



Friends News and Notes

Friends of Libraries Section — A Network of Library Advocates in New York State

www.NYLA.org/Friends

Volume 10, #3 -- July 2024

FLS to Host In-Person Friends Group Meet-up Thursday, August 15

Join us for the Friends of Libraries Section (FLS) of the New York Library Association (NYLA) Regional Friends Group Meet-up at the Beekman Library in Hopewell Junction on Thursday, August 15 from 2:00 - 4:00 pm. This event is open at no charge to both FLS/NYLA members and non-members. However, advanced registration is required. To register please visit, <https://bit.ly/3VWB3aS> and complete one form for each attendee. Registration closes on Thursday, August 8th at 4:00 pm.

This is a great opportunity for Friends from your library to meet with other Friends from around the state, exchange ideas, and make new contacts. When completing your registration, you'll have the opportunity to drive the topics for discussion including:

- ✓ New fundraising ideas (excluding book sales)
- ✓ Book Sales
- ✓ Membership, Recruitment and Retention
- ✓ Outreach (Newsletters, Tabling, Social Media)
- ✓ A topic of interest for your group

Questions about this event can be sent to Kerstin Cruger, FLS Past President at fls.kerstin.cruger@gmail.com. Please put Regional Friends Group Meet-Up in the subject line.

We look forward to seeing you!

[Directions to the Beekman Library](#)
(Google Maps)
11 Town Center Blvd
Hopewell Junction, NY 12533

Registration link:



Leadership at Every Level: Fund-Protect-Empower **Friends Preview** NYLA 2024 Conference

FLS strives to bring dynamic conference programming on Friends topics for Friends volunteers, library staff, and trustees.

Here's this year's line-up:

Forming Friends: The Board Game!
Wednesday, Nov 6 in the afternoon

Teaming Up: Success in Community Partnerships
Thursday, Nov 7 in the afternoon

Hello, Creating A Board and More
Thursday, Nov 7 in the afternoon

1-2-3: Finding Valuable Volunteers
Friday, Nov 8 in the morning

Friends Board Development and Management Strategies
Friday, Nov 8 in the morning

Fundraising Without Book Sales
Friday, Nov 8 in the afternoon

Keep It Growing! Strengthening Your Friends of the Library Group
Saturday, Nov 9 in the morning over both program slots

See more program details on page 3.

Visit the [NYLA Conference page](#) for registration information and updates on programs and events. Registration opens July 29. Reduced rates are available for NYLA members registered as Friends, Trustees, Students, and Retirees.

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FLS creates a network to connect and inspire Friends groups in all types of libraries to support the New York library community. FLS, a unit of NYLA, embraces and promotes diversity and inclusion in all their forms.



A Message from FLS President Chris Lund

Welcome to the Summer edition of the FLS newsletter! I hope you're all managing to stay cool during this unreasonably hot season. As always, we've got lots of fun and exciting things in the works here at FLS headquarters,

so I'm just going to dive right in.

For starters, I want to thank all of you who voted in our recent board elections. Congratulations to Meg Van Patten, Terry Mulee, Jen Allen, and Meg Sgombick on being elected to the posts of Vice President/President-Elect, Treasurer, and two positions as Members at Large, respectively. Meg and Meg will both be starting in their first full terms after completing partial terms with the board in these same titles, while Terry will be entering her second full term as Treasurer, and Jen will be joining the board formally after working with us for the past year as FLS Coordinator for National Friends of Libraries Week. We're also still looking for members to serve as Second Vice President and as our final Member at Large. To learn more about either of these roles, please email me at christopherlundesq@gmail.com.

As the summer flies by far too rapidly, we are fast approaching our annual in-person FLS Board meeting, which will be held this year on Thursday, August 15th at the Beekman Library in Hopewell Junction. That will be followed in the afternoon with our Regional Friends Group Meet-up at 2:00. These gatherings are always a fun time and they provide a great opportunity to escape from the Zoom box and interact with others in three dimensions for a change. (As an ardent introvert, I'm often happy to stay behind the laptop screen, but even I occasionally enjoy venturing out to experience actual human-to-human contact, even if it means I have to go through the unpleasant task of putting on shoes, and actually keeping them on all day!) This is also an excellent way to network with representatives from other Friends groups to swap ideas, stories, and other thoughts. As somebody who has shamelessly "borrowed" many ideas from many other Friends groups, I can personally attest to the value of these types of discussions and interactions. For more info on this event see the article on page 1. You can register at <https://bit.ly/3VWB3aS>. Please complete a form for each person attending the Meet-up.

Speaking of events taking place in three dimensional space, be sure to take a look at our annual conference preview on pages 3 and 4. We've got a great lineup of fun and interesting programs for Syracuse this year, including in-depth guidance on how to build a new Friends group and/or

maintain an existing one, tips on the ever-challenging task of recruiting new volunteers, advice on how to develop and manage your group's executive board, strategies for building successful community partnerships, the ever-popular topic of fundraising ideas that aren't book sales, and a two-part session on how to grow and strengthen your existing Friends group. And if you're able to come in on Wednesday for our pre-conference session, you'll even have the chance to gain CE credit by playing a board game that's been custom-built just for us (and really, how could earning Continuing Education credits get any more fun than that?!).

As always, thanks for being a member of FLS, and I hope to see all of you soon at one (or all) of our upcoming events.

Transformational Library Stories

We want to give a shout out to the Penfield Public Library Foundation (PPLF), a nonprofit that works to enhance financial support for the Penfield Public Library, a suburb of Rochester. On their webpage, they have a special feature under "News," their Transformational Library Series blog. <https://www.penfieldlibraryfoundation.org/news>

These "library lover stories" share deeply personal insights into library patrons and how their lives are impacted by library services. In a move that highlights the united front of these two independent organizations that each support the Penfield Public Library, the first article, "How the Library Changed My Life, as told by Mike Sanchez," was written by the President of the Foundation from an interview with the Co-President of the Friends of the Penfield Public Library. To quote Mike, "It all started with a lady who took kids to the library. I did the same thing with my kids." Mike embraced "paying it forward" as he took on a leadership role with the Friends.

Mike's poignant story was an admirable start to this series, conceived by Kathy Weber, PPLF, when she wanted to feature how the library had changed the lives of library users in her community. The next story, "Interview with Madison, age 7, and her mother, Heather" shared this young reader's grounding in what her public library could offer her when she became an avid reader at age 4! The latest blog post, "How A Book Changed the Course of My Life" outlines how a single book on natural childbirth changed a young mother's experiences giving birth and her path in life to help others when she ultimately became a doula.

PPLF President Kathy Weber says, "It's so important to remind people of how life-changing libraries can be.

~ [continued on page 6](#) ~



Leadership at Every Level: Fund-Protect-Empower NYLA 2024 Conference, November 6 - 9 Friends Preview continued

All are invited to spend a few days in Syracuse at the OnCenter for #NYLA2024.

On each day of the conference you'll find programs with topics of interest for Friends. In addition to networking with other library Friends, staff, and trustees, you can attend sessions where you will learn ways Friends can build on what they are already doing to support their libraries.

Kicking off the conference, folks are invited to "Learn through Play!" at a pre-conference continuing education workshop with Stephanie Cole Adams, Esq.

Forming Friends: The Board Game!

Wednesday, Nov 6 in the afternoon

Come join in the fun of a new collaborative board game that takes players through all the phases and legal ins and outs of Friends groups. As many Friends and libraries know, a Friends group isn't all book sales and donations...it's planning, formal filings, accounting, and ongoing not-for-profit compliance. With all those obligations, how do we keep running a Friends group fun? Come and play "Forming Friends." Written, designed, and presented by attorney Stephanie (Cole) Adams, she'll take players through all the phases of Friends formation and ongoing operations. Everyone wins if a Friends-funded initiative happens in the end!

Teaming Up: Success in Community Partnerships

Thursday, Nov 7 in the afternoon

Ariel Bero will discuss the positive impact that community collaborations have had on her library, helping the library to become 2023 Central NY Library of the Year. Some examples include a city-wide Safety Week and a Summer Long Parks Passport series in collaboration with the Parks and Recreation Department. Attendees will be provided with an array of programming and outreach ideas that can help any size library be more present in their communities through these important partnerships.

Hello, Creating A Board and More

Thursday, Nov 7 in the afternoon

Tony Iovino, a librarian/attorney who has advised dozens of Friends groups and other non-profit organizations, will take you through the beginning steps of creating a Friends group: the legal issues, how to find an initial Board, and more. He'll discuss the best practices that can make a Friends group invaluable to a library and the tactics that can be used to remedy a troublesome group--or invigorate a stale one.

1-2-3: Finding Valuable Volunteers

Friday, Nov 8 in the morning

Scott McLeod, Director of Volunteer Services, will detail the process used at Queens Public Library to find skilled and

passionate Friends volunteers that could also increase your chances of bringing them to your door. Nearly 1 in 4 people in the United States volunteer each year with over 60 million completing an estimated 4.1 billion hours for organizations across the nation. However, not all volunteers are made equal. You need to make a few important choices to bring the right people to your cause. Scott will outline the methodology to create an environment that attracts volunteers by connecting them to your mission and helps to prepare them to become brand ambassadors able to convey the impact of your work to others. Attendees will be able to develop clear and concise service descriptions, deliver detailed orientations and information sessions, create a menu of projects that appeal to multiple audiences and schedules, and incorporate retention techniques to acknowledge and celebrate volunteers.

Friends Board Development and Management Strategies

Friday, Nov 8 in the morning

Michele Wernsing of the Friends of the Naples Library will present strategies for recruiting the key leadership needed by your Friends Board. Learn the process to find volunteers to serve on the Executive Board of your Friends group and ensure that your Board remains viable following its formation. Discussion will include ways to find and evaluate individuals who would be a good fit for your board and how to screen out those who might not be such a good fit. This will allow your Board to work productively with the library board and staff, effectively target donors and solicit funds, and maintain the trust and good will of your Friends group members.

Fundraising Without Book Sales

Friday, Nov 8 in the afternoon

Is your Friends Group looking for creative new ways to fundraise beyond the typical annual or semi-annual book sale? Our panel will share several successful and exciting alternatives: Lynda DeOrio, Friends of Seymour Library (Auburn, NY), will discuss a garden tour organized by the Friends; Michele Merwarth will talk about the birdhouse construction project organized by the Friends of the Marcellus Free Library; and Jen Allen, Executive Director of the Friends of the Saratoga Springs Public Library, will describe their annual Saratoga Book Festival.

Keep It Growing! Strengthening Your Friends of the Library Group

Saturday, Nov 9 in the morning over both program slots

FLS is excited to bring this popular workshop to Syracuse for

~ [continued on next page](#) ~

"FLS Getting Started" in Clifton Park

A two-hour workshop can only skim the surface when outlining the myriad details needed to establish a new Friends group. But the 31 participants at the Getting Started: Creating and Supporting a Friends Group for Your Library session, held at the Clifton Park – Halfmoon Public Library (CPHL) on Thursday, May 9, were up to the task, coming in teams of two or three to learn how to work through a step-by-step process to start a volunteer support group for their community library.

The workshop was jointly sponsored by the Southern Adirondack Library System, the Upper Hudson Library System, and the Mohawk Valley Library System. It was graciously hosted by Jim Foster, CPHL Assistant Director for Public Service and Staff Liaison to the Friends of CPHL. Friends members greeted workshop participants, provided copious sumptuous refreshments, and staffed the registration table in this well-appointed training facility.

This FLS regional workshop brought the FLS training team to the Capital Region so community volunteers, trustees, and library staff could attend the session close to their home. But since the workshop was open to everyone, we were pleased to also have participants from the Finger Lakes and Mid-Hudson Library Systems. The final attendance represented 18 libraries from five library systems. Participants included system staff, library trustees, library directors and managers, officers in existing Friends groups, and community volunteers.

Both new and experienced Friends group will want to attend Keep It Growing! Strengthening Friends Groups as part of the NYLA Annual Conference in Syracuse. This FLS workshop will be presented in two back-to-back program slots on Saturday, November 9. We will focus on reinvigorating the Friends so the organization can carry out their mission for their community library. Get tips on how to constantly work on volunteer engagement with the library and membership recruitment. Renew and engage the members of your group, turning your core supporters into a strong, active volunteer force that can help support the library with extras not attainable with its standard operating budget.

Help FLS reach even more libraries that could benefit from a Friends of the Library group. Systems, libraries, and individual Friends groups all have hosted these FLS workshops. Contact Lisa Wemett, FLS Coordinator for Professional Development, at FLS.NYLA@yahoo.com if you would like to book either of the workshops in your region.

Top: Volunteers and staff at CPHL helped host "Getting Started." L-R: Lanna Langlois (Co-President of the Friends), Michele Gorab (Chair of the Friends Scholarship Committee), and Tricia McEnroe (FCPHL Co-President).

Left: The FLS training team was greeted by these smiling faces – 31 participants eager to learn how to establish and support a Friends group for their libraries! (Photos by Erica Freudenberger)

Friends Conference Preview

[from previous page](#)

Keep It Growing! continued

library staff and community volunteers who want to grow an established Friends group. Lisa C. Wemett and Joyce Laiosa will explore ways to maintain a Friends organization and continue their work for the library into the future. They'll be emphasizing best practices using tried-and-true ideas from myriad active Friends groups.

Participants are requested to attend the entire presentation which spans both program slots on Saturday morning and includes a short break.

Part 1 will explore some practical ways that Friends can reimagine their group's leadership with presidential teams, committees, and task forces to allow volunteers flexibility and reasonable time commitments. Clear expectations, open communications, and delineation of roles for staff, trustees, and community volunteers are all vital, achievable steps. Encouraging leadership development, succession planning strategies, and volunteer recognition help build meaningful relationships with volunteers leading to long-term retention.

Part 2 covers best practices for volunteer recruitment and engagement in Friends groups. Membership drives and other tactics for "Friends-raising" will keep your library's Friends group vital, sustaining the organization long-term. Explore some exceptional ways to network within your community. Constantly sharing your message will revitalize your supporters and maintain the group's crucial membership base, with both donors and active volunteers.

Be sure to join us for a visit to Syracuse this fall and the opportunity to learn about ways to empower your Friends organization. NYLA conference information can be found at <https://www.nyla.org/annual-conference>. Registration is slated to open on July 29. Watch for conference announcements in NYLA emails and social media channels.



Planning an Annual Appeal

by Lisa C. Wemett

At the 2023 NYLA Annual Conference in Saratoga Springs, FLS was fortunate to have Judy Grattan, President of the Friends of the Poestenkill Library (Upper Hudson Library System), as a panelist to share the group's annual direct mail effort, "Light Up the Library." 2023 marked the 22nd anniversary of this highly successful campaign.

Lest you think summer is too early to embark on an annual campaign project, the Poestenkill Friends would empathically say, "Start now—October will be here before you know it!" The group has an extensive task list, with responsibilities assigned to seven key volunteers: the President, the Vice-President, Treasurer, Recording Secretary, Membership Secretary, the Acknowledgement Volunteer (in charge of donor relations), the Mail Receipt Volunteer, and the Database Volunteer. Breaking tasks into manageable bites with clear direction is the epitome of the adage "many hands make light work," or in this case: LIGHTS!

The Holiday Lights Appeal raises funds to purchase special collections for the library, underwrites programs for all ages, and has upgraded the library's Wi-Fi. The Friends have a long list of projects supported through this fundraising effort which focuses on decorating the library for the holidays both with festive wreaths and electric candles in the library's 18 windows. Donations are solicited for the wreaths (\$75 each) and the candles (\$100 each) with cards placed next to the decorations to identify the donor and the recipient being honored. Many gifts honor a special person in the donor's life or are given in memory of a loved one. Those donors contributing \$100 or more become honorary Friends for the following year. Smaller contributions are welcome of any amount.

The Friends President and Vice President get the ball rolling by scheduling planning meetings for the group, recruiting volunteers for all the tasks (except for the actual decorating team that installs the wreaths and lights), creates the brochure for the year which focuses on current library needs (e.g., more e-books), and prints the brochures. They handle the publicity for the event and prepare the text of the acknowledgment letters. As the appeal progresses, they share how the campaign is going to help keep the momentum. Donor lists are posted in the library.

The Recording Secretary updates the mailing list from the prior years, determines the supplies needed for the mailing, generates the mailing labels, organizes a meeting for a team to prepare the mailing in November, and delivers the prepared letters to the post office to be sent out over Thanksgiving weekend. The Membership Secretary recruits the volunteers to do the decorating, secures the decorations, and supervises the installations. This volunteer is also responsible to place the donor names by the decorations and later oversees the removal and storage of the

decorations for the following year.

The Mail Receipt Volunteer eagerly opens the return envelopes as they come in during December. The donor amounts are noted, names of honorees are tracked, and the Treasurer notified of the weekly receipts. The gift slips returned with the donations are provided to the Acknowledgement Volunteer who will mail thank you letters in December and into January noting the contribution amounts. Ultimately the Database Volunteer tracks the gifts in the donor database and creates a list of donors to be shared with the library. The donor list is reviewed closely. If no gifts are received after three years, the name is dropped from the file. New members to the community, identified through records of home sales, are added each year.

All through the process, the Friends Treasurer purchases the supplies needed (e.g., envelopes), collects the checks to be deposited, keeps careful records, reconciles the donations with the database updates, and happily writes a check to the library in February. It's a full circle moment in February or March when the volunteers gather to plan for the next appeal.

In 2022, 220 letters raised \$8,700 for the library. The 2023 appeal received 131 replies from 250 letters, with contributions totaling nearly \$7,400. We hope you'll use this article to organize your own annual appeal, whenever it occurs during the year. Holiday decorations are not required, but the bright lights, holiday bows, and community spirit can certainly be replicated for the library your Friends support!

For more information on the Friends of the Poestenkill Library's campaign, see "Fundraising Refresh" by Jennifer Allen in the December 2023 issue of "Friends News and Notes" on page 8 (available online for FLS members).



Poestenkill Library decorated by the Friends of the Poestenkill Library as a part of **The Holiday Lights Appeal**

Tabling

According to the Cambridge Advanced Learner's Dictionary & Thesaurus, "tabling" is the act of setting up a table in a public place, in order to provide people with information or to sell something.

Now many grammarians are purists and say you cannot make a verb out of a noun. But sorry, it happened, and the term "tabling" has come into widespread use. Tabling is a very common practice in business and nonprofit circles. You might call it "outreach." Outreach endeavors often focus on populations that do not have easy access to library services. Outreach helps raise awareness of the library and its services by increasing visibility in the community.

In a similar vein, every weekday morning, Gayle King, a host on CBS Mornings, enthusiastically embraces the co-hosts' daily segment "Talk of the Table" because "We're at a table and we be talkin'!" So take the hint: your Friends group needs to get a table and get travelin'!



Partnering and showing up at public events gets the Friends noticed. Summer is the perfect time to take up space in the local farmers' market. Travel in a team of two. Dress the part: wear T-shirts with the Friends logo or invest in cobblers' aprons embroidered with the logo. When folks approach, give your elevator speech on who the Friends are and what they do. There will always be initial confusion: "Oh, I have a library card. I'm a member of the library." Make the analogy that the Friends are to the library what the PTSA is to a school. Lightbulb goes on: "Oh, you're a booster club. I get it." Be willing and able to sign up new members on the spot. Consider creating a QR code to take folks directly to your online membership page with their phones.

Throw in a mini book sale of easily portable paperbacks and make a little money, too. Spin a wheel; win a mini door prize like a pencil or refrigerator magnet. Have a drawing for a pile of new books (and later use the names/email addresses to create a group where you can market Friends events). Whatever you can do to attract folks to your table, give it a

try, but always give away a membership form, a bookmark with the Friends webpage, or a coupon for a free book at the next book sale. What would draw you in and make you follow up with a support organization like the Friends?

Jim Foster, Assistant Director for Public Service and Staff Liaison to the Friends of the Clifton Park – Halfmoon Public Library, enthusiastically endorsed tabling at the 2023 NYLA Annual Conference session, "Friend-Raising to Revive and Rekindle Growth." Events around town are plentiful and the Friends table has been set up at concerts, an expo of resources for older adults, school open houses, community volunteer fairs, summer outdoor movies, the town swimming pools, history festivals, craft fairs, and of course, summer learning program sign-up day at the library. (You are looking for "younger" Friends, aren't you? Enroll families!) Face-to-face recruiting and being library evangelists is your mission. You don't even have to ring any doorbells! Enthusiastically embrace new members and get them involved in your Friends projects. It all starts with a table.

Transformational Stories

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Libraries, schools, mentors, and those special people who are passionate about advocating for young people and guiding them toward experiences that will help them grow: there are so many ways to change lives for the better. Libraries, though, offer more choice—an invitation to learning, activities, and an equal portion of kindness and support."

We hope you will take time to read these interviews and think about the impact that your Friends group has in your community, supporting extras for the library and services that cannot be taken for granted. In these cases, a thousand words paint quite the picture! Consider crafting your own blog series, Facebook posts, or stories on the Friends webpage that highlight your volunteers, your officers, and your residents. And please share when you do!

Visit Syracuse Resources for November's NYLA Conference

[Syracuse Digital Visitors Guide](#)

[Downtown Syracuse Guides](#) including a [historic walking tour](#) and a [parking guide](#)

A note from your newsletter editor: Don't miss [Salt City Market](#), near the Marriott Syracuse Downtown (conference hotel) at 484 S. Salina Street. My favorite restaurant there is [Baghdad](#), but you'll also find [Salt City Bar](#), and [Cake Bar](#)

FLS Connections! Takes on Succession Planning

It's baseball season, so let's just say we "hit it out of the park!" Christopher Lund's presentation on "Preparing Friends Organizations for Succession Planning" was a major draw for our first-ever **FLS Connections at Night!** Sign up for this topic was strong, with 73 folks pre-registered representing 54 libraries from all over the state. Our event reached well over 50 people and we were excited to welcome the group at Schroon Lake Public Library (Clinton-Essex-Franklin Library System) that had a watch party of four folks!

Christopher outlined four steps in preparing a Friends Group for succession: (1) Assessment, (2) Documentation, (3) Implementation, and (4) Transition. When he became President, his highest priorities were in developing written

documents concerning legal and organizational aspects of the group, such as by-laws, taxes, signatories on bank accounts, fundraiser vendor accounts, etc. Using Chris's four steps as a guide, your Friends leaders can make it less daunting to recruit a new team, as the roles and responsibilities of key volunteers are clearly defined and established in these core documents.

Everyone who registered received detailed notes of the presentation plus a thorough transition statement Christopher developed for the Friends of the Cortland Free Library when he moved away. Both of these documents can be found at the end of the newsletter. Many thanks to Christopher for such a detailed look at succession planning.

NY Friends Garner National Award

by Jennifer Allen, FLS Coordinator for NFOLW

The 18th annual National Friends of Libraries Week (NFOLW) is set to take place from October 20-26, 2024. This week presents an ideal opportunity for your Friends' group to shine! Use this special week to boost your group's visibility in the community, raise awareness, and grow memberships. It's also a wonderful occasion for your library and Board of Trustees to acknowledge the valuable work you do in supporting the library.



In 2023, the Friends of the Bernardsville Public Library in New Jersey and the Friends of the Sea Cliff Library in New York were recognized for their outstanding celebratory efforts from their submissions to United for Libraries 2023 National Friends of Libraries Week Awards.

The Friends of the Bernardsville Public Library offered creative and impactful programs, including participation in the local farmers market, offering a wine tasting party in collaboration with the local businesses' Shop Sip event, and organizing diverse activities like a spelling bee, friendship bracelet workshops, and résumé and interview sessions. Their efforts not only engaged the community but also raised significant funds for the library.

FLS gives a shout-out to the Friends of the Sea Cliff Library in the Nassau Library System. The group was honored for their "Books are Magical" theme, which attracted new audiences with a magic show. They provided branded card decks and magic wands to children, collaborated with library staff for event planning, and promoted membership through

flyers, resulting in on-the-spot sign-ups and donations to the Friends. Their initiative ensured that the event was accessible to everyone by omitting an admission fee.

Have you considered applying for the NFOLW Awards? This could be your chance to receive one of two monetary awards to support your Friends group celebrations during the week. You can apply at

https://www.ala.org/united/grants_awards/friends/friends-week.

Here are some more ideas to help you celebrate NFOLW this fall:

- Hold a membership drive
- Host a fundraising event to raise awareness and funds for your library
- Organize a bookmark contest to engage the community
- Conduct a book sale
- Host a volunteer recognition event
- Celebrate library staff with a party—everyone loves a celebration!
- Utilize social media to showcase all the great work you are doing

For additional resources, visit the ALA website at https://www.ala.org/united/events_conferences/folweek to access free public relations and marketing materials to promote your group before and during NFOLW. Available resources include a sample press release, graphics, a letter to the editor, and more. NFOLW assets are also available for purchase from the ALA Store at www.alastore.ala.org.

We look forward to hearing about your group's celebrations and events during this year's NFOLW. Please email details and photos to FLS.nyla@yahoo.com.

FLS Executive Board and Auxiliary Volunteers

Officers:

President: Chris Lund
FLS Councilor: Jerrie Grantham
First Vice President: Meg Van Patten
Second Vice President (Membership): Amy Discenza
Secretary: Joyce Maguda
Treasurer: Terry Mulee
Immediate Past President: Kerstin Cruger
President Emeritus: Randall Enos

Members At Large:

Matt Corey
Jim Foster
Mary Giardini
Erica Freudenberger
Meg Sgombick
Arlene Vaquer
Ristiina Wigg

NYLA Committee Representatives:

Awards Committee: Joyce Laiosa
Communications Committee: Terry Mulee
Conference Ambassador: Meg Van Patten
Continuing Education Committee: Matt Corey
Governance: Chris Lund
Intellectual Freedom Committee: Chris Lund
Legislative Committee: Jean Sheviak
Membership Committee: Amy Discenza
NYLA Nominating: Erica Freudenberger
Sponsorship/Fundraising: Terry Mulee
FLS Auxiliary Volunteers:
FLS Casey Award Coordinator: Lisa C. Wemett
FLS Scholarships Coordinator: Marie Bindeman
Coordinator for Professional Development: Lisa C. Wemett
Marketing Coordinator: Meg Sgombick
Nominating Committee Chair: Kerstin Cruger
NFOLW Coordinator: Jen Allen
Regional Workshop Trainers: Joyce Laiosa, Lisa C. Wemett

Contact us anytime at FLS.NYLA@yahoo.com
Visit the Friends of Libraries Section at
www.NYLA.org/Friends

FLS is not publishing email addresses in an attempt to eliminate phishing scams. Please use the NYLA Membership Directory to find contact information or use the FLS email. Please indicate your email recipient. We apologize for any inconvenience.

This newsletter is a publication of the Friends of Libraries Section of the New York Library Association.
Newsletter Editor: Terry Mulee
Contributors: Lisa C. Wemett, Kerstin Cruger, Meg Van Patten

NYLA leads, educates, and advocates for the advancement of the New York library community.

NYLA FRIENDS OF LIBRARIES SECTION

Membership Benefits

First access to publications and learning opportunities to engage and inspire your Friends group 

 Reduced NYLA membership and NYLA Annual Conference rates

Opportunities to network and connect with Friends across New York State 

 Awards and scholarships, including the FLS Daniel W. Casey Library Advocacy Award and the FLS Randall Enos Conference Scholarship

www.nyla.org/friends

ABOUT FLS

The Friends of Libraries Section (FLS) is a unit of the New York Library Association.

FLS's mission is to create a network to connect and inspire Friends groups in all types of libraries to support the New York library community.

FLS is for Friends of the Library and for those who support their mission.

Looking to organize a Friends group? FLS has resources for that.

JOIN NYLA / FLS

Maintaining a healthy membership helps ensure that FLS can continue our work.

NYLA offers personal and group membership rates for Friends of the Library. Already a NYLA member? It's easy to add FLS as a Section.



www.nyla.org/join

Volunteer with FLS

-  Grow your network of Friends
-  Develop leadership skills
-  Make a difference



Scan the code or complete an FLS Volunteer form at jotform.com

FLS Connections!
Tuesday, April 9, 2024 | 7 to 8:15 p.m.
A virtual meet-up sponsored by the Friends of Libraries Section
of the New York Library Association
Topic: Preparing Friends Organizations for Succession Planning

Lisa Wemett introduced Christopher Lund, FLS First Vice President/President-Elect, to discuss the topic, Preparing Friends Organizations for Succession Planning. Lisa shared that this evening's meeting is the 11th one in the Connections series, but the first one at night. Registrations totaled 73 folks and 45 logged in.

Succession Planning is probably not a subject that immediately comes to mind for Friends officers and key volunteers. But nearly every Friends group must handle unexpected emergencies and volunteer transitions. How can you be better prepared to help your Friends group succeed long term?

Christopher Lund is currently Principal Law Librarian for the New York State Court System's 6th Judicial District which covers ten counties in the Southern Tier and Finger Lakes Region. He is responsible for overseeing and managing the courthouse public access law libraries in all of these counties. Before relocating in November 2023 and changing his current home library to the George F. Johnson Memorial Library in Endicott, Chris was President of the Friends of the Cortland Free Library (a member of the Finger Lakes Library System) for four years. When Chris first took over, the group had little structure and was facing other challenges. Thankfully, Chris began to restructure the way the Friends was managed and maintained. When he knew he would be leaving, Chris began preparing for the handover to the new team.

Chris shared that, based on his own experience as a Friends President, there are four steps in preparing a Friends Group for succession. These steps are: 1) Assessment, 2) Documentation, 3) Implementation and 4) Transition.

For the first step, **Assessment**, it is important to assess the organization's current procedures. For example, where are the files located, both physically and electronically? How are they organized? What are the procedures for storing them? How are meetings scheduled and structured? What are the procedures for book sales? Would anyone taking over the group's leadership role be able to easily understand the group's standard operating practices? It is important to assess which organization accounts (email, social media, bank accounts, tax records, etc.) the outgoing leader has access to, who else may have access to these accounts, and how to transfer access to incoming leaders.

For the second step, **Documentation**, the ultimate goal is to have every procedure and all crucial information in writing so that a new leader can seamlessly follow up from where the previous leader left off. To that end, organization information needs to be in the Friends group's Google Drive as opposed to leaders' personal email accounts. That way, access is more easily transferred, and information can be passed along in real time. Chris uses an organizational document that he continually updates for future use, as various issues needing procedures arise. An example is Friends Board meetings procedures: when do the Friends meet (create an annual calendar); what needs to be done prior to each meeting; when to make the agenda; who is included in the distribution of the agenda; how do you access the Friends membership list to send a message to all members?

Using categorical labels or subfolders within the group's Gmail account to sort incoming messages are especially helpful (e.g., advocacy, book sales, calendar, Canva, finances, fundraising, general library information) as is having a list of members and "how to" procedures in a shared drive. For example, the Friends group secretary could have access to the shared drive, in order to send meeting-related emails to members.

Organizational accounts for Facebook and Canva might be in place, but various volunteers might need access/permissions to use these marketing resources. There can be administrators of the account, but other volunteers might have access for specific tasks. Hard copies of documents can be scanned and then filed within the shared drive folders (e.g., agendas, minutes by year). *Note that physical copies of the organization's legal documents (e.g., letter of determination for 501(c)(3) status from the IRS, incorporation papers, by-laws, Memorandum of Understanding, copies of 990 tax forms) should always be kept in a secure location at the library.*

For the third step, **Implementation**, it is important to identify potential successors and their specific duties, such as shared drive users and administrators of various accounts. It is essential to have a recovery account, through Gmail, in the event that access is lost. Chris stated that ideally a Friends member's personal email account should be avoided. If possible, a library staff member's account/contact information should be used in the event recovery is needed. Succession goes more smoothly when procedures are clearly written and documents are organized in a shared drive to which all who need access have the correct passwords, etc.

For the fourth step, **Transition**, it is very helpful to create a final checklist for succession. It is also essential to hold a final transition meeting, to include relevant stakeholders involved in the transition, including the library's director and the trustees. In Chris' experience, letting library trustees/board members know exactly what the roles of Friends officers/leaders are can make successor recruitment more successful. Chris said the President of Cortland's Board of Trustees come up with the idea of asking the trustees to each reach out to two community members to convey there were openings for Friends leaders. The trustees were well informed and had accurate information of what the duties of key Friends volunteers would entail.

Meeting participants asked Chris various questions. One question was how to find replacements for Friends leaders. Chris suggested tapping into highly dedicated Friends group members who don't want to see the group dissolve due to lack of leadership. In Cortland, the former Friends Treasurer became President. Another question was whether his Friends group had a member attend meetings of the library's Board of Trustees. They sent a different member of the Friends board each month, which helped build relationships with library board members, making transitions between Friends members assuming leadership roles easier. There also was a Trustee Liaison to the Friends who participated in Friends meetings. It is also helpful to have a close relationship with the library Director and key library staff.

Chris was asked what his highest priorities were in developing written documents, procedures, etc. He said his first focus had to do with legal and organizational aspects of the group, such as by-laws, taxes, signatories on bank accounts, fundraiser vendor accounts, etc. It is important to have a designated person check the Friends group email account on a regular basis so that communication from involved outside entities (vendors, banks, local community organizations, etc.) aren't accidentally ignored. It is helpful to always think about what your

successor might need to know and write that down as new procedures are implemented to address various situations. For example, if the President sends reminders about upcoming Friends board meetings, make a note of that on the transition statement (e.g., Google Mail has a scheduling function to send timed reminders).

Wilma Jozwiak, Friends of the Clifton Park – Halfmoon Public Library, shared that some Friends groups have chosen a co-president model, which is a less intimidating team approach. When developing the Friends strategic plan twelve years ago, FCPHL established four co-presidents all with very specific responsibilities for the organization because it was so challenging to find one person to be the president. Chris has found that using his four steps as a guide can make it less daunting for new leaders, as their role and responsibilities are clearly defined and established.

Chris is constantly updating the level of detail in his transition document on the group's Google Drive, including practical tips. For example, tips can include items that require coordination of several officers (i.e., Friends officers need to physically go to the bank where their accounts are to sign paperwork when financial roles are transferred). Another example of a tip to his successors was allotting enough time at book sales to pack up the sale before the library closes and how sale remainders have been distributed.

A participant, Wendy Hamilton from the Friends of the Ogdensburg Public Library, shared that they initially had a four-member board, but any member could attend meetings and vote. They eventually expanded their board to include four officers and three “at large” members who had key roles in the organization. Their group found that many members wanted to help the organization but didn't necessarily want to attend meetings. Therefore, being flexible in allowing members to volunteer on their own terms is helpful.

A question was raised on finding committee members outside of the Friends membership roster. Clifton Park had success using social media platforms, such as Next Door, to publicize their need for key volunteers. Another suggestion was to make the Friends President's role less onerous through delegating duties to other members, making the President's job more manageable and attractive for potential successors. Wilma Jozwiak shared that the Friends of the Clifton Park – Halfmoon Public Library sends a form to new members, letting them know which volunteer opportunities are available, to encourage them to become more involved. Their group goes out of their way to show appreciation and to recognize their dedicated volunteers. Do not discount the power of word-of-mouth marketing – tell everyone you need volunteers – plus recruitment posters in the library. Recruiting family members of Friends volunteers spreads the word as well.

Editorial note: See “Planning for Success: Friends of the Penfield Public Library” in *Friends News and Notes*, January 2023, pages 8 and 10, for an article on how the Penfield Friends utilized their library's community survey to raise awareness of the Friends, connecting with interested residents who stepped up to volunteer in co-leadership positions that helped resurrect the group with a viable succession plan. If you do not have the print copy of this issue, please request it with an email to FLS.NYLA@yahoo.com.

Another avenue is to create listings on VolunteerMatch. VolunteerMatch is a nonprofit network to connect volunteers with opportunities in their community and beyond, for both in-person and remote volunteer work. (<https://www.volunteermatch.org>). It has been around since 1998.

Volunteers search by zip code to find ways to volunteer within a 20-mile radius of their home. They can also screen volunteer opportunities by “cause” or interest area, if there many volunteer postings near their home. VolunteerMatch has a Basic service that is always free of charge to nonprofit charities that have 501(c)(3) status with the IRS.

Lisa concluded the meeting by talking about the FLS Daniel W. Casey Library Advocacy Award and the FLS Randall Enos Conference Scholarship. Nominations/applications need to be received by June 1. Additional information can be found on the FLS webpage, www.nyla.org/friends under “Our Awards and Scholarship” tab.

It is advantageous for Friends groups to join FLS. Lisa shared that the NYLA Annual Conference will take place in Syracuse this year from November 6-9. There are presentations focused solely on Friends groups. “Friends Day” will be Friday, November 8. Registration for the conference will open in August and all registrations are taken online.

FLS is always looking for ideas for future Connections meetings. Any suggestions as well as resources that groups have found helpful can be emailed to FLS at FLS.NYLA@yahoo.com.

Many, many thanks to Ann Poelma, President of the Friends of the Fairport Public Library, for these incredible notes of our gathering! Chris’s slides and a handout, an outline titled “Transition Notes Cortland 2023” that he developed for the Friends of the Cortland Free Library, are attached to these minutes.

We hope you’ll join us for our next FLS Connections! after Labor Day. Watch for a notice to register.

Lisa C. Wemett, FLS Coordinator for Professional Development
4/24/24

Christopher Lund was President of the Friends of the Cortland Free Library from January 2020 until November 2023. When he moved out of the area, he left this document with the key leaders of the Friends to document the location of information on the Friends and how communications could be handled with the Friends membership.

Friends Transition Notes

- Organizational Files
 - Older documents organized in several binders. Somebody will need to take possession of these binders.
 - Current files are all organized in friendscflib Google Drive. Access through username/password. Somebody will need to take possession of this account
 - Transition Note: Recovery Phone and Recovery email are currently linked to my personal phone/email. Will need to coordinate updating these with whoever is taking over.
- Gmail structure
 - All historical emails are categorized using Gmail "labels". Should mostly be self-explanatory
 - Best practice: Try to use the organizational email for all Friends related communications (this allows for easier transitions and for easier tracking of all records)
 - Email addresses of all current Friends members are saved in "Contacts" and labeled with "Friends of the Cortland Free Library" label.
 - To email blast all members at once, from the "Compose" window, click "To", then on the dropdown menu select "Friends of the Cortland Free Library", then check the box for "Select All", then "Insert".
- Meeting Procedures
 - Meetings historically have been the 4th Wednesday of each month at 6:30pm. Sometimes adjust for November (if conflicting with Thanksgiving). December meeting is generally held as a joining meeting with the Board of Trustees on the third Wednesday of that month.
 - Prior to meeting - Send out a meeting reminder a few days before. Address to "Friends of the Library" contact list, plus Library Director, President of the Board of Trustees, and Board Liaison to Friends (if any)
 - Agenda - Create in advance and print out copies for meetings. All prior agendas dating back to January, 2020 are saved in Google Drive in "Agenda" folder (broken out into subfolders by year)
 - Minutes - Secretary to take minutes. First item on each month's agenda should be reviewing and approving the previous month's minutes. All minutes dating back to March, 2017 are saved in "Meeting Minutes" folder in Google Drive (broken out into subfolders by year)
 - Tip: Suggest giving Secretary full access to Meeting Minutes Google Drive Folder - this will allow Secretary to add minutes directly into the Drive.

- After meeting - Send a brief recap of the meeting to the same list of recipients noted above in “Prior to meeting” email. Try to send it within a few days following the meeting
- Organizational Documents
 - Paper originals of all documents contained in Friends documents binder. Copies are included in “Organizational Documents” folder in Google Drive.
- Finances and Taxes
 - Funds held in two accounts with Community Federal Credit Union (Savings and Checking). The President and Treasurer are both signatories on bank accounts. Statements available online through MyCFCU website.
 - Transition Note: Removing my name as signatory and adding a new President’s name will likely require a trip to a local CFCU branch. Bank will likely require meeting minutes reflecting the election of a new President, with minutes signed by the Secretary. Treasurer may also need to approve with signature.
 - Transition Note: New President will need to set up an online account with CFCU in order to access online statements and info. This will likely need to be done in coordination with CFCU.
 - Each bank account has a corresponding Google Sheets document in Google Drive to track deposits and expenditures. Every deposit and every expenditure should be added on a separate line so that we can account for where all of our money goes. Current documents track back to April, 2022. There is no known detailed record of our income and expenses prior to this date other than what is captured in old statements and old meeting minutes.
 - We are required to file a 990-N “postcard” each year, due by May 15th. This is a relatively simple form that can be filed online with a few clicks. Instructions, along with copies of previous years’ forms, can be found in the Google Drive Folder “Finances → Tax Filings”.
 - Transition Note: We have an existing account with the IRS website that helps with filing the 990-N each year. Will need to transfer account info to whoever will take over this annual filing.
 - We can make purchases without paying sales tax by using our ST-119 tax exemption form. Originals are filed in Friends binder. Scanned versions are stored in Google Drive Folder “Finances → Sales Tax Exemption”
- Book Sales
 - Standard Book Sales occur twice per year - usually the first weekend in June and the first weekend in December. Setup is Thursday night. Sale runs Friday and Saturday. Breakdown is Saturday afternoon.
 - Prior book sale signage is saved in Google Drive “Book Sale” folder. Signage files are also available in Canva.
 - Transition Note: Need to transfer Canva log-in info (Currently Meghan and Kelsey have Canva access).
 - One option for disposal of leftovers is delivery to Ithaca for the Friends of the Tompkins County Book Sale. Note that you will need to call in advance so that

- they can be sure to have sufficient staff to take a large donation. But they will usually take most/all of our leftovers.
- Be sure to build enough time into setup and breakdown to be finished by the time the library closes - library staff should not be required to assist with setup/breakdown or to remain in the building after closing time.
 - Sale can be listed for free on www.booksale.org
 - Canva
 - Individual users must each be added to the account from the master admin account. Currently Kelsey and Meghan have access.
 - Transition Note: Need to pass along log-in info for master admin account.
 - Social Media
 - Facebook and Instagram linked to personal accounts. Kelsey currently has admin controls. Can add anybody else who would like access.
 - Dutch Mill Bulbs
 - Process is mostly automatic each season. Dutch Mill Bulbs will reach out at the beginning of each selling season to ask if we'd like to sell again. We just need to respond and tell them yes.
 - Brochures can be ordered for free on the Dutch Mill Bulbs website.
 - Transition Note: Need to pass along log-in info to Dutch Mills Bulbs account.
 - Little Free Libraries
 - Both libraries are managed through a single master LFL account. This can be used to update location information, post notes, and otherwise manage individual libraries. Additional/future libraries should be added using this account as well.
 - Transition Note: Need to pass along log-in info for master Little Free Libraries account.
 - StickerMule
 - Existing account is not a standalone account. It is connected to Google/gmail. To access the account, you will need to sign into Google account, then sign into StickerMule using Google.

Distributed by the Friends of Libraries Section, New York Library Association at FLS Connections, a virtual meet-up sponsored by FLS/NYLA on "Preparing Friends Organizations for Succession Planning." Tuesday, April 9, 2024.