the external account regarding SIPC coverage of the assets in such account.

This report does not contain investment advice or recommendations or constitute an offer to sell or buy any securities and may not be used or relied upon in connection with any offer or sale of securities.

Janney does not offer tax advice, nor do we make any representations as the tax status of any security within this report. This report may reflect average cost basis when a security is purchased in multiple lots. Please consult a qualified accountant or attorney for tax reporting advice.

The information contained herein, while not guaranteed, has been obtained from sources which we believe to be reliable and accurate.

External Assets/Liabilities

All information pertaining to any external assets and liabilities included in this report has been provided by client. Janney is not responsible for verifying, and has not independently verified, the accuracy of any information related to external assets or liabilities provided by client to Janney. Client should notify their Janney Financial Advisor immediately if there are any inaccuracies in the information that client has provided to Janney. Neither Janney nor your Financial Advisor provides advice on assets other than securities.

Investment Risk

All investments or investment strategies involve risk. Investors should consider the investment objectives, risks, charges and expenses of an investment or strategy carefully before investing.

Performance Information

The primary performance data used in most reports is a time-weighted methodology. Time weighted returns provide an accurate measure of how an account was managed regardless of the dollar value and is unaffected by cash flows. Your returns are calculated after the deduction of program fees (net), include the reinvestment of dividends and capital gains and are independent of the timing of your deposits or withdrawals to or from your account (for any that are time weighted.) Time weighted return calculations are most appropriate when comparing your portfolio's returns to index returns (i.e., benchmark) or manager returns. The alternate methodology available is dollar weighted, also known as money weighted or internal rate of return (IRR). This return can be provided in situations where there are large cash flows because greater relative weighting is given to those time periods where more money is invested in the portfolio. Any report that provides a dollar weighted return will label it as such. All other reports will display a time weighted return.

Not all assets referenced in this report are included in performance return calculations. Excluded assets may be referred to as non-performance assets. Examples of securities that may not be included are annuities, life insurance products and mutual funds not custodied at Janney. You can refer to the Portfolio Summary page to see a further explanation of the assets and values that are included or excluded in the stated returns

The term inception means the point in time upon which the account(s) became eligible for performance reporting and may or may not represent the account opening date.

Indices

Indices are hypothetical portfolios of specified securities, the performance of which is used as a benchmark in judging the relative performance of securities. Indices are unmanaged portfolios, include the reinvestment of dividends and capital gains and do not include the deduction of advisory fees or trading commissions, which would reduce returns and used for illustrative purposes only. It is not possible to invest in an index.

Index returns are used for illustrative purposes only. There may be material differences between your account and the indices references in this report. You should contact your Financial Advisor with any questions. For information relating to a specific index referenced in this report, please go to <http://janney.com/reports>.

Asset Allocation

All asset allocation features utilize the Morningstar X-ray functionality which is a sophisticated analytical tool that identifies the underlying securities in any mutual funds and annuities held in your account to help in evaluating your overall asset allocation and sector weightings, including exposing any concentrated positions. Classifications displayed as 'other' represent securities that have not been classified as part of an asset class by Morningstar. The 'Cash held in Mutual Funds, ETFs and UITs' category may include securities that Morningstar classifies as cash equivalents including Commercial Paper, Floating Rate Notes, Money Markets, Repurchase Agreements and any Government, Agency, Mortgage-Backed Securities, Municipal Bonds and CDs with maturities within 91 days.

Ratings - Fixed Income Securities

Many fixed income securities receive credit ratings from Nationally Recognized Statistical Rating Organizations (NRSROs) (e.g., Standard & Poor's (S&P), Moody's or Fitch). These NRSROs assign ratings to securities by assessing the likelihood of issuer default. Changes in the credit strength of an issuer may reduce the credit rating of its debt investments and may affect their value. High-quality debt instruments are rated at least AA or its equivalent by any NRSRO or are unrated debt instruments of equivalent quality. Issuers of high-grade debt instruments are considered to have a very strong capacity to pay principal and interest. Investment grade debt instruments are rated at least BBB or its equivalent by any NRSRO or are unrated debt instruments of equivalent quality. Baa rated securities are considered to have adequate capacity to pay principal and interest, although they also have speculative characteristics. Lower rated debt securities are more likely to be adversely affected by changes in economic conditions than higher rated debt securities.

Income

Any income included is for informational purposes only and should not be relied on to prepare tax filings. Information in the report is believed to be reliable but cannot be guaranteed. We suggest you review this information with your tax advisor and refer to the Form 1099(s) and other applicable tax reports issued to you for tax reporting purposes. Information is provided as of the date on the report and subject to change. Income totals do not include capital gain distributions, partnership distributions, royalty payments and return of capital.

Estimated Income

Estimated annual/monthly income is based on the most current information available to Janney. If current information is not available for a particular security, Janney will not include estimated income information. If income information is available but a payment frequency is not, Janney assumes a monthly income payment.

The basis or method of calculation for estimated income are as follows:

Equity (Stock)	Total number of shares multiplied by most recent dividend issued per share
Fixed Income (bonds)	Coupon schedule for the 12 months following the report date
Cash Equivalents	Total cash value multiplied by the 1-year rate of the 30-day Money Market Index (Taxable)

Current Yield

Current Yield equals the security's estimated annual income divided by its total market value.

Please contact your Financial Advisor if your financial situation, risk tolerance, or investment objectives have changed, there are additional restrictions you wish to discuss regarding your account, or you wish to modify existing restrictions. A copy of Janney's Form ADV, Part 2 disclosure documents are available free of charge on Janney's website (janney.com) or from your Financial Advisor.

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End of Report



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1191

Agenda Date: 8/17/2026

Agenda #: 4.

REPORT

Staff/Committee Report:
Friends of Ledyard Library



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1193

Agenda Date: 8/17/2026

Agenda #: 1.

MINUTES

Minutes:

Motion to approve the Library Commission Regular Meeting Minutes from June 15, 2026.



TOWN OF LEDYARD

Library Commission

Meeting Minutes

Bill Library
718 Colonel Ledyard Highway
Ledyard, Connecticut 06339

Gales Ferry Library
18 Hurlbutt Road
Gales Ferry, Connecticut 06335

Chair
John Bolduc

Regular Meeting

Monday, June 15, 2026

7:00 PM

Bill Library

I. CALL TO ORDER

Vice Chair Rolf Racich called the meeting to order at 7:00 p.m. at Ledyard Bill Library.

II. ROLL CALL

In addition, the following were present:

Jessica Franco - Library Director

Present Treasurer Ralph Hightower
 Vice Chair Rolf Racich
 Recording Secretary Ellin Grenger
 Commissioner Peter Diette
 Commissioner Gillian Thorne
 Commissioner Cynthia Wright
 Commissioner Elizabeth Rumery

Excused Chairman John Bolduc
 Commissioner Wendy Hellekson

III. RESIDENTS & PROPERTY OWNERS COMMENTS

None.

IV. PRESENTATIONS / INFORMATIONAL ITEMS

None.

V. MEMBER COMMENTS

None.

VI. REPORTS

1. Treasurer's Report

No changes to report submitted.

2. Director's Report

The Town Council has requested changes to how our budget is organized and labeled. No figures will be changed, just the organization. The LION line in particular will be impacted, so

that the ebooks contractual obligations to LION and LION services will be separated. LION will also be restructuring its services and offerings which may impact the characterization of these expenses. Library Director, Jessica Franco, will also be looking to the next strategic planning process, starting this fall. Monthly status report submitted with agenda was also reviewed.

Budget:

- We're happy to say that the budget passed without any changes. Now that Jessa is back one of the first things that she will do is to start working on FY 2027 budget.

Director Information:

- We are happy to have Jessa back at the helm! She was definitely missed and we look forward to having someone in the leadership role once again.

Library News:

- Summer is almost here and both the youth and adult departments are pretty much set and ready to go. Registration for both is now open but logging adventures and reading starts on June 20. This is also when our summer programming kicks off. We are really looking forward to having a fun and active summer at the library.
- May was a fairly quiet month for programming, especially in the youth department as weekly storytimes and other youth programming ended the second week of May. We use the time at the end of May and early June to prepare for summer. However, there was a well-attended birding program that Matt organized with fifteen people attending between in person and virtual attendees.
- Lyndsey represented the library at the Lion's Club where we were given a \$500.00 check. The Lions really enjoyed hearing about how we used their donation last year to buy the Yoto boxes and cards. We are fortunate that we have such supportive community partners.
- Our Tech Services department is doing a great job of keeping up with the end of the fiscal year processing. This has been a real challenge and we hope that next year we will be better able to space out the orders so that Erica is not overwhelmed with so many boxes. We really appreciate her hard work and are very fortunate to have her on staff.
- The new windows in the Gales Ferry children's room have been installed. What they hoped would be a two-day project turned into a week-long project so we had to close that area longer than we expected. But, now that everything is complete, we are very happy with our new windows. We look forward to cooler days where we can open those windows and have them stay open. We are still in the process of trying to match the paint to the walls in the areas that need to be touched up but hopefully that will be taken care of by the end of June.

Stacey Burt, Youth Services Librarian

3. Investment Working Group
No report, meeting will be in July.
4. Friends of Ledyard Library
No report.

VII. APPROVAL OF MINUTES

1. Library Commission Meeting Minutes May 18, 2026

RESULT: APPROVED AND SO DECLARED

MOVER: Elizabeth Rumery

SECONDER: Ralph Hightower

AYE 5 Hightower Racich Grenger Thorne Rumery

EXCUSED 2 Bolduc Hellekson

ABSTAIN 2 Diette Wright

VIII. OLD BUSINESS

Any Old Business proper to come before the Committee

None.

XI. NEW BUSINESS

Any New Business proper to come before the Committee

- Approval of Fiscal year 2026-2027 holidays. More information may be needed re: whether Union will require day after Christmas as a holiday since it is a Saturday, duration for summer Sunday closures, whether Juneteenth will be an approved holiday or Mayor's floating holiday, whether July 4th will be observed on July 5th since holiday is on a Sunday. Library Director will put onto the August agenda.
- Discussion of role of Secretary. Role can be refined, we need clarity as to the availability of technology for hybrid meetings, so that meetings can be recorded. Expectation will be that Commission members will attend in person for a percentage of their tenure, amount to be determined later.

X. NEXT MEETING

1. Next Meeting: August 17, 2026 at the Gales Ferry Community Center at 7:00 p.m.

XI. ADJOURNMENT

Mr. Hightower moved the meeting be adjourned, seconded
by Ms. Wright.

The meeting adjourned at 7:40 p.m.
VOTE: 7-0 Approved and so declared

Respectively Submitted,

Chairman John Bolduc
Library Commission

DISCLAIMER: Although we try to be timely and accurate these are not official records of the Town.



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1192

Agenda Date: 8/17/2026

Agenda #: 1.

AGENDA REQUEST
GENERAL DISCUSSION ITEM

Subject:

Secretary Role

Background:

Ellin Grenger resigned from her position as Secretary, as well as from the Commission. The role of the Secretary, the expectations for those performing it, the relationship with Library staff, and nominations for the role need to be discussed.

BYLAWS
Of the
LEDYARD LIBRARY COMMISSION

Article I - Name

The Ledyard Library Commission was created by Ordinance #22 of the Town Council of the Town of Ledyard, Connecticut, adopted on September 27, 1972, published October 6, 1972 and effective October 27, 1972; amended by Ordinance #25 dated June 11, 1975, published June 14, 1975, and effective July 4, 1975; and amended by Ordinance #37 dated April 8, 1987, published April 25, 1987, and effective May 16, 1987.

Article II – Purpose

Section 1. The Library Commission is the governing body of the Ledyard Library (Bill and Gales Ferry). The Commission shall act as advocates, both with elected officials and within the community, for the Library. They shall work with the Library Director to provide guidance and support to enable the library to fulfill its mission.

Article III - Membership

Section 1. The Commission shall consist of nine members to be appointed by the Town Council.

Section 2. The terms of the Commission members shall be two years, staggered so that five terms expire in the odd-numbered years, and four terms expire in even-numbered years.

Article IV - Powers and Duties

The Library Commission shall have the following powers and duties:

- a. Establish policies for the operation and use of the library;
- b. Recommend the employment of a library director, who shall act as advisor to the Commission on policies and shall serve as its chief administrator in the administration of such policies;
- c. Review, revise, approve and adopt a budget as submitted by the Library Director;
- d. Present the proposed budget with support materials to the Town Council;
- e. Expend, for library purposes, monies appropriated, credited or accruing to the library under its jurisdiction;
- f. Establish and maintain, with Council approval, library facilities and services as needed within the town;
- g. Accept any bequest, gift or endowment upon the conditions connected with same, provided such conditions shall not remove any portion of the libraries from the control of

the Commission or its successors or in any manner limit the free use of the libraries or, in the opinion of the Commission, fail to further the purposes of the libraries; and,

- h. Report annually in writing on library activities, to the local authorities for inclusion in the Town Report.

Article V - Officers

- Section 1. The officers shall be a Chairman, a Vice Chairman, a Secretary, and a Treasurer, elected from among the appointed members.
- Section 2. The Chairman shall preside at all meetings of the Commission, authorize calls for any special meetings, appoint all committees, execute all documents authorized by the Commission, serve as an ex-officio voting member of all committees, and generally perform all duties associated with that office.
- Section 3. The Vice Chairman, in the event of the absence or disability of the chairman, or of a vacancy in that office, shall assume and perform the duties and functions of the Chairman.
- Section 4. The Secretary shall keep a true and accurate record of all meetings of the Commission, handle all correspondence for the Commission and shall perform such other duties as are generally associated with that office. According to statute, a copy of the minutes of every meeting must be filed in the Town Clerks Office within seven (7) days of the meeting. A record of all votes must be in writing and available for public inspection within forty-eight (48) hours of the meeting and shall be included in the minutes.
- Section 5. The Treasurer shall document all expenditures from the Library Commission's Special Fund and report on them at each meeting. In the absence or inability of the treasurer, these duties shall be performed by such other members of the Commission as the Chairman may delegate.

Article VI – Nominations and Elections

- Section 1. The Chairman shall appoint a Nominating Committee prior to the January meeting. The Nominating Committee shall present a list of officers to the Commission to be voted on at the annual meeting, which will be the first meeting of a new calendar year. Election shall be by a majority vote of those present.
- Section 2. Officers shall serve a term of one year from the annual meeting at which they are elected and until their successors are duly elected. The Chairman shall not serve more than four consecutive terms.

Article VII - Meetings

- Section 1. A schedule of regular meetings for the year shall be filed in the Town Clerk's Office prior to January 1st of each year. The meetings shall normally be held each month, the date and hour to be set by the Commission.

- Section 2. The annual meeting, which shall be for the purpose of the election of officers, shall be held at the first meeting of the calendar year, which shall normally be in January.
- Section 3. An agenda for all regular and special meetings will be filed in the Town Clerk's Office twenty-four (24) hours in advance of the meeting. For Monday meetings it will be filed before the close of business on Friday.
- Section 4: The order of business for regular meetings shall include, but not be limited to, the following items, which shall be covered in the sequence shown so far as circumstances will permit:
- a. Citizens' concerns and requests
 - b. Roll call of members
 - c. Disposition of minutes of previous regular meeting and any special meeting.
 - d. Correspondence
 - e. Treasurer's report
 - f. Director's Report
 - g. Committee reports
 - h. Old Business
 - i. New business
 - j. Adjournment
- Section 5. Special meetings may be called by the Chairman or Secretary, or at the call of any two members of the Commission, for the transaction of business as stated in the call for the meeting, provided that notice thereof is given to all members at least twenty-four hours in advance of the special meeting. All special meetings must be posted by the Town Clerk twenty-four hours prior to the meeting.
- Section 6. All meetings are open to the public unless the Commission votes to have an executive session pursuant to *Roberts Rules of Order*.
- Section 7. A quorum for the transaction of business in any meeting shall consist of a majority of the members of the Commission.
- Section 8. Members are expected to attend all meetings. Intended absences should be reported to the Chairman or Library Director prior to the meeting. If a Commission member has two or more successive unexcused absences the Chairman may recommend to the Town Council that said member be replaced.
- Section 9. Remote Meeting Participation- Members may be able to participate in a meeting remotely if the following conditions are met.
- a. Acceptable Means for Remote Participation
A member of the Library Commission may attend a meeting remotely using the following acceptable mediums: telephone, internet, audio or video conferencing, or any other technology means that enables the remote participant and all those present at the meeting location to be clearly audible to one another. Remote participation should come from a location or device that can provide consistent and persistent signal strength.

- b. Circumstances for Remote Participation
Remote meeting participation is allowed for the following circumstances: personal illness, disability, emergency, or geographic distance. Remote meeting participation is not acceptable for reasons of convenience.
- c. Executive Sessions
Remote participation at an executive session will be permitted in accordance with the guidelines of this policy. The remote participant must state for the record that they are alone and cannot be overheard during the executive session. Alternatively, another person may be present with the member participating remotely, if the commission votes to authorize it.
- d. Chairman Remote Participation
In the event the Chairman is a remote participant; the Chairman Pro-tem will preside over the meeting.

Section 10 Conduct of meetings: *Robert's Rules of Order* shall govern proceedings of all meetings.

Article VIII - Library Director and Staff

The Commission shall recommend a qualified Library Director who shall be the executive and administrative officer of the library on behalf of the Commission and under its review and direction. The Director shall act as advisor to the Commission on policies and shall execute the policies adopted by this Commission. The Director's duties and responsibilities include:

- 1. Direct and supervise staff members in the performance of their duties;
- 2. Recommend the employment of additional personnel and the hiring of personnel;
- 3. Submit to the Commission an annual budget;
- 4. Submit written monthly reports; and,
- 5. Recommend to the Commission policies and procedures as, in the opinion of said library director, will promote the efficiency of the library in its service to the people of the community.

Article IX - Committees

Section 1. The Chairman shall appoint committees of one or more members each for such specific purposes as the business of the Commission may require from time to time. The committee shall be considered to be discharged upon the completion of the purpose for which it was appointed and after the final report is made to the board.

Section 2. All committees shall make a progress report at each of the Library Commission's meetings.

Section 3. No committee shall have other than advisory powers unless, by suitable action of the Commission, it is granted specific power to act.

Article X- General

- Section 1. An affirmative vote of the majority of all members of the Commission present at the time shall be necessary to approve any action before the Commission. The chairman may vote upon and may move or second a proposal before the Commission.
- Section 2. The bylaws may be amended by the majority of all members of the Commission. Amendments may be proposed at any regular meeting, but shall become effective only after the favorable vote at a subsequent regular meeting.
- Section 3. Any of the foregoing rules may be suspended temporarily in connection with the business at hand, provided that there is a unanimous vote of all the members present for a meeting that has a quorum in attendance, and the vote of such suspension shall be taken by yeas and nays and entered in the official record.

Adopted 05/03/73
Amended 12/10/18



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1201

Agenda Date: 8/17/2026

Agenda #: 2.

AGENDA REQUEST
GENERAL DISCUSSION ITEM

Subject:
Holiday List

Department Comment/Recommendation:

Holidays are not included in any of the Commission's governing documents, as such as will use the Town's approved holiday list this year and moving forward.



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1186

Agenda Date: 8/17/2026

Agenda #: 3.

AGENDA REQUEST
GENERAL DISCUSSION ITEM

Subject:

Age Related Policies

Background:

While onboarding, Jessa familiarized herself with the library's policies. She found a number of inconsistencies regarding ages and circulation loan periods.

Department Comment/Recommendation:

The attached policies would align the ages to the State's law for unattended children, which is 12 years old. Jessa would also like to propose eliminating the Internet Permission Form and replacing it with a more comprehensive Internet Use Policy. Please see the attached documents to review the updates, and the Director's Report for a more comprehensive explanation.

Circulation at Ledyard Public Library

Library Cards

Library cards are required for all patrons to check out materials and use online services. Library cards are for personal, non-commercial use and are non-transferable. Due to licensing restrictions, the library is not permitted to share remote access with other libraries, organizations, or institutions.

Patrons are expected to present their card during each transaction. If a patron doesn't have their physical or digital card with them, they will be required to verify their address in order to check out materials.

Ledyard Residents

Ledyard residents are eligible for a free Ledyard Public Library card with proper identification and a completed Library Patron Application.

Residents may also apply for a library card online. A barcode number is issued allowing patrons to place holds and is valid for 3 months. The patron will need to pick up their card at the library and provide proof of residency before they can check out materials. The expiration date for the card is then extended for 4 years.

Library cards are valid for 4 years and renewals are free. There is a replacement fee of \$1 for a lost card.

Proper Identification

Valid, unexpired, photo identification (driver's license or state-issued identification) showing current Ledyard residence is preferred for new, renewal, or lost cards. Additional proofs of residence include rental agreements, tax bills, utility bills, bank statements, or other documents that show the person's name and current Ledyard address. Students may show their school IDs or their parent/legal guardian's proof of residence.

Youth applicants will show the proof of residence for their parent/legal guardian.

Adult & Student Library Cards

Library cards are available for anyone 12 years or older. A voter registration form will be offered applicants 18 and older. [updated to 12 and up for standardization across policies]

Youth Library Cards

Youth library cards are available to minor borrowers under the age of 12. A parent/guardian must sign the Library Patron Application. Guardians assume responsibility for the content, condition, and prompt return of materials. [updated to under 12 for standardization across policies]

Under the State's Connecticard program, children of divorced parents may have multiple cards, one under the responsibility of each parent. Cards must be issued by the Town in which that individual parent and child reside.

Linked Accounts

Library card holders may link their accounts when creating them. Linked accounts allow patrons to pick-up each other's holds, view current checkouts, and pay fees. A permission form must be completed when linking two adult cards. Youth cards may be linked to the parent/guardian listed on the library card application. [Added a better definition of linked accounts]

Non-Residents

Ledyard Public Library participates in the borrowIT CT and Connecticard program supported by the Connecticut State Library. This program allows:

- Connecticut residents who live outside of Ledyard to borrow materials, as long as they present a valid and unexpired card from their hometown library. A Ledyard Public Library registration form must be completed and signed by the applicant and/or guardian. Staff will then create a record for them within the library's system, using the hometown library's barcode and expiration date. Non-resident borrowers must renew their cards at their hometown library.
- Please note that residents of towns that are part of the LION consortium do not need to be added to the system as we share a patron database. Borrowers from other LION Libraries still need to present a valid library card when checking out.

Teacher Cards

Cards may be issued to Ledyard teachers or homeschoolers for books to use in the classroom. Library rules on loan periods and lost or damaged materials apply to all items checked out on this card. Teachers must present a valid school ID and fill out the Teacher Library Card Application. Once issued, cards are kept on file at Ledyard Public Library location where they registered. Teachers are given the card's barcode number to place holds and utilize online resources. Teacher cards expire every July 1 and teachers will need to renew as long as they continue to teach in Ledyard. [Formalized an existing process]

Group Home / Residential Facility Cards

The Library encourages the residents of group homes and other facilities to register for their own, individual library cards. If a resident of a group home cannot verify their residency with the traditional methods, the facility can provide a letter on official letter head confirming their residence. The letter should include the applicant's name as it matches their ID.

Should a facility, located in Ledyard or Gales Ferry, want a library card for organizational use, they can apply under similar rules to Teacher Cards. They must present a valid ID or paystub from the residential facility when filling out the application, as well as fill out the Residential Facility Application. Library rules on loan periods and lost or damaged materials apply to all

items checked out on this card. Residential Facility Cards expire annually on July 1 and staff will need to renew as long as they continue to work at a facility in Ledyard or Gales Ferry. [Created to accommodate recent requests, designed to match the Teacher Card program]

Invalid Library Cards

Library cards may become temporarily invalid for any of the following reasons:

- Card has expired
- Long-overdue materials have not been returned
- Damaged or lost item charges in excess of \$25 [old rule was \$100, lowered to prevent increased loss and match the limit within OverDrive]

Removing Library Cards

Annual Records Maintenance

Ledyard Public Library performs records maintenance once a year, during which library cards that have been expired for over 3 years will be deleted. Accounts that owe the library an excess of \$25 will be saved for an additional 3 years.

Death Related Removal

Families may notify the library of a patron's passing to have their card deactivated. If the family posted a publicly available obituary and their account does not have items checked out or fees, staff have the right to deactivate the card. If accounts have items checked out, we ask that families return the items before the card is deactivated.

[Both subsections formalize an unwritten practice]

Loan Rules

Library Card Limitations

Each library card is limited in the number of items it can check out, please review the following limitations:

- Total Checkouts: 100 items
- Museum Passes: 1 per family
- Yotos: 5 cards per family

Some items may auto-renew, depending on item type and if there are no holds on the item. Patrons are allowed a total of two renewals before the item must be brought back to the owning library.

Checkout Periods

Library items may be checked out for a specific period of time. Most items have at least one automatic renewal before being considered overdue, with the exception of museum passes.

- Books: 21 Days
- Magazines: 21 Days

- DVDs: 7 Days
- Audiobooks (CDs): 21 Days
- Yoto Cards & Players: 7 Days
- Music (CDs): 21 Days
- Toys: 21 Days
- Board Games: 21 Days
- Museum Passes: 2 Days
- Bill Library Key: 2 Days
 - Note, this item is only available for after-hours Community Meeting Room reservations only. Please see our Community Meeting Room Regulations for more information about this service.
- Janice W. Bell Historical Research Room Key: 2 Days
 - This item requires written permission from the Ledyard Historical Society and is restricted to Ledyard Historical Society members only. [this line is dependent on Historical Society MOU/MOA]

Non-Circulating Items

Reference materials, newspapers, local history items, yearbooks, and items whose physical format is very susceptible to damage do not circulate. Books and materials designated as non-circulating may circulate for 1 week at the discretion of the Assistant Librarian, in consultation with the Director and affected staff members. These items may not be renewed.

Holds

Most items can be placed on hold, with the exception of museum passes, library key, toys, boardgames, CD players, and the Eversource electricity monitor. Holds may be placed online or by calling the Library. Materials that are not retrieved within 7 library open days of the notice of availability will be made available for the next patron.

Fines and Fees

Overdue Materials

Ledyard Public Library does not charge fines for overdue materials. It is expected that items will be returned in a timely manner.

Lost and Damaged Items

If an item is determined to be Lost, the LION consortium sends an email or printed bill notifying the patron that they will be charged for the full cost of the lost item. Patrons can either pay the fee or return the missing item. Material found after the replacement fees are paid becomes property of the patron. Ledyard Public Library does not provide refunds.

[The old language is not in line with Town practices and policies: Payment will be refunded if the item is returned in good condition within 6 months.].

Items are inspected for damage upon return to the library. Any item that is determined to be damaged will be charged to the patron.

Ledyard Public Library cannot waive lost or overdue fees for materials belonging to other libraries in the LION system.

Maximum Fees

Patrons are blocked from checking out items if they have charges totaling \$25 or more. To restore access to their card, patrons can pay their lost and/or damaged item fees. Please contact the library to discuss the available payment methods.

Equipment and Usage Fees

There are fees for select services that are not tracked through a library card, including:

- Lost card replacement: \$1.00
- Printing and Copying: Black and white are \$0.10 a side. Color prints are \$0.50 a side.
- Faxing: \$1.00 per page, including cover page
- 3D Printing: \$0.10 per gram of filament used

Patrons may copy 3 pages from a reference source or newspaper, free of charge. There is no charge to youth copying out of reference books.

[Old document lists a ten-cent charge for scanning from the copier]

Ledyard Public Library Computer/Internet Policy

Introduction

Ledyard Public Library provides free access to a diversity of ideas, resources, and experiences in a variety of formats including access to the Internet. It is the policy of the Library to:

- prevent user access to, or transmission of, inappropriate material via Internet, electronic mail, or other forms of direct electronic communications over its computer network;
- prevent unauthorized access and other unlawful online activity;
- prevent unauthorized online disclosure, use, or dissemination of personal identification information of minors; and
- comply with the Children's Internet Protection Act [Pub. L. No. 106-554 and 47 USC 254(h)].

It is not acceptable to use the Internet for any purpose that violates U.S. or Connecticut laws. This includes but is not limited to transmitting threatening, obscene, or harassing materials, or interfering with or disrupting network users, services, or equipment. As with all formats of information, patrons must respect copyright laws and licensing agreements.

Filters

As required by the Children's Internet Protection Act (CIPA), in order to remain eligible for certain federal funding, the Library has implemented filtering software on all of its internet-accessible computer terminals. To the extent practical, these filters shall be used to block or filter the internet, or other forms of electronic communications, access to inappropriate information.

Specifically, blocking shall be applied to visual depictions of material deemed obscene or child pornography, or to any material deemed harmful to minors.

Subject to staff supervision, technology protection measures may be disabled for adults or, in the case of minors, minimized only for bona fide research or other lawful purposes.

Use by Minors

The Library affirms and acknowledges the rights and responsibilities of parents and guardians to monitor and determine their children's access to Library materials and resources, including those available through the Internet.

~~A parent or legal guardian of a minor under 17 years of age must sign the minor's application for a library card and approve access to the Library's computer resources.~~

A parent or legal guardian of a minor under twelve (12) years of age must accompany the child when using the computer.

Internet Safety

The Library will take steps to promote the safety and security of all users of the Library's online computer network. However, the Library is not and cannot be responsible for maintaining the privacy or confidentiality of personal or personally identifiable information provided by a user to a third party via the Internet.

Inappropriate Network Usage

Unauthorized access or use of Library computers, databases, network, hardware, or software settings is prohibited. Specifically, as required by CIPA, inappropriate network usage includes: (a) unauthorized access, including so-called 'hacking' and other unlawful activities; and (b) unauthorized disclosure, use, and dissemination of personal identification information regarding minors. Damage to Library computer **equipment and** resources is also prohibited. **Additionally**, users must comply with applicable copyright laws and licensing agreements. Violation of these rules may result in the loss of Library privileges.

Usage Guidelines:

- **Hours of Use:** Computer workstations are available for use when the library is open to the public. The Wi-Fi network is always available outside of the buildings.
- **Registration:** Users are required to check out a computer workstation with a valid library card or another form of identification.
- **PAC:** Public Access Catalogs are not considered computer workstations. These serve primarily as the online catalog for the library's holdings, and patrons are asked to use them to search for books or magazines.
- **Children:** Children under **9 twelve (12)** must be accompanied by an adult to use a computer workstation. ~~Children under 17 who wish to use the Internet must have a parent or guardian complete a permission form.~~
- **Time Limits:** The library does not impose a time limit on Internet use inside the library unless patrons are waiting. When others are waiting, user sessions will be limited to 2 hours. ~~for the computer (word processing, excel, etc.) or 1 hour for Internet.~~ If all workstations are in use, patrons should register at the circulation desk.
- **Training:** Staff availability to help users with basic computer use or with Internet access is limited. Users must have basic computer skills including the ability to use a mouse. The library has several resources available about the Internet, and workshops may be scheduled from time to time.
- **Saving Files:** Files created may be temporarily saved to the hard drive. They will automatically be removed when the computer is shut down. Files may be saved to an external device.
- **Fees:** There is no charge to use computers. Printing charge of \$0.10 per side (black and white) or \$0.50 per side (color).

Adopted by the Library Commission 2/19/1987
Revised 05/12/2015
Revised 08/16/2021

DRAFT

Ledyard Public Library Unattended Child Policy

In order to create an environment of safety and maintain an atmosphere where reading and study can be encouraged, the Library Commission adopts the following guidelines with regard to children in the library.

- Parents and caregivers should be mindful that the library is a public building open to all individuals and that unattended children are vulnerable.
- All children under the age of ~~ten (10)~~ twelve (12) shall at all times be attended and adequately supervised by a responsible person. Parents and caregivers are accountable for the conduct of their children while on library premises and must provide appropriate supervision based on the ages, abilities, and levels of responsibility of their children.
- The library staff is not responsible for providing supervision and care for children while parents or caregivers are outside the library or in another part of the building. The staff does not monitor children leaving the premises.
- Children are expected to adhere to the same standards of conduct expected of adults. All Library users are required to respect Library property and to act in a manner appropriate to the use and function of the Library.
- For children older than ten, parents and caregivers are expected to be aware of the opening and closing times of the Library and to make suitable arrangements. Children at the library at closing time will be allowed to call parents from the library's phone for transportation. No staff member is obligated to stay with the child, and under no circumstances shall a library staff member transport a child in their car. The police may be called in emergency situations.

Parents and caregivers are referred to Connecticut General Statute 53-21a, which describes the legal consequences that can result from leaving children under the age of twelve (12) unattended in a public place.

Adopted by the Library Commission 04/16/2007

Ledyard Public Libraries' Behavior Policy

In our efforts to provide a comfortable environment for all library users, we have established a Library Behavior Policy for our patrons. The purpose of the Policy is to define unacceptable behavior and also to suggest conduct that is appropriate in a library.

Violations of the Policy will result in increasing levels of action, ranging from asking the patron to leave the library for the remainder of the day to the patron's permanent loss of all library privileges to legal prosecution. The level of action shall be determined on a case-by-case basis and shall be within the sole discretion of the Library Director or his or her designee. When serious incidents occur or when police are called to respond to an incident, an Incident report is filed with the Library Director.

1. Unacceptable Behavior causes excessive noise levels, creates disturbances, interferes with other patrons' use of the library, damages library property, and is not permitted at the library. Unacceptable behavior includes, but is not limited to:
 - a. Loud, disruptive conversations, including shouting;
 - b. Use of profane and/or abusive language;
 - c. Harassment of others, either verbally or by physical actions. This includes any actions that other patrons or staff members perceive to be harassing;
 - d. Threatening others either verbally or by physical actions. This includes any actions that other patrons or staff members perceive to be threatening;
 - e. Use of alcohol and narcotics is not permitted. Patrons under the influence of either alcohol or narcotics will not be allowed on the Library premises;
 - f. Throwing, running and climbing in the library;
 - g. Indiscriminate pulling of materials from shelves in a manner that disrupts the orderly and proper arrangement of library materials;
 - h. Radios and other sound producing devices may not be used in the library unless they are used with headphones and the sounds are not audible to others;
 - i. Use of cellphones should be limited, discreet and at a level that is not disruptive to others. In consideration of other patrons we ask that cell phone conversations be taken out to the lobby. (See Cell phone policy)

2. Library staff cannot be expected to assume responsibility for the care of unsupervised children, under the age of eighteen. Parents or legal guardians are responsible for the behavior of children.
3. In accordance with our policy on unattended children, children ~~(10) years of age under twelve~~ (12) years of age must be accompanied by, and at all times, be under the supervision of, a parent or other responsible caregiver.
4. All patrons must leave the premises after closing, unless they are participating in a prescheduled program or meeting.
5. Anyone involved in the theft, defacement or mutilation of library materials or property will be subject to arrest and prosecution.
6. Food and drink spillage can damage valuable resources. Patrons shall refrain from having food or drink around any computer or electronic equipment and exercise care with food or drink around any other library resource. The patron is responsible for any damage done by their food or drink.

These policies are drafted in accordance with Sec. 11-32 and Sec. 53-21a of the Connecticut General Laws.

**Adopted by Ledyard Library Commission 03/21/2026
Revised 06/20/2022**

Ledyard Public Library Computer/Internet Policy

Introduction

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Filters

As required by the Children's Internet Protection Act (CIPA), in order to remain eligible for certain federal funding, the Library has implemented filtering software on all of its internet-accessible computer terminals. To the extent practical, these filters shall be used to block or filter the internet, or other forms of electronic communications, access to inappropriate information.

Specifically, blocking shall be applied to visual depictions of material deemed obscene or child pornography, or to any material deemed harmful to minors.

Subject to staff supervision, technology protection measures may be disabled for adults or, in the case of minors, minimized only for bona fide research or other lawful purposes.

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Inappropriate Network Usage

Unauthorized access or use of Library computers, databases, network, hardware, or software settings is prohibited. Specifically, as required by CIPA, inappropriate network usage includes: (a) unauthorized access, including so-called 'hacking' and other unlawful activities; and (b) unauthorized disclosure, use, and dissemination of personal identification information regarding minors. Damage to Library computer **equipment and** resources is also prohibited. **Additionally**, users must comply with applicable copyright laws and licensing agreements. Violation of these rules may result in the loss of Library privileges.

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- **Saving Files:** Files created may be temporarily saved to the hard drive. They will automatically be removed when the computer is shut down. Files may be saved to an external device.
- **Fees:** There is no charge to use computers. Printing charge of \$0.10 per side (black and white) or \$0.50 per side (color).

Adopted by the Library Commission 2/19/1987
Revised 05/12/2015
Revised 08/16/2021

DRAFT



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1194

Agenda Date: 8/17/2026

Agenda #: 4.

AGENDA REQUEST
GENERAL DISCUSSION ITEM

Subject:

Motion to approve the Library Commission's budget for FY27.

LIBRARY COMMISSION FY 2026-2027 BUDGET PROPOSAL

MUNIS OPERATING LINE

INCOME	FY27 Budget	Current Month	YTD		
FY26 Carryover	4,040.55		4,040.55		
Donations	-	-	-		
Grants	-	-	-		
Total Receipts		-	4,040.55		
EXPENDITURES	FY27 Budget	YTD	Current Month	Combined	Net Budget
Adult Programs	400.00	150.00	-	150.00	250.00
Children's Programs	750.00	-	-	-	750.00
Seed Library	150.00	-	-	-	150.00
Grants	-	-	-	-	-
Donations	-	-	-	-	-
Total Expenditures	1,300.00	150.00	-	150.00	1,150.00
BALANCE		(150.00)	-	3,890.55	

MUNIS STATE GRANT LINE

INCOME	FY27 Budget	YTD	Current Month	Combined	
FY26 Carryover	2,281.00			2281.00	
BorrowIT Reimbursement	1,000.00	-	-	-	
Other	-	-	-	-	
Total Receipts	3,281.00	-	-	2,281.00	
EXPENDITURES	FY27 Budget	YTD	Current Month	Combined	Net Budget
TBD	-	-	-	-	-
Total Expenditures	-	-	-	-	-
BALANCE		-	-	2,281.00	

LIBRARY INVESTMENT FUNDS - EITHER FY 2025-2026 BUDGET

INCOME	FY27 Budget	YTD	Current Month	Combined	
Investment Income - Either	1,275.00			1,275.00	
Grants/Bequests	-	-	-	-	
Donations	-	-	-	-	
Hauptfeld	1,469.39	1,469.39	-	1,469.39	
Total Receipts		1,469.39	-	2,744.39	
EXPENDITURES	FY27 Budget	YTD	Current Month	Combined	Net Budget
Investment Income - Either	-	-	-	-	-
Hauptfeld to Spend	3,015.00	1,015.00	-	1,015.00	2,000.00
Total Expenditures	3,015.00	1,015.00	-	1,015.00	2,000.00
BALANCE		454.39	-	1,729.39	

LIBRARY INVESTMENT FUNDS - GALES FERRY FY 2025-2026 BUDGET					
INCOME	FY27 Budget	January YTD	February	Year To Date	
Investment Income - Gales Ferry	1,575.00	-	-	-	
Donations	-	-		-	
Total Receipts	1,575.00	-	-	-	
EXPENDITURES	FY27 Budget	YTD	Current Month	Combined	Net Budget
Investment Income - Gales Ferry	-	-	-	-	-
Total Expenditures	-	-	-	-	-
BALANCE		-	-	-	



TOWN OF LEDYARD

741 Colonel Ledyard
Highway
Ledyard, CT 06339-1511

File #: 26-1195

Agenda Date: 8/17/2026

Agenda #: 5.

AGENDA REQUEST
GENERAL DISCUSSION ITEM

Subject:

Motion to approve the Investment Working Group's recommendation about which investment fund to deposit Nancy Avery's bequest.