



High Plains Library District Friends & Foundation
Board of Directors
Regular Session
May, 8 2023
District Support Services
2650 W. 29th, St., Greeley, CO 80631
4:00pm

Please join my meeting from your computer, tablet or smartphone.
<https://meet.goto.com/842411693>

1. OPENING OF MEETING

- 1.1. Roll Call and Pledge of Allegiance
- 1.2. Approval of Agenda (Action)
- 1.3. Approval of February 6, 2023 Minutes (Action)
- 1.4. Public Comment

2. ITEMS FOR ACTION/INFORMATION

- 2.1. Introduction of New Employee (Information)
- 2.2. Board of Directors Icebreaker (Information)
- 2.3. Board Designated Fund Report (Information)
- 2.4. 2023 Meeting Schedule Revisions (Action)
- 2.5. Open Board Application for New Member (Information)
- 2.6. Re-designation of Board Designated Funds (Action)
- 2.7. Updates to Stifel Account (Information)

3. FINANCE REPORT Natalie Wertz, Finance Manager

4. FOUNDATION REPORT Niamh Mercer, Foundation Director

- 4.1. Fundraising Updates
- 4.2. Volunteer Updates
- 4.3. Event Updates

5. BOARD COMMENTS

6. ADJOURNMENT



**High Plains Library District Friends & Foundation
Board of Directors
DRAFT Regular Session
February 6, 2023
District Support Services
2650 W. 29th, St., Greeley, CO 80631
4:00pm**

This meeting will also be streamed virtually via GoToMeeting:

<https://www.gotomeet.me/NiamhMercer/hpld-foundation-board-of-directors-meeting>

OPENING OF MEETING

Meeting Opened: 4:07pm

1.1. Roll Call and Pledge of Allegiance

Present: Chairman Gerri Holton, Director Annie Epperson

Present via voice conference: Director Mandy Schnirel, Director Matthew Starr, Director Teresa Curtis, Director Brecken Arnold, Director Kelley Carmichael Casey, Secretary/Treasurer Julie Forland

Staff Present: Foundation Director Niamh Mercer, Development Associate Christina Hardman, Finance Manager Natalie Wertz, Executive Director Matthew Hortt, Carolyn Valencia, Naomi Nguyen, Amy Ortiz (via voice conference), Rick Medrano (via voice conference), AnaLicia Anastasi (via voice conference), Lisa Varra (via voice conference), Thomas Samblanet (via voice conference), Emily Schilling (via voice conference)

1.2. Approval of Agenda (Action)

Motion: Director Carmichael Casey moved to approve the agenda as presented.

Second: Director Schnirel

Vote: Unanimously approved 8;0

1.3. Approval of November 7, 2022 Minutes (Action)

Motion: Director Starr moved to approve the November 7, 2022 Minutes as presented.

Second: Director Carmichael Casey

Vote: Unanimously approved 8;0

1.4. Public Comment

No public comment.

2. ITEMS FOR ACTION/INFORMATION

2.1. Board of Directors Icebreaker (Information)

The Board of Directors shared what they are most looking forward to as a member of Friends & Foundation in 2023.

2.2. Board Designated Fund Report (Information)

Districtwide Events and Experience Supervisor Amy Ortiz provided a report on the 2022 Summer Reading Adventure Program. She stated the program made their attendance and completion goals. The 2023 theme is "All Together Now" to promote building community and teambuilding.

Ortiz provided a quarterly report on 2023 YES!fest. It will contain 25 exhibitors and 4 presenters. The Board Designated Funds may go towards a YES!fest tote bag and other marketing needs or incentives for the September 16th 2023 event.

Ortiz provided a quarterly report on the 2023 Greeley PopUp Pride which takes place on June 10th. Board Designated Funds may be used for a Food Truck and supplies. Members of the queer community have thanked the library for providing a safe inclusive event.

M.O.V.E. Librarian Carolyn Valencia provided a quarterly report on Widening the Window. She stated that they are working on video testimonials for marketing the program. She is grateful for the platform that the District has provided. Valencia stated that the program has been a real life-changer for some of the participants and that they are able to engage in some critical conversations. Chairman Holton stated that it's a very innovative program and there are not many programs like this.

Teen Services Librarian Emily Schilling gave a quarterly report on 100 Books Before Graduation. She stated that students as early as middle school have until Graduation to read 100 books. Incentives will be handed out after each 25 books.

Chairman Holton asked where Outreach is taking the program.

Schilling stated that Outreach will provide marketing materials and prizes at all their book stops.

Library Director AnaLicia Anastasi provided a quarterly report on Northern Plains Public Library's Summer Reading Adventure. She stated it's the largest program in Ault as in a small town like Ault there are not many summer programs. With the funding, they are increasing the teen participation. She stated they are hoping the prizes will get the kids in the door.

Foundation Director Niamh Mercer provided a quarterly report on behalf of Jana Teal on the Carbon Valley Regional Library's Nature Play Space. She stated the Foundation is preparing to apply for grants for the space. They have ordered their shed that was paid for by Board Designated Funds and it will arrive in March. Grant funds will hopefully provide rest of needs for the space.

Adult Services Librarian Lisa Varra provided a quarterly report on the Annual Juried Art Show at Erie Community Library. She thanked the Board for providing the art show funds. She stated the art show began in 2020 and is designed to build community. The funding from the Board provides a participation award and music at the art show.

Library Director Naomi Nguyen provided a quarterly report on the Platteville Power Project of which the Board Designated Funds paid for the change from florescent lighting to LED. The LED lighting is mostly completed. She stated the patrons have commented on the change. She thanked the Board for the funds. She stated that the other part of the project, the parking EV Station, is at a standstill but that Foundation Director Mercer is helping her find grants.

Director Curtis asked Nguyen what started the need for these items.

Nguyen stated that over the pandemic Nantes investments weren't doing well and a Nantes Board Member suggested solar panel. She stated that they could serve the community better and in addition they always wanted a parking lot for their library.

Director Curtis stated that she has been to the Platteville library a few times and it would be nice to have a parking lot there.

Library Director Thomas Samblanet provided a quarterly report on the Fort Lupton Capital Project. He thanked the Foundation for supporting the new facility and stated they broke ground on the new library last June. The new facility will be 14,000sqft. He stated most funding from the Board Designated Funds is for the canopy outside of the library. Grand opening is in early June. Foundation Director Mercer shared that they are selling bricks for a brick walk until March 24th.

2.3. Introduction of New Members (Information)

Director Curtis introduced herself and stated that she has been involved with HPLD for several decades. She has wanted to be with the Foundation Board of Directors for several years.

Director Epperson introduced herself and stated that she is a faculty member at the UNC library. She is fascinated by process and is looking forward to how she can be of service.

Director Schnirel introduced herself and stated that she goes to the library every week with her two young boys. She has experience in PR, fundraising, and event.

2.4. Board of Directors Orientation (Information)

Foundation Director Mercer provided the new members of the Board with an orientation.

2.5. Nomination of Officers (Action)

Motion: Director Starr moved to accept the nomination of officers.

Second: Director Arnold

Vote: Unanimously approved 8;0

Director Curtis will now be referred to as Chairman Curtis and Chairman Holton is now Director Holton.

2.6. Nomination of Committees (Action)

Motion: Director Carmichael Casey moved to accept the nomination of committees.

Second: Director Arnold

Vote: Unanimously approved 8;0

3.FINANCE REPORT Natalie Wertz, Finance Manager

Finance Manager Natalie Wertz provided an updated Foundation Finance Report to the Board.

4.FOUNDATION REPORT Niamh Mercer, Foundation Director

4.1 2022 Foundation Summary

Mercer shared the 2022 Foundation Summary.

4.2 2023 Calendar and Development Plan

Mercer shared the 2023 Calendar and Development Plan with the Board

4.3. Staffing Updates

Mercer shared about Christina Hardman's promotion and our new hire who will be in attendance next meeting.

5. BOARD COMMENTS

Director Holton stated she is thankful for the information received today and that the coordination of volunteers is a huge undertaking.

6. ADJOURNMENT

Motion: Director Carmichael Casey moved to adjourn the meeting.

Second: Director Starr

Vote: Unanimously approved 8;0

Meeting Closed: 5:42pm

HIGH PLAINS LIBRARY DISTRICT FOUNDATION BOARD OF DIRECTORS COMMUNICATION

Meeting date: 05/08/2023
Type of item: Information
Subject: Introduction of New Employee
Presented by: Niamh Mercer, Foundation Director

Background

Staff would like to introduce Sorrel Sudtelgte, Friends & Foundation Associate to the Board of Directors.

DRAFT

HIGH PLAINS LIBRARY DISTRICT FOUNDATION BOARD OF DIRECTORS COMMUNICATION

Meeting date: 05/08/2023
Type of item: Information
Subject: Icebreaker
Presented by: Niamh Mercer, Foundation Director

Background

The HPLD Friends & Foundation Board starts every meeting with an icebreaker to connect and learn more about each other.

If you could write a book, what would it be about?

DRAFT

HIGH PLAINS LIBRARY DISTRICT FOUNDATION

BOARD OF DIRECTORS COMMUNICATION

Meeting date: 05/08/2023
Type of item: Information
Subject: Board Designated Fund Report
Presented by: Niamh Mercer, Foundation Director

Background

In November 2022, the Board approved 15 requests for Board Designated Funds in accordance with our Spending Policy (<http://www.mylibrary.us/wp-content/uploads/2017/09/Spending-Policy.pdf>). \$15,700 was distributed to projects across the District. During this meeting you will hear updates from **100 Books Before Graduation, Widening the Window, and Fort Lupton**.

You will find a description for every Board Designated Fund project below. Please find Q2 project updates attached to this Board Packet.

- **100 Books Before Graduation**
 - Summary: 100 Books Before Graduation is a twist on the popular 1,000 Books Before Kindergarten. Branch Teen Librarians will start a year-long reading program for teens. It will target patrons in 6th-12th grade. Using the Beanstack app, patrons will track the number of books they read and attempt to read 100 books before they graduate from high school. Incentives will be given each time the patron reads 25 books. This is a new program.
 - Lead: Olivia Pratt
 - Location: Branch Libraries and MOVE
 - Distribution: \$1,000 general use

- **Summer Reading Adventure (SRA)**
 - Summary: HPLD's annual Summer Reading Program to foster personal growth and development, promote a passion for reading, and support family literacy. This is a recurring program.
 - Location: Branch Libraries, MOVE and participating Member Libraries
 - Lead: Amy Ortiz
 - Distribution: \$2,500 general use

- **Greeley Pride PopUp -THIS EVENT HAS BEEN CANCELED**
 - Summary: Greeley PopUp Pride Celebration is an inclusive all-ages event that celebrates the LGBTQIA+ communities and helps educate community members through conversation, diverse literature, and connectivity. Community partners play an active role with interacting and informing participants about inclusive services geared towards marginalized populations. This is a recurring program.
 - Location: Greeley. Specific park has yet to be determined.
 - Lead: Amy Ortiz
 - Distribution: \$1,000 Sponsorship, general use

- **Yes!Fest**
 - Summary: Youth Engineering and Science Festival – YES!fest – is a fun and educational festival for the whole family. Booths and exhibitors from across many science and engineering fields will provide hands-on activities for all age levels. YES!fest seeks to create a change in attitude toward engineering as a meaningful potential career option and emphasize its relevance in our everyday lives.
 - Location: LINC
 - Lead: Amy Ortiz
 - Distribution \$2,500 for Presenting Sponsor and general use

- **Summer Reading Program (NPPL)**
 - Summary: Our Summer Reading Program is expanding, due the rapid population growth in Pierce, Nunn, and Ault, as well as a focused marketing effort by our Children's Librarian to expand the program. In just the last year, our Summer Reading participation grew by 50% compared to 2021. We are expecting this growth to continue, as several new housing developments are expected in our area and when the most recent subdivision was completed, we saw a sharp increase in numbers. We also contribute this increase in participation to our prize incentives, activities associated with Summer Reading, and creative promotions in the library.
 - Location: Northern Plains Public Library
 - Lead: AnaLicia Anastasi
 - Distribution \$1,000 general use

- **Widening the Window**
 - Summary: Inspired by the "Let's Talk About Race" series, "Widening the Window", is a series that thoughtfully discusses race, introduces the idea of radicalized trauma, and implements various healing techniques for families. Designed specifically for 8 families, the goal of this 4-month series is to encourage thoughtful and courageous community conversation about diversity, race, racial inequality, and radicalized trauma. Participants will receive a family book bag with three children's picture books and one adult-reading-level non-fiction book. This 90-minute program hosted once a month at Greeley-Evans School District 6 Family Center will begin with a 20-minute family storytime featuring one diverse children's picture book focused on three themes: 1) observation, 2) empathy, and 3) loving-kindness. Librarians will model how to talk about diversity, inclusion, race, racism, and equality in age-appropriate ways with preschoolers, school-aged children (up to 10-yrs of age), parents, and caretakers. Following the storytime, the children will participate in a theme-appropriate crafting activity while adults engage in a 60-minute discussion focusing on segments of the adult non-fiction book. Two trained facilitators will direct the conversation by providing prompts to encourage thoughtful dialogue. Additionally, theme-appropriate resources will be available for check-outs. Throughout the month, 2-3 tools will be offered to the family members via email. These tools will consist of the following options: 1) beginner gentle yoga videos, 2) breath work complimenting exercises offered in the adult non-fiction book, 3) 3 to 5-minute meditations, 4) podcasts/TedTalks, and 5) journal prompts and worksheets; all of which support the healing journey of the participants.
 - Location: Greeley Evans School District 6
 - Lead: Carolyn Valencia
 - Distribution \$2,000 general use

- **Carbon Valley Library Nature Play Space**
 - Summary: The High Plains Library District patrons and community members look to the library for ways to enhance and enrich their lives. The Jan Cruz Nature Trail currently provides education about local wildlife, a place to exercise and focus on well-being, and it is a gathering space where all are welcome. We are planning to create a Nature Play Space that will offer our young patrons a place of their own where they can explore, build, cooperate, and discover nature in open-ended play and experiential learning. We look forward to making a positive impact that benefits the children in our community.
At Carbon Valley we want to offer an accessible play space that encourages natural play with earth elements of dirt, water, plants, wind, and sun. This space will include items like a mud kitchen, funnel stand, balance scale, tree blocks for building, stacking stones, sand table, water table, garden planters, and sensory plants. We have a few of these items already and look forward to adding more through help from the HPLD Friends and Foundation. We are also requesting a storage shed to safely store the outdoor play equipment in the winter. We will also incorporate activities to encourage children and families to walk the nature trail such as scavenger hunts. They will also enjoy reading a book with our StoryWalk that will circle around

the trail. The Nature Play Space along with the Nature Trail will offer a multitude of opportunities for outdoor programming such as: *Let's Build with Nature *Nature Walk Bracelets * Nature Art & Journaling* *Outdoor Storytimes * Let's Get Growing: Plants * Flower Art*

- Location: Carbon Valley Regional Library
- Lead: Jana Teal
- Distribution \$3,100 for shed

- **Annual Juried Arts Show-Erie**
 - Summary: Erie Community Library has hosted a Juried Kids Art Show for 3 years running. The event takes place in September/October of each year as a community event that highlights the artistic talent children ages 3-18. The Erie Chamber of Commerce and local artist/teacher Kristi Arzola partners with the library to put on the art show. Award ribbons are given for 1st, 2nd, 3rd, and Honorable Mention, as well as People's Choice Awards in each of the 5 age categories.
 - Location: Erie Community Library
 - Lead: Lisa Varra
 - Distribution \$600 general use

- **Platteville Power Project**
 - Summary: Platteville Public Library and its board are working on a "Power Project." We'd like to install an off-street row of angled parking spaces. This parking lot would have 1-2 dual fast-charging points for electric vehicles (EVs), which would charge 2-4 cars. We'd also like to be listed with Weld Office of Emergency Management (OEM) as a temporary shelter during power outages and other emergencies. This will require the purchase & installation of a generator or (preferably) a battery wall to better utilize the electricity we collect from our solar panels. We currently collect an average of 45% more power than we use per month. Lastly, we'd like to change overhead fluorescent lights inside the building to LED's. This would allow us to be even more energy efficient. Some of the saved electricity could go to the charging stations and to the battery wall.
 - Location: Platteville Public Library
 - Lead: Naomi Nguyen
 - Distribution \$1,500 for electrician costs

- **New Fort Lupton Library Facility**
 - Summary: After nearly three decades of a joint space for high school students and public library users, the Fort Lupton Public and School Library is building a separate facility for public library services. The new building will have increased community spaces, including study rooms, a makerspace, a children's courtyard, and a meeting room, as well as a schedule and layout less related to school needs. The new building also increases security for the high school and its students by removing the general public from the school building.
 - Location: Fort Lupton Public and School Library
 - Lead: Thomas Samblanet
 - Distribution \$500 for logo brick in brick walk

Form Name: HPLD Friends & Foundation Quarterly Report Form
Submission Time: April 12, 2023 1:35 pm
Browser: Chrome 111.0.0.0 / Windows
IP Address: 107.1.216.226
Unique ID: 1090264499
Location: 40.1306, -104.9504

Project Name 100 Books Before Graduation

Email opratt@highplains.us

Project Lead Olivia Pratt

Describe the progress made towards the project's goals and objectives.

100 Books Before Graduation launched on March 1st 2023. At this time patrons were able to come into any of the library branches or the bookmobile to register for the program or they could register themselves at home using the Beanstack Tracker app. Patrons are encouraged to use the app to log their books and track their progress, however we did create paper logs for those who do not have access to the internet. Currently when a patron registers for the program they receive a lanyard and a 100 Books Before Graduation sticker. Moving forward they receive a keychain to add to their lanyard after each 25 books they read. The keychains include different characters from various franchises such as Marvel, Star Wars, and Harry Potter. We are looking into changing the incentive plan for next year so that kids will receive prizes every 10 books rather than every 25 in order to keep them engaged in the program.

The launch included a 100 Books Before Graduation website which can be viewed at <https://www.mylibrary.us/100bbg/>.

Within the first month 75 kids registered for the program and logged a total of 403 books read. A break down of the data such as the age of the kids who registered and from what branch can be viewed in the attached 100 BBG Individual Reader Participation Report.

Please upload any attendance data you may have available. <https://www.formstack.com/admin/download/file/14472131269>

Please share any qualitative data you would like to share that is easier to copy and paste a link or information. Comment from 7th grader on bookmobile, after learning about 100 Books Before Graduation: "This sounds so fun!"

From a teacher at one of the schools Outreach visits: "I'd like to do this with my English classes next year!"

Form Name: HPLD Friends & Foundation Quarterly Report Form
Submission Time: April 12, 2023 2:03 pm
Browser: Chrome 111.0.0.0 / Windows
IP Address: 73.78.247.187
Unique ID: 1090282207
Location: 40.4837, -104.8994

Project Name Widening the Window EDI Family Book Club 2023

Email cvalencia@highplains.us

Project Lead Carolyn Valencia

Describe the progress made towards the project's goals and objectives. WtW facilitators, Carolyn Valencia, Amy Ortiz, Bridget Parker, Rick Medrano, Tim Ruth, and Veronica Lucero have made a few adjustments to our outcomes and outputs. Please see these in all caps listed below.

Outputs: 1) RETAINING 90% OF FAMILY ATTENDANCE RATE, and 2) 10 THEME-RELATED RESOURCES WILL BE CHECKED-OUT AT EACH PROGRAM

Outcomes: 1) SHARING AND ENCOURAGING civic engagement within Weld County, 2) courageous community dialogue around sensitive subjects, 3) increased knowledge of tools that support healing and management of trauma, and 4) growing ongoing partnership with D6

Facilitator update: Greg Cocking has stepped down from a WtW facilitator role due to scheduling conflicts. Ryan McDougal, principal at Scott Elementary may be stepping into this role for our upcoming series.

2023 dates:

Saturday, September 2nd

Saturday, October 7th

Saturday, November 4th

Saturday, December 16th or the 2nd, if that works better

Please upload any qualitative data you would like to share. <https://www.formstack.com/admin/download/file/14472372424>

Please share any qualitative data you would like to share that is easier to copy and paste a link or information. 2022 Feedback:
https://highplains-my.sharepoint.com/:b:/g/personal/cvalencia_highplains_us/EREpZU4RtzJAgK09uyuuU1UB9QwF5FsNyIJ_HYj6RbuzfA?e=77w2sj

Form Name: HPLD Friends & Foundation Quarterly Report Form
Submission Time: April 12, 2023 4:33 pm
Browser: Chrome 111.0.0.0 / Windows
IP Address: 107.1.216.226
Unique ID: 1090355557
Location: 40.1306, -104.9504

Project Name Carbon Valley Nature Play Space- Shed Installation

Email jteal@highplains.us

Project Lead Jana Teal

Describe the progress made towards the project's goals and objectives. The storage shed from Home Depot was purchased on February 6, 2023. The shed was installed on April 12, 2023. We're very excited as this is the first big step to creating our Nature Play Space! Having this storage is vital to keeping nature play toys and materials safe in the winter, as well as offering a close proximity to the play space so that we are able to change out activities easily throughout the seasons. The shed is primed for painting. We'll be working with our Lead Custodian to contact painters to complete this project. Thank you so much!

Please upload any qualitative data you would like to share. <https://www.formstack.com/admin/download/file/14473424746>

Please share any qualitative data you would like to share that is easier to copy and paste a link or information. Photos uploaded.

Form Name: HPLD Friends & Foundation Quarterly Report Form
Submission Time: April 16, 2023 6:39 pm
Browser: Chrome 112.0.0.0 / Windows
IP Address: 107.1.216.226
Unique ID: 1091644026
Location: 40.1306, -104.9504

Project Name 4th Annual Juried Youth Art Show

Email lvarra@highplains.us

Project Lead Lisa Varra

Describe the progress made towards the project's goals and objectives.

No designated funds have been spent as of this date.

Supplies for the mounting kits will be purchased in May or June.

Planning meeting: February 21 with Pat Vero, Erie Chamber of Commerce & Kristi Arzola, local artist/teacher/co-chair of project.

Important dates and theme decided:

The 2023 theme is: Summer Vacation

Marketing release: May 1, 2023

Exhibit duration: August 21 - October 22, 2023

Art drop off: Saturday, August 19, 12pm - 4pm

Opening Reception: Saturday, September 9, 5:30pm-7pm

Please share any qualitative data you would like to share that is easier to copy and paste a link or information.

N/A

Form Name: HPLD Friends & Foundation Quarterly Report Form
Submission Time: April 17, 2023 10:45 am
Browser: Chrome 111.0.0.0 / Windows
IP Address: 73.243.123.240
Unique ID: 1091825511
Location: 40.4102, -104.7584

Project Name 2023 Summer Reading Adventure

Email aortiz@highplains.us

Project Lead Amy Ortiz

Describe the progress made towards the project's goals and objectives.

The Friends and Foundation (\$2,500) supporting funds were spent to help purchase 200+ Scholastic books for prize 2. The total cost of the books was 3,471.25 (see attached invoice in planner).

The Walmart grant of \$1,000 was split evenly among 7 locations (minus Kersey). The SRA team voted to distribute the funds for operating SRA funds (cost of supplies/performer fees).

Please share any qualitative data you would like to share that is easier to copy and paste a link or information.

The SRA Incentives Team anticipates a 20% increase in prize redemption this summer. Last summer we ran out of prizes. The southern locations, Farr, and LINC Libraries expect increased participation.

The Friends and Foundation supportive funds, Walmart grant, 100 Human Bean, 2,200 Pizza Hut, and 250 Culvers coupons will help immensely.

The SRA Team is thankful for the extra funds helping to enrich the SRA participant's experience.

Form Name: HPLD Friends & Foundation Quarterly Report Form
Submission Time: April 17, 2023 11:04 am
Browser: Chrome 111.0.0.0 / Windows
IP Address: 73.243.123.240
Unique ID: 1091833856
Location: 40.4102, -104.7584

Project Name 2023 Greeley PopUp Pride

Email aortiz@highplains.us

Project Lead Amy Ortiz

Describe the progress made towards the project's goals and objectives.

The PopUp Pride Team is prepping to purchase supplies, performers, and a food truck for the June 10th event at the University of Northern Colorado Garden Theater. The Friends and Foundation supporting funds (\$1000) tentatively will be spent on purchasing a Food Truck (Luna's Tacos).

Participants at the event will receive a booth passport encouraging them to visit eight educational booths and complete the three survey questions on the back of the booth passport. When the participant completes the booth passport, they will receive their prize from the food truck.

The Pride Committee aims to capture needed community feedback to help understand how the library can better serve queer folks.

Fill in all eight stamps at the exhibitor tables and fill out the survey on the back to earn a prize!

HOW CAN THE LIBRARY/COMMUNITY BETTER SUPPORT LGBTQIA+ COMMUNITIES?

ARE YOU INTERSTED IN HELPING LEAD NEXT YEAR'S PRIDE EVENT? HOW CAN IT BE IMPROVED?

WHAT TYPES OF QUEER PROGRAMMING WOULD YOU LIKE TO SEE IN THE LIBRARIES?

Please share any qualitative data you would like to share that is easier to copy and paste a link or information.

The Pride team anticipates an increase in attendance from last year, considering the involvement of our community partners on the planning committee. Last year 164 people attended. We expect 300 attendees this year. Hosting the event at the University will attract more students. We aim to capture feedback from 18-24 years old's.

Form Name: HPLD Friends & Foundation Quarterly Report Form
Submission Time: April 17, 2023 11:19 am
Browser: Chrome 111.0.0.0 / Windows
IP Address: 184.96.189.168
Unique ID: 1091841337
Location: 39.7388, -104.9868

Project Name NPPL Summer Reading

Email northernplainspl@gmail.com

Project Lead AnaLicia Anastasi

Describe the progress made towards the project's goals and objectives. Last month, we decided on a summer reading theme. The team came up with "Exploring New Depths", which will be an ocean theme. There will be a meeting on 4.20.23, where all members involved with this project will finalize their duties and tasks. Decorations, reading bingo cards, prizes, etc. will all be determined at this meeting.

Please share any qualitative data you would like to share that is easier to copy and paste a link or information. n/a

Form Name:	HPLD Friends & Foundation Quarterly Report Form
Submission Time:	April 17, 2023 11:21 am
Browser:	Chrome 111.0.0.0 / Windows
IP Address:	73.243.123.240
Unique ID:	1091842193
Location:	40.4102, -104.7584

Project Name	2023 Yes!Fest
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Email	aortiz@highplains.us
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Project Lead	Amy Ortiz
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Describe the progress made towards the project's goals and objectives.

The Yes!Fest Incentives Team is working on utilizing the Friends and Foundation supporting funds (\$2,500) for incentives for completing the booth passport/survey at the event and customized merchandise to be sold at the event (Yes!Fest T-shirts/bags). The goal is to give 300 prizes (Slinky's, leggo kits, stem kit throwies) to participants that complete the passport activity. Each family (first 150) will receive a free Yes!Fest bag. Additional (300) Yes!Fest bags and (300) shirts will be sold at the event with the help Foundation.

The subcommittee brainstormed prizes/quantity for (teaser programs, passport completion, surveys, and merch). Last meeting Audrey discussed planning for a quantity of 300 prizes and merch for sale (t-shirts and bags). Example: For 300 bags, JanWay will charge > \$600 and inPRNT quoted > \$500.

Please share any qualitative data you would like to share that is easier to copy and paste a link or information.

The Yes!Fest team is thankful for the Friends and Foundation support. Thank you, Niamh and Christina, for helping seek sponsors for additional funding.

Form Name:	HPLD Friends & Foundation Quarterly Report Form
Submission Time:	April 17, 2023 1:09 pm
Browser:	Chrome 112.0.0.0 / Windows
IP Address:	174.63.6.242
Unique ID:	1091894145
Location:	39.997, -105.0974

Project Name	Fort Lupton Public and School Library - Public Facility Brick Walk
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Email	tsamblanet@fhighplains.us
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Project Lead	Thomas Samblanet
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Describe the progress made towards the project's goals and objectives.	<p>We have officially closed our brick walk sales and have exceeded our goals set for this part of our fundraising efforts with the assistance of Foundation. Our goal had been to raise \$10,000 worth of funding for the exterior canopy of our new facility, and we totaled just over \$12,000 in sales. We sold more bricks that we expected total and more than we had initially planned and are working with designers to add more space to the brick walk as we have run out a physical space for them, a great problem to solve which we should be able to accomplish without major issues! The new public library facility is still under construction however, due to construction delays we are looking at pushing our opening back 4-6 weeks to early to mid July.</p>
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Please share any qualitative data you would like to share that is easier to copy and paste a link or information.	<p>We will share data to support the effect of this fundraising project as we complete and move into the new facility and start to see usage stats.</p>
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Form Name: HPLD Friends & Foundation Quarterly Report Form
Submission Time: April 17, 2023 3:16 pm
Browser: Chrome 112.0.0.0 / Windows
IP Address: 65.102.217.122
Unique ID: 1091954741
Location: 39.9422, -104.7854

Project Name Platteville Power Project

Email nnguyen@highplains.us

Project Lead Naomi Nguyen

Describe the progress made towards the project's goals and objectives. Switch to LED from fluorescent: Final replacements were completed 4/16/2023. This part of the project is complete, as we have received the \$1500 HPLD grant, and our contractor has been paid.

Temporary Shelter with Weld Office of Emergency Management:

- * I met with a second contractor, Patrick Sandback of Mountain Mobile Generators, for a less expensive product. I'm still waiting on his official bid. I expect it to be significantly less as it is for a diesel mobile unit.
- * I spoke to Denise Bradshaw of Weld OEM, who advises grant funding may be available through the county for a generator/ battery wall. She encouraged me to continue looking for a battery wall solution.
- * I've e-mailed back and forth with Namaste Solar regarding battery wall possibilities. We're in the process of scheduling a phone call and site meeting to determine the costs and technical specs of building a battery wall.

Parking Lot w/ EV Charging station:

- * I spoke to Susan Staples regarding eRate for connecting the EV stations to internet. We'll wait to discuss specifics until 2023 IGA discussion is concluded.
- * On Feb 13, I met with Matt Hortt, Ken Poncelow, and Ellen Hale (Platteville/ Nantes Board VP) regarding the IGA, specifically with regard to a 2nd WiFi network for Platteville that is separate from HPLD's.
- * HPLD Board approved the IGA addendum on Feb 20, and Platteville/ Nantes board approved it on Feb 28.

Please share any qualitative data you would like to share that is easier to copy and paste a link or information. None at this time.

HIGH PLAINS LIBRARY DISTRICT FOUNDATION

BOARD OF DIRECTORS COMMUNICATION

Meeting date: 05/08/2023
Type of item: Action
Subject: 2023 Meeting Schedule Revisions
Presented by: Niamh Mercer, Foundation Director
Staff Recommendation: Staff recommend that the Board vote to determine if the meeting location should be changed.

Background

There is an opportunity to move the location of our Q3 and Q4 meetings to LINC (Library Innovation Center) 501 8th Ave., Greeley, CO 80631. Would the Board like to move the location of the upcoming Q3 and Q4 meetings from DSS to LINC?

Revised 2023 HPLD Friends & Foundation Board of Directors Meeting Schedule

Q3

Regular Session

August 7th 4:00pm

LINC

501 8th Ave., Greeley, CO 80631.

Q4

Regular Session

November 6th 4:00pm

LINC

501 8th Ave., Greeley, CO 80631.

Staff Recommendation

Staff recommend that the Board vote to determine if the meeting location should be changed.

HIGH PLAINS LIBRARY DISTRICT FOUNDATION

BOARD OF DIRECTORS COMMUNICATION

Meeting date: 05/08/2023
Type of item: Information
Subject: Open Board Application for New Members
Presented by: Niamh Mercer, Foundation Director
Staff Recommendation: Staff recommend that the Board open an application and follow the proposed application schedule and seek new applicants.

Background

The HPLD Friends & Foundation Board currently has seven members. To remain in accordance with its Bylaws, staff recommend that we seek applicants to fill the two open positions.

Proposed Timeline

August 14: Open Application

September 11: Close Application

First Week of October: Interview Applicants

November 6: Vote to approve nomination committee's recommendations.

January 2024: New members begin term

Staff Recommendation

Staff recommend that the Board open an application and follow the proposed application schedule and seek new applicants.

HIGH PLAINS LIBRARY DISTRICT FOUNDATION

BOARD OF DIRECTORS COMMUNICATION

Meeting date: 05/08/2023
Type of item: Action
Subject: Re-designation of Board Designated Funds
Presented by: Niamh Mercer, Foundation Director
Staff Recommendation: Staff recommend that the Board vote to re-distribute \$1,000 in Board Designated Funds from the canceled Greeley PopUp Pride Celebration to another approved high-impact Districtwide funding project.

Background

On Friday, April 28th HPLD made the decision to cancel the Greeley PopUp Pride Celebration and shared the following statement with staff.

“After an internal review of the planning for the Greeley PopUp Pride Celebration and taking into account the recommendation of one of our key and valued partners, we have determined that we are unable to put on a successful event that would celebrate our LGBTQIA+ Community at this time.

We have elected to not host the event. In doing so, we look forward to partnering with community members on future events. This does not mean that we are stopping our support of Pride events. We will be participating in the Erie & Johnstown Events as a vendor. We would encourage both you and our staff to attend and support the events that are occurring. “

The HPLD Friends & Foundation Designated \$1,000 in Board Designated Funds to the Greeley PopUp Pride Celebration. These funds have already been transferred to the District. Staff recommend that the HPLD Friends & Foundation Board vote to re-designate these funds to another project that is already receiving funding support from the Friends & Foundation and that has a high impact upon the community. Possible high-impact, Districtwide projects include HPLD’s Summer Reading Adventure and YES!fest.

Staff Recommendation

Staff recommend that the Board vote to re-distribute \$1,000 in Board Designated Funds from the canceled Greeley PopUp Pride Celebration to another approved high-impact Districtwide funding project.

HIGH PLAINS LIBRARY DISTRICT FOUNDATION

BOARD OF DIRECTORS COMMUNICATION

Meeting date: 05/08/2023
Type of item: Information
Subject: Updates to Stifel Account
Presented by: Niamh Mercer, Foundation Director

Background

The Finance Committee met with Stifel representative Joe Nally to review the Friends & Foundation's account and discuss potential updates. Teresa Curtis was unable to meet at our scheduled time but reviewed the meeting recording and materials afterwards. Stifel recommends adjusting our investment constraints from 80% stock to 70% stock and moving from our current growth investment plan to a value investment plan.

Our current growth investment plan has been in place since 2013. Moving to a value investment plan would also include adjustments to our allocations in the sector holdings. These recommendations are based on a 60% forecast for recession and a projected downward trend in our net gains from an average of 6% in the last 10 years to 5%-7% in the next 10 years.

The Finance Committee found that these recommendations are in alignment with the organization's [Investment Policy](#). In accordance with that policy, the Finance Committee recommends that the presented updates be made to the HPLD Friends & Foundation's Stifel Account. Natalie Wertz, Finance Manager, will work with Stifel to make those changes.

This information was provided for awareness to the Friends & Foundation Board of Directors. No action needs to be taken in accordance to the organization's [Investment Policy](#).

High Plains Library District Foundation

Statement of Financial Position

As of March 31, 2023

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
10000 FirstBank	13,760.40
11000 Investments	
11001 Stifel Nicolaus	505,252.09
11002 Colotrust	144,772.59
Total 11000 Investments	650,024.68
Total Bank Accounts	\$663,785.08
Total Current Assets	\$663,785.08
TOTAL ASSETS	\$663,785.08
LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
Equity	
30000 Opening Balance Equity	599,974.55
32000 Unrestricted Net Assets	0.00
Net Revenue	63,810.53
Total Equity	\$663,785.08
TOTAL LIABILITIES AND EQUITY	\$663,785.08

High Plains Library District Foundation

Statement of Activity

January - March, 2023

	TOTAL
Revenue	
43400 Donations	
43450 Restricted Donations	9,333.45
43451 UnRestricted Donations	4,723.23
43452 Vacation Donations	344.45
43453 Capital Campaign	1,725.00
Total 43400 Donations	16,126.13
47000 Sales	
47008 Book Sales - Foundation	2,362.12
Total 47000 Sales	2,362.12
47400 Grants	
47401 Operating	20,000.00
Total 47400 Grants	20,000.00
47500 Earnings on Investments	30,706.67
47600 Interest and Dividend Income	2,539.55
Total Revenue	\$71,734.47
GROSS PROFIT	\$71,734.47
Expenditures	
62100 Contract Services	575.00
62110 Accounting Fees	914.28
62150 Outside Contract Services	3,500.00
Total 62100 Contract Services	4,989.28
65000 Operations	
65040 Supplies	394.66
Total 65000 Operations	394.66
65400 HPLD Foundation Grants	2,540.00
Total Expenditures	\$7,923.94
NET OPERATING REVENUE	\$63,810.53
NET REVENUE	\$63,810.53

**HIGH PLAINS LIBRARY DISTRICT FOUNDATION
STATEMENT OF ACTIVITY
BUDGET TO ACTUAL**

Note: Conditional formatting in the % of YTD Budget and % of Annual Budget is on a red to green scale for revenues and green to red scale for expenses. Green is favorable variance. Red is an unfavorable variance.

For the Period Ended March 31, 2023
25.0%
prepared April 13, 2023

	Jan. - March Actual	Jan. - March Budget	Variance Favorable (Unfavorable)	% of YTD Budget	YTD Actual	Annual Budget	Variance Favorable (Unfavorable)	% of Annual Budget
REVENUES								
Donations - Restricted	9,333	3,624	5,709	258%	9,333	14,500	(5,167)	64%
Donations - Unrestricted	5,067	2,499	2,568	203%	5,067	14,000	(8,933)	36%
Donations - Capital Campaign	1,725	148,554	(146,829)	1%	1,725	594,225	(592,500)	0%
Earnings on investments	33,247	6,249	26,998	532%	33,247	25,000	8,247	133%
Special Events Income	-	-	-	#DIV/0!	-	35,000	(35,000)	0%
Grant revenue	20,000	27,500	(7,500)	73%	20,000	50,000	(30,000)	40%
Other income	2,362	1,500	862	157%	2,362	6,000	(3,638)	39%
Total revenues	71,734	189,926	(118,192)	38%	71,734	738,725	(666,991)	10%
EXPENSES								
Professional Fees	-	1,751	1,751	0%	-	5,500	5,500	0%
Contract Services	4,989	5,761	772	87%	4,989	30,050	25,061	17%
Special Events Expenses	-	-	-	#DIV/0!	-	20,300	20,300	0%
Operations	395	2,574	2,179	15%	395	15,300	14,905	3%
HPLD Foundation Grants	2,540	152,877	150,337	2%	2,540	611,509	608,969	0%
Travel and Meetings	-	249	249	0%	-	1,750	1,750	0%
Capital Campaign	-	-	-	#DIV/0!	-	20,000	20,000	0%
Total expenses	7,924	163,212	155,288	5%	7,924	704,409	696,485	1%
Increase (Decrease) in Net Assets	63,810	26,714	37,096		63,810	34,316	29,494	

STIFEL PRESTIGE® ACCOUNT STATEMENT

1 1 1 D139707 SSNO000501

**HIGH PLAINS LIBRARY DIST
FRIENDS & FOUNDATION
ATTN NATALIE A WERTZ**



Your Financial Advisor (GC44):
JOE NALLY/LAURA SCHNELL

Office Serving Your Account:



PRIMARY INVESTMENT OBJECTIVE: Growth & Income
RISK TOLERANCE: Moderate Growth

For a full definition of this objective and risk tolerance, including the use of margin, please see www.stifel.com, IMPORTANT DISCLOSURES, or contact your Financial Advisor. If you have any questions concerning your investment objective or risk tolerance, or wish to make a change, please contact your Financial Advisor or the Branch Manager for this office.

TRADING TAX LOT RELIEF METHOD: First In, First Out
INVESTOR UPDATE

At December 31, 2022, Stifel, Nicolaus & Company, Incorporated had net capital of \$538,644,698 or \$516,252,049 in excess of the minimum requirement of \$22,392,649. The December 31, 2022 Statement of Financial Condition is available at no charge by calling (800) 488-0970 or logging onto www.stifel.com.

ACCOUNT PROTECTION

Stifel, Nicolaus & Company, Incorporated provides up to \$150 million of coverage for securities held in client accounts, of which \$1.15 million may be in cash deposits. Ask your Financial Advisor for more details.

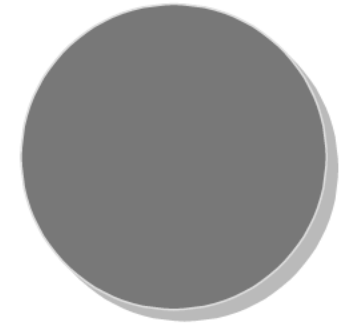
Thank you for allowing Stifel to serve you. In order to protect your rights, including rights under the Securities Investor Protection Act (SIPA), please promptly report, in writing, any inaccuracies or discrepancies in this account or statement to the Compliance Department of Stifel at the address below. If you have any questions regarding your account or this statement, please contact your Financial Advisor or the Branch Manager for this office. For additional information regarding your Stifel account, please refer to the current Stifel Account Agreement and Disclosure Booklet, which is available at www.stifel.com/disclosures/account-agreement.

PORTFOLIO SUMMARY	March 31	February 28
Net Cash Equivalents		
Net Portfolio Assets held at Stifel	505,252.09	494,759.10
Net Portfolio Assets not held at Stifel		
Net Portfolio Value	\$505,252.09	\$494,759.10
YOUR CHANGE IN PORTFOLIO VALUE	March 31	February 28
Net Cash Flow (Inflows/Outflows) ²		
Securities Transferred In/Out		
Income and Distributions	773.23	136.20
Change in Securities Value	9,719.76	-12,971.47
Net Change in Portfolio Value	\$10,492.99	-\$12,835.27

² Does not include cost or proceeds for buy or sell transactions.

YOUR ASSET SUMMARY

	Value on	Percentage of
	March 31, 2023 (\$)	your account
F Mutual Funds	505,252.09	100.00%
Total Assets	\$505,252.09	100.00%



F



ASSET SUMMARY

	Value as of March 31, 2023				Gains/(-)Losses		
	<i>At Stifel</i>	<i>Not at Stifel</i>	<i>Total</i>	<i>% of assets *</i>	<i>Unrealized</i>	<i>Realized</i>	
						<i>This Period</i>	<i>Year-to-date</i>
Cash							
Cash Sweep**							
Margin Balance							
A. Net Cash Equivalents	\$0.00		\$0.00				
B. Equities							
C. Preferreds							
D. Fixed Income-Muni							
E. Fixed Income-Other							
F. Mutual Funds	505,252.09		505,252.09	100.00%	45,063.16		927.10
G. Unit Investment Trusts							
H. Insurance Products							
I. Alternative Investments							
J. Other Investments							
K. Stifel Smart Rate Program **							
Net Portfolio Assets	\$505,252.09	\$0.00	\$505,252.09	100.00%	\$45,063.16	\$0.00	\$927.10
Net Portfolio Value	\$505,252.09	\$0.00	\$505,252.09	100.00%	\$45,063.16	\$0.00	\$927.10

INCOME & DISTRIBUTION SUMMARY

	<i>Security Type</i>	<i>Year-to-date</i>	<i>This period</i>
Dividends	Tax-Exempt		
	Taxable	1,057.66	773.23
Interest	Tax-Exempt		
	Taxable		
Capital Gain Distributions			
Return of Principal			
Other			
Total Income & Distributions		\$1,057.66	\$773.23

INFORMATION SUMMARY

	<i>Security Type</i>	<i>Year-to-date</i>	<i>This period</i>
Accrued Interest Paid	Tax-Exempt		
	Taxable		
Accrued Interest Received	Tax-Exempt		
	Taxable		
Gross Proceeds		7,474.33	
Federal Withholding			
Foreign Taxes Paid			
Margin Interest Charged			

* Please note "% of assets" figures are shown gross of any amounts owed to Stifel and/or net short positions.

** Include balances which are FDIC insured bank deposits, not cash held in your Securities Account and not covered by SIPC.



ASSET DETAILS

This section shows the cash equivalents and/or securities in your account. Prices obtained from outside sources are considered reliable but are not guaranteed by Stifel. Actual prices may vary, and upon sale, you may receive more or less than your original purchase price. Contact your Financial Advisor for current price quotes. Gain/Loss is provided for informational purposes only. Cost basis may be adjusted for, but not limited to, amortization, accretion, principal paydowns, capital changes, listed option premiums, gifting rules, inheritance step-up, or wash sales. The Gain/Loss information should not be used for tax preparation without the assistance of your tax advisor. Lot detail quantity displayed is truncated to the one thousandth of a share.

NET CASH EQUIVALENTS

	<i>Current value</i>	<i>Cost Basis</i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
Total Net Cash Equivalents	\$0.00	\$0.00	\$0.00	

PORTFOLIO ASSETS - HELD AT STIFEL

Mutual Funds	<i>Symbol/ Type</i>	<i>Quantity</i>	<i>Current Price/ Current Value</i>	<i>Average Unit Cost/ Cost Basis</i>	<i>Original Investment⁷/ Cumulative Return⁸</i>	<i>Unrealized Gain/(-)Loss¹⁰</i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
Open-End Funds								
AMCAP CL F2 CUSIP: 023375827 <i>Dividend Option: Reinvest</i>	AMCFX Cash	2,724.226	33.5900 91,506.75	29.6948 80,895.23	46,848.87 44,657.88	10,611.56	328.26	0.36%
AMERICAN BALANCED CL F2 CUSIP: 024071821 <i>Dividend Option: Reinvest</i>	AMBFX Cash	3,097.094	29.4400 91,178.44	27.0697 83,837.26	58,309.27 32,869.17	7,341.19	1,685.74	1.85%
BOND FUND OF AMERICA CL F2 CUSIP: 097873822 <i>Dividend Option: Reinvest</i>	ABNFX Cash	4,456.021	11.6100 51,734.40	13.1261 58,490.30	48,703.00 3,031.40	-6,755.93	1,586.78	3.07%
FUNDAMENTAL INVESTORS CL F2 CUSIP: 360802821 <i>Dividend Option: Reinvest</i>	FINFX Cash	1,427.888	63.6100 90,827.95	57.6268 82,284.66	41,864.53 48,963.42	8,543.29	1,534.55	1.69%
GROWTH FUND OF AMERICA CL F2 CUSIP: 399874825 <i>Dividend Option: Reinvest</i>	GFFFX Cash	1,665.134	54.8500 91,332.59	47.6451 79,335.45	41,214.35 50,118.24	11,997.16	466.40	0.51%



HIGH PLAINS LIBRARY DIST
 FRIENDS & FOUNDATION
 ATTN NATALIE A WERTZ
 HORIZON ACCOUNT

March 1 -
 March 31, 2023
 Account Number: [REDACTED]

ASSET DETAILS (continued)

PORTFOLIO ASSETS - HELD AT STIFEL (continued)

Mutual Funds	<i>Symbol/ Type</i>	<i>Quantity</i>	<i>Current Price/ Current Value</i>	<i>Average Unit Cost/ Cost Basis</i>	<i>Original Investment⁷/ Cumulative Return⁸</i>	<i>Unrealized Gain/(-)Loss¹⁰</i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
Open-End Funds								
SMALLCAP WORLD	SMCFX	1,442.759	61.4600	52.2236	53,601.09	13,325.89	174.71	0.20%
CL F2	Cash		88,671.96	75,346.08	35,070.87			
CUSIP: 831681820 <i>Dividend Option: Reinvest</i> <i>Original Cost: 75,344.03</i>								
Total Mutual Funds			\$505,252.09	\$460,188.98		\$45,063.16	\$5,776.44	1.14%
Total Portfolio Assets - Held at Stifel			\$505,252.09	\$460,188.98		\$45,063.16	\$5,776.44	1.14%
Total Net Portfolio Value			\$505,252.09	\$460,188.98		\$45,063.16	\$5,776.44	1.14%

FOOTNOTE DEFINITIONS

- ⁷ **Original Investment:** Total cost invested and held in the account as of month-end. Items may be adjusted for corporate actions, return of capital, or other miscellaneous adjustments, which may affect cost basis. Excludes purchases through automatic reinvestment of capital gains and dividends.
- ⁸ **Cumulative Return:** Current Value minus Original Investment. Cumulative Return is the capital appreciation (depreciation) of the entire purchased security, including purchases through automatic reinvestment of capital gains and dividends. Cumulative Return may not be accurate if any purchased shares are sold or transferred. Shares purchased at a prior firm through automatic reinvestment of capital gains and dividends that are subsequently transferred into the Stifel account may be treated as "Original Investment" shares if appropriate coding is not supplied by the prior firm when transferred.
- ¹⁰ Please note "Unrealized Gain/(-)Loss" does not equal the total current value minus the total cost if any value or cost amounts are missing. Unrealized gains or losses are provided for your information only and should not be used for tax purposes.



HIGH PLAINS LIBRARY DIST
 FRIENDS & FOUNDATION
 ATTN NATALIE A WERTZ
 HORIZON ACCOUNT

March 1 -
 March 31, 2023
 Account Number:

ACTIVITY SUMMARY				CASH EQUIVALENTS		
Type of Activity	Activity	Year-to-date	This period	Cash	Cash Sweep	Margin
	Opening Balance - Net Cash Equivalents		\$0.00	\$0.00	\$0.00	\$0.00
Buy and Sell Transactions	Assets Bought	-7,642.66	-773.23	-773.23		
	Assets Sold/Redeemed	7,474.33				
Deposits	Deposits Made To Your Account					
Withdrawals	Withdrawals From Your Account					
Income and Distributions	Income and Distributions	1,057.66	773.23	773.23		
Cash Sweep Activity	Cash Sweep Activity					
Margin Interest	Margin Interest Charged					
Other	Other Transactions	-889.33				
Cash Management Activity	Card Activity					
	ACH/ATM Activity					
Checkwriting Activity	Checks You Wrote					
	Closing Balance - Net Cash Equivalents		\$0.00	\$0.00	\$0.00	\$0.00
Securities Transferred	Securities Transferred In/Out					

ACTIVITY DETAILS						CASH EQUIVALENTS			
						This period	Cash	Cash Sweep	Margin
Opening Balance - Net Cash Equivalents						\$0.00	\$0.00	\$0.00	\$0.00
Assets Bought									
Date	Activity	Quantity	Price	Description	Total	Cash	Cash Sweep	Margin	
3/1/2023	Reinvest Div	10.581		BOND FUND OF AMERICA CL F2 CUSIP: 097873822	-120.20	-120.20			
	****note****			REINVEST AT 11.360					
3/14/2023	Reinvest Div	12.589		AMERICAN BALANCED CL F2 CUSIP: 024071821	-359.04	-359.04			
	****note****			REINVEST AT 28.520					



HIGH PLAINS LIBRARY DIST
 FRIENDS & FOUNDATION
 ATTN NATALIE A WERTZ
 HORIZON ACCOUNT

March 1 -
 March 31, 2023
 Account Number:

of 10

ACTIVITY DETAILS continued	CASH EQUIVALENTS continued
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Assets Bought continued						Cash	Cash Sweep	Margin
Date	Activity	Quantity	Price	Description	Total			
3/16/2023	Reinvest Div	4.877		FUNDAMENTAL INVESTORS CL F2 CUSIP: 360802821	-293.99	-293.99		
	****note****			REINVEST AT 60.280				
Total Assets Bought					-\$773.23	-\$773.23		

Income and Distributions						Cash	Cash Sweep	Margin
Date	Activity	Quantity		Description	Total			
3/1/2023	Dividend			BOND FUND OF AMERICA CL F2 030123 4,445.44000 CUSIP: 097873822	120.20	120.20		
3/14/2023	Dividend			AMERICAN BALANCED CL F2 031423 3,084.50500 CUSIP: 024071821	359.04	359.04		
3/16/2023	Dividend			FUNDAMENTAL INVESTORS CL F2 031623 1,423.01100 CUSIP: 360802821	293.99	293.99		
Total Income and Distributions					\$773.23	\$773.23		

	<i>This period</i>	<i>Cash</i>	<i>Cash Sweep</i>	<i>Margin</i>
Closing Balance - Net Cash Equivalents	\$0.00	\$0.00	\$0.00	\$0.00



REALIZED GAINS/(-)LOSSES

This section provides estimated realized gains or losses for informational purposes only. Cost basis may be adjusted due to, but not limited to, the following: amortization, accretion, principal paydowns, capital changes, listed option premiums, gifting rules, inheritance step-up, or wash sales. Unless another method was in effect at the time of the trade, the trading tax lot relief method indicated on the first page of the statement was used to calculate gains or losses. Please review this information carefully for accuracy, and contact your Financial Advisor with any questions.

Mutual Funds	<i>Closing Transaction</i>	<i>Date Acquired</i>	<i>Date Sold</i>	<i>Quantity</i>	<i>Cost Basis</i>	<i>Sale Proceeds</i>	<i>Realized Gain/(-)Loss**</i>
Open-End Funds							
AMCAP CL F2 CUSIP: 023375827		12/21/15	01/05/23	5.064	129.69	153.54	23.85 (LT)
AMERICAN BALANCED CUSIP: 024071821		04/12/16	01/05/23	5.938	144.12	170.24	26.12 (LT)
AMERICAN BALANCED CUSIP: 024071821		04/12/16	02/16/23	79.959	1,940.60	2,362.00	421.40 (LT)
BOND FUND OF AMERICA CL F2 CUSIP: 097873822		04/12/16	01/05/23	8.531	110.05	97.77	-12.28 (LT)
BOND FUND OF AMERICA CL F2 CUSIP: 097873822		04/12/16	02/16/23	136.014	1,754.57	1,556.00	-198.57 (LT)
FUNDAMENTAL INVESTORS CL F2 CUSIP: 360802821		04/12/16	01/05/23	2.747	140.54	164.78	24.24 (LT)
FUNDAMENTAL INVESTORS CL F2 CUSIP: 360802821		04/12/16	02/16/23	36.409	1,862.69	2,332.00	469.31 (LT)
GROWTH FUND OF AMERICA CL F2 CUSIP: 399874825		04/12/16	01/05/23	2.961	120.10	145.58	25.48 (LT)
SMALLCAP WORLD CL F2 CUSIP: 831681820		04/12/16	01/05/23	2.714	117.26	157.42	40.16 (LT)

** Please note "Realized Gain/(-)Loss" does not equal total sale proceeds minus total cost basis if any cost basis amounts are missing.



HIGH PLAINS LIBRARY DIST
 FRIENDS & FOUNDATION
 ATTN NATALIE A WERTZ
 HORIZON ACCOUNT

March 1 -
 March 31, 2023
 Account Number:

REALIZED GAINS/(-)LOSSES continued

Mutual Funds	<i>Closing Transaction</i>	<i>Date Acquired</i>	<i>Date Sold</i>	<i>Quantity</i>	<i>Cost Basis</i>	<i>Sale Proceeds</i>	<i>Realized Gain/(-)Loss**</i>
<i>Open-End Funds</i>							
SMALLCAP WORLD CL F2 CUSIP: 831681820		04/12/16	02/16/23	5.268	227.61	335.00	107.39 (LT)
Total Mutual Funds					\$6,547.23	\$7,474.33	\$927.10
Total Realized Gains/(-)Losses					\$6,547.23	\$7,474.33	\$927.10
Total Net Short-Term (ST)					\$0.00	\$0.00	\$0.00
Total Net Long-Term (LT)					\$6,547.23	\$7,474.33	\$927.10
Total Net Other-Term (OT)					\$0.00	\$0.00	\$0.00

** Please note "Realized Gain/(-)Loss" does not equal total sale proceeds minus total cost basis if any cost basis amounts are missing.

STIFEL

Certain Definitions

“**Stifel**” means Stifel, Nicolaus & Company, Incorporated, Member SIPC and NYSE.

“**Stifel Banks**” means affiliated banks of Stifel, which may include Stifel Bank & Trust, Member Federal Deposit Insurance Corporation (“FDIC”); Stifel Bank, Member FDIC; Stifel Trust Company, National Association, Member FDIC; and Stifel Trust Company Delaware, National Association, Member FDIC. **Unless otherwise specified, products purchased from or held by Stifel in a securities account are not insured by the FDIC, are not deposits or other obligations of the Stifel Banks, are not guaranteed by the Stifel Banks, and are subject to investment risk, including possible loss of the principal.**

“**Stifel Smart Rate Program**” refers to a money market deposit account at Stifel Bank & Trust, Stifel Bank, Stifel Trust Company, N.A., or Stifel Trust Company Delaware, N.A., each an affiliate of Stifel, which is made available to eligible clients of Stifel. The deposits are insured by the FDIC, within applicable limits, and are not cash held in your securities account. For additional information and terms and conditions concerning these deposits, see the Stifel Smart Rate Program Disclosure, which is available at www.stifel.com/disclosures or from your Financial Advisor.

Account Disclosures

Errors and Inquiries – You should review this statement carefully and notify the Manager of the Office servicing your account of anything you believe to be incorrect. Any verbal communications should be re confirmed in writing to protect your rights, including rights under SIPA. All statements furnished to you shall be considered accurate, complete, and acknowledged by you unless you report any inaccuracies to the Manager. Instructions and inquiries should be directed to your Financial Advisor. When making inquiries, please mention your account number. Please notify us promptly of any change of address.

Investment Objective – All clients are requested to promptly notify us of any material change in their investment objective or financial situation in order to assist us in maintaining current background and financial information.

Pricing and Rating of Securities– The pricing of securities displayed on your statement is derived from various sources and, in some cases, may be higher or lower than the price you would actually receive in the market. If we cannot obtain a price, “N/A” appears. For securities listed on an exchange or trading continually in an active marketplace, the prices reflect market quotations at the close of your statement period. For securities trading less frequently, we rely on third party pricing services or a computerized pricing model, which may not always reflect actual market values. Similarly, some insurance product values provided by outside carriers may be valued as of a date other than the statement date. Bond ratings of securities were obtained from various rating services. There is no guarantee with respect to their accuracy. For current price quotes, please contact your Financial Advisor.

Cost Basis Information – All information provided with respect to cost basis is derived from transactions in the account or information supplied by other sources. There is no guarantee as to the accuracy of cost basis information or the profit and loss information provided for tax lots designated as noncovered. Stifel uses the first in, first out method when calculating the realized gain or loss on sale transactions unless a specific identification is made prior to settlement date. The gain or loss provided on your statement is informational only and should not be used for tax reporting. A 1099 including the cost basis for sale proceeds from covered tax lots will be provided after year end for tax reporting. Please inform your Financial Advisor if a cost basis is not accurate.

Transaction Dates – All securities transactions are reflected on a trade date basis. Settlement of trades will normally occur in three business days unless stated differently on your trade confirmation. Title to securities sold to you where Stifel has acted as principal shall remain with Stifel until the entire purchase price is received or until the settlement date, whichever is later.

Custody of Securities – Securities held by Stifel, Nicolaus & Company, Incorporated for you, but which are not registered in your name, may be commingled with identical securities being held for other clients by our Correspondent, the Depository Trust Company, or in similar systems.

Assets Held Away – You may purchase certain assets through Stifel, which will be held at a custodial institution other than Stifel. Where available, we include information about these assets on your statement. The custodial institution is responsible, however, for providing year end tax reporting information (Form 1099) and separate periodic statements, which may vary from the information included on your Stifel statement because of different reporting periods. Your Stifel statements may also reflect other assets “not held” at Stifel, in addition to those held by a custodial institution. The value and nature of these investments is generally provided by you. Stifel does not guarantee the accuracy of the information with respect to the value of these investments as reflected on your statement. Assets held away are not covered by Stifel SIPC.

Estimated Annual Income and Yields – Estimated annual income and yields are calculated by annualizing the most recent distribution and do not reflect historical experience or project future results. The yield information for the money market funds is based on historical performance; future yields will fluctuate. These figures have been obtained from sources believed to be reliable, but no assurance can be made as to accuracy. Before investing in any of these funds, carefully read the prospectus, which is available through your Financial Advisor.

Order Routing and Payment for Order Flow – In order to access a wide variety of execution venues, the firm does participate in the maker/taker model. Certain exchanges and other trading centers to which the firm routes equities and options orders have implemented fee structures under which broker dealer participants may receive rebates on certain orders. Under these fee structures, participants are charged a fee for orders that take liquidity from the venue, and provided a rebate for orders that add liquidity to the venue. Rebates received by the firm from a venue during any time period may or may not exceed the fees paid by the firm to the venue during that time period. Fees and/or rebates from all venues are subject to change. Stifel will provide customers additional information regarding average net fees/rebates paid/received upon written request. For venues from which Stifel receives a rebate, Stifel is considered to be receiving payment for order flow.

Additional information will be provided upon written request, and certain order routing information is available online at www.stifel.com/disclosures/best execution. On request of a customer and at no fee, Stifel will disclose to such customer the identity of the venue to which such customer’s orders were routed for execution in the six months prior to the request, whether the orders were directed orders or non directed orders, and the time of the transactions, if any, that resulted from such orders. Orders may be routed and executed internally through Stifel’s trading desk. In such instances, Stifel stands to share in 100% of remuneration received (in the case of orders executed as agent) or profits or losses generated (in the case of orders executed as principal) as a result of internalizing such orders. Customers may mail their inquiries to: Stifel Attn: Equity Trading Compliance, One South Street, Baltimore, Maryland 21202.

Tax Information – Although your statement may describe certain items as Federally tax exempt, this is for information purposes only. When reporting your taxes, please rely exclusively on the substitute Form 1099 you will receive from us after year end for your taxable accounts. (For Retirement Accounts, Form 1099R will report distributions from the account rather than income and dividends or proceeds from sales.)

SIPC Protection – Stifel is a member of the Securities Investor Protection Corporation (SIPC). SIPC coverage protects securities customers of its members up to \$500,000 (including \$250,000 for claims for cash). An explanatory brochure is available upon request or at www.sipc.org, or investors may contact SIPC at (202) 371 8300. Stifel has purchased additional securities coverage of \$149,500,000 and cash coverage of \$900,000 for a total of \$150,000,000 of securities coverage and \$1,150,000 of cash coverage, subject to the terms and conditions of the policy, with an aggregate limit of \$300,000,000. (For more information, visit: www.stifel.com/disclosures/asset protection.) This coverage does not protect against market losses and does not cover securities not held by Stifel.

LIBOR Transition – Stifel is preparing for the discontinuation of LIBOR (the London Interbank Offered Rate), a key benchmark rate, to new alternative rates. Regulators have called for a market wide transition away from LIBOR. Certain investments you hold might use LIBOR as a benchmark. You should prepare for LIBOR to be discontinued and understand how this change may impact your investments. We have established a webpage as a resource for clients containing important information, including risks and disclosures regarding the LIBOR transition at www.stifel.com/disclosures/LIBOR 21.

Margin Accounts – If you have a margin account, this is a combined statement of your margin account and special memorandum account (“SMA”) maintained for you under Section 220.5 of Regulation T issued by the Board of Governors of the Federal Reserve System. The permanent record of the (“SMA”) as required by Regulation T is available for your inspection upon request. If you have applied for margin privileges and have been approved, you may borrow money from Stifel in exchange for pledging assets in your account as collateral for any outstanding margin loan. The amount you may borrow is based on Regulation T, Stifel’s internal policies, and the value of securities in your margin account. Securities held in a margin account are identified by the word “margin” on your statement. Stifel reserves the right to limit margin purchases and short sales and to alter its margin requirements and due dates for house or other margin calls in accordance with the Firm’s guidelines, market conditions, and regulatory margin requirements.

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Account Disclosures Continued

Margin Account Interest Charges – The margin interest period includes the second to last day of the prior statement period through the third day prior to the last day of the current statement period. The margin interest charge is computed by multiplying the rate of interest by the average net daily settled debit balance and a fraction, the numerator of which is the number of days the debit balance existed, and the denominator of which is three hundred sixty (360). The rate of interest is determined by the cost of borrowing money and is subject to change without notice. The average net daily settled debit balance includes any settled credit and settled debit balances in your cash and margin accounts during the period. Please review the “Statement of Credit Terms” you have already received for further information.

Fully Paid Lending Participants – Without waiving any rights given to you, it is understood and agreed that the provisions of the Securities Investor Protection Act of 1970 may not protect the lender with respect to loaned securities hereunder and that, therefore, the collateral held for you may constitute the only source of satisfaction of Stifel’s obligations in the event Stifel fails to return the loaned securities.

Late Charges – If transactions in your account result in a debit balance in your cash account and you do not make payment by the settlement date, you may be subject to interest charges.

Free Credit Balances – Customer Free Credit Balances may be used in this Firm’s business subject to the limitations of 17CFR Section 240, 15c3 3 under The Securities Exchange Act of 1934. You have the right to receive from us in the course of normal business operations, upon demand, the delivery of: a) any Free Credit Balances to which you are entitled, b) any Fully Paid Securities to which you are entitled, c) any Securities purchased on margin upon full payment of any indebtedness to us. If you participate in Stifel|Advantage or Stifel Prestige® Accounts, the payment to you of a Free Credit Balance may be subject to the cancellation of any commitment made in respect to your account for the payment of checks, ATM Card, or Point of Sale transaction charges, or other debit card transactions.

Option Accounts – 1) Commissions and other charges related to the execution of option transactions have been included on confirmations for such transactions, which have already been sent to you, and copies of confirmations are available upon request; 2) should you have any changes in your investment objective or current financial situation, you should advise your investment professional immediately; and 3) assignment notices for option contracts are allocated among client short positions pursuant to an automated procedure that randomly selects from all client short option positions those contracts that are subject to assignment, which includes positions established on the day of assignment. Additional information pertaining to the procedures used for random selection is available upon request.

Complaints – Complaints relating to your account(s) may be directed to Stifel, Legal Department, 501 North Broadway, St. Louis, Missouri 63102 or by phoning (800) 488 0970 or (314) 342 2000.

Lost Certificates – In the event your statement indicates that securities were delivered out of your account in certificate form and you have not received them, it is understood that you will notify Stifel immediately in writing. If written notification is received within 120 calendar days after the delivery date, as reflected on your statement, the certificate will be replaced free of charge. Thereafter, a fee for replacement may apply.

Dividend Reinvestment – (Optional) The dollar amount of Mutual Fund distributions, Money Market Fund income, or dividends on other securities shown on your statement may have been reinvested into additional shares. You will not receive confirmations for these reinvestment transactions. However, information pertaining to these transactions which would otherwise appear on confirmations will be furnished to you upon written request. In dividend reinvestment transactions, Stifel may act as your agent and receive payment for order flow. The source and nature of such payment will be furnished to you upon written request to Stifel or your introducing firm. If Stifel is currently a market maker in the eligible security, Stifel will purchase, as principal for you, additional shares at the opening market price.

Stifel Information – A Statement of Financial Condition of Stifel, Nicolaus & Company, Incorporated is available for your inspection at any of our offices, or a copy will be mailed to you upon request.

Investor Education and Protection – Under the Public Disclosure Program, the Financial Industry Regulatory Authority (“FINRA”) provides certain information regarding the disciplinary history of FINRA members and their associated persons via FINRA’s BrokerCheck Hotline (toll free (800) 289 9999) or on the FINRA website at www.finra.org, including an investor brochure that includes information describing FINRA BrokerCheck. Stifel, Nicolaus & Company, Incorporated is registered with the U.S. Securities and Exchange Commission and the Municipal Securities Rulemaking Board (“MSRB”). Additional information may be obtained from the MSRB website at www.msrb.org, including an investor brochure that is posted on the website describing the protections that may be provided by the MSRB rules and how to file a complaint with an appropriate regulatory authority.

ERISA Section 408(b)(2) Notice – For Service Provider Fee Disclosures under ERISA 408(b)(2), please see www.stifel.com/disclosures/ERISA. Please direct any questions you may have to your Financial Advisor.

Notification of Change in Circumstances and Availability of Investment Advisory Disclosure Brochures – In the event that there are any material changes in your financial situation, investment objective(s), risk tolerance, or instructions regarding your account(s), please promptly report such changes to your Financial Advisor to ensure that your investment advisory accounts are being managed based on the most current information. You should review Stifel’s Form ADV Part 2A (Disclosure Brochure) for information and disclosures relating to Stifel’s investment advisory services (available at: [www.stifel.com/disclosures/investment advisory services/program disclosures](http://www.stifel.com/disclosures/investment%20advisory%20services/program%20disclosures)), including (but not limited to) a discussion of the various conflicts of interest to which our firm may be subject in the provision of investment advisory services to you.