Before Friends Become Frienemies

Presenters:

Lisa C. Wemett, Past President, Friends of Libraries Section of the New York Library Association

Melissa Tacke, Director, Castleton Public Library

Thursday, September 30, 2021
Lisa C. Wemett, MSLS

- Immediate Past President – FLS/NYLA
- FLS Coordinator for Professional Development
Melissa Tacke, MLS
Library Director,
Castleton Public Library
Upper Hudson Library System
A cautionary tale...
Our learning objectives:

We hope that you will be able to:

• Relate the **basics of conflict behavior and approaches to conflict resolution**

• Explain and utilize the outline of “**Working Together: Roles & Responsibilities Guidelines**” for discussion with the library administration, Board of Trustees, and Friends
...and that you’ll be able to:

- Formulate a **basic operating agreement** to manage operations smoothly and guide the arrangements for a constructive partnership
- Prepare a standardized **document to guide financial contributions** from the Friends to the library
Housekeeping and questions

Please put questions in the chat.
We will be addressing questions at the end of the presentation.
Friends are a valuable support system

- Goodwill
- Public awareness
- Advocacy
Hudson Valley Highsteppers

2019-20 cohort of NYLA’s Developing Leaders Program

“Conflict for the Conflict-Averse” developed by:
- Melissa Tacke, Castleton Public Library
- Kathy Reilly, Beekman Library in Hopewell Junction
- Kristy Lee, Sojourner Truth Library at SUNY New Paltz
Words associated with conflict:

- fighting
- struggle
- battle
- unpleasant
- nasty
- aggression
- defensive
- defeat
- confrontational
- bullying
- judgmental
- assertive
- conciliatory
- avoidance
- withdraw
- arguments
Conflict can lead to positive outcomes:

- create an opportunity to get things resolved
- lead to new ideas or lead to something better
- bring people closer together
- present opportunities for change
Thomas-Kilmann Conflict Mode Instrument

Approaches to Conflict

- Competing
  - Zero-sum orientation
  - Win/lose power struggle

- Collaborating
  - Expand range of possible options
  - Achieve win/win outcomes

- Compromising
  - Minimally acceptable to all
  - Relationships undamaged

- Avoiding
  - Withdraw from the situation
  - Maintain neutrality

- Accommodating
  - Accede to the other party
  - Maintain harmony

Assertiveness
Focus on my needs, desired outcomes and agenda

Cooperativeness
Focus on others’ needs and mutual relationships
Concern for Self versus Others

- **Me**
  - Assertiveness: Focus on my needs, desired outcomes and agenda

- **You**
  - Cooperativeness: Focus on others’ needs and mutual relationships
Thomas-Kilmann Conflict Mode Instrument

**Competing**
- Zero-sum orientation
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Friend + Enemy = Frienemy
It’s complicated!!
Reasons Conflict Occurs

✓ misunderstandings
✓ lack of information
✓ poor communication
✓ looking for a scapegoat
✓ a person is under pressure to “deal with” a situation
✓ complaining to others
Conflict is a slippery slope…

- Resentment can build
- Passive-aggressive behavior
- Low morale
- Work stagnates
- “Trickle down effect” begins
- Issues can escalate
Strategies to avoid conflicts

- Communication
- Clearly defined roles
- Memorandum of Understanding
- Guidelines for expenditures
“Too much information!” or “oversharing”?
Keep the information flowing

- Written reports
- E-mails, memos
- Minutes of meetings
- Regular, open discussions
- Trio of Liaisons
A Triangle of Ex Officio Liaisons for Communications

- **Friends Liaison to the Board of Trustees**
- **Staff Liaison to the Friends [Library Director or Staff Member]**
- **Trustee Liaison to the Friends**
Staff are Friendly Champions!
A Triangle of Ex Officio Liaisons for Communications

Friends Liaison to the Board of Trustees

Staff Liaison to the Friends [Library Director or Staff Member]

Trustee Liaison to the Friends
Clear lines of communication

“It is essential that all parties in this arrangement understand the responsibilities and the limits of their roles. **Frequent, clear, open communication about needs and expectations is the key to a successful partnership** between the Board, the director, and the Friends of the Library.”

*Handbook for Library Trustees of New York State*, p. 83
Relationships that Support the Library
<table>
<thead>
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<th>Trustees</th>
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<td><strong>General Administrative</strong></td>
<td>Direct responsibility for administration of the library within the framework of the board’s plan, policies, and budget. Reports at each board meeting and in other ways keeps the board informed of library’s progress and problems.</td>
<td>Recruit and employ a qualified library director; maintain an ongoing evaluation process for the director and board. Routinely keep in touch with what is going on through director’s reports, personal use of the library and feedback from the public.</td>
<td>Support quality library service in the community through fundraising, volunteerism, and serving as advocates for the library.</td>
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<td><strong>Policy</strong></td>
<td>Apprise board of need for new policies as well as policy revisions. Implement the policies of the library as adopted by the board.</td>
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<td>Coordinate and implement a strategic plan with library board, Friends, staff, and community.</td>
<td>Ensure that the library has a strategic plan with implementation and evaluation components.</td>
<td>Provide input into the library’s strategic plan and support its implementation.</td>
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<td><strong>Fiscal</strong></td>
<td>Prepare an annual budget for the library in consultation with the board, make the Friends aware of the special financial needs of the library. Decides on use of money on the basis of the approved budget.</td>
<td>Secure adequate funds to carry out library operations. Assist in the preparation and presentation of the annual budget. Authorize expenditures in accordance with the budget.</td>
<td>Conduct fund-raising to support the library’s mission and plans.</td>
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<td>Promote the mission of the library within the community. Educate the library board, Friends, and community regarding local, state, and federal issues that impact the library.</td>
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Recruit and employ a qualified library director; maintain an ongoing evaluation process for the director and board. Routinely keep in touch with what is going on through director’s reports, personal use of the library and feedback from the public.

Identify and adopt written policies to govern the internal and external operations of the library.

Ensure that the library has a strategic plan with implementation and evaluation components.

Secure adequate funds to carry out library operations. Assist in the preparation and presentation of the annual budget. Authorize expenditures in accordance with the budget.
Support quality library service in the community through fund-raising, volunteerism, and serving as advocates for the library.

Support the policies of the library as adopted by the library board.

Provide input into the library’s strategic plan and support its implementation.

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<td>organizations and make them aware of educational opportunities.</td>
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Community outreach
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• Who can provide information?
• What’s the background?
• Do we agree with the objectives?
I dream of a world where chickens can cross the road without having their motives questioned.
“Almost every major conflict between the library and the Friends includes some misunderstanding of each group’s respective roles, an overstepping of one’s role, and/or a perception that one group is overstepping their role.”

Teamwork
Best practices for communications:

• **Liaisons** to/from the Board of Trustees, the Friends of the Library, the library staff

• Provide **reports** (preferably written) at meetings

• Make **appointments** to discuss concerns **face-to-face**
Handouts to consult

• “Working Together: Roles & Responsibilities Guidelines”

• “Keepin’ It Friendly! Communications Tips for Library Staff, Trustees, and Friends of the Library”
A “pre-nup” for Friends, Board, Staff

Alpha Stock Images - http://alphastockimages.com/
Memorandum of Understanding

a.k.a.

Operating Agreement
A Memorandum of Understanding (MOU) is a **written** agreement that specifies the principles and **guidelines** under which the various parties seek to **clarify and formalize** their respective roles, responsibilities, and general arrangements for working together.
United for Libraries

The Association of Library Trustees,
Advocates, Friends and Foundations

www.ala.org/united

A division of the
American Library Association
As United for Libraries’ spokesperson, comedian Paula Poundstone helps raise awareness for Friends of the Library groups. Check out her PSAs and quotes about libraries.
What if....?
AGREEMENT
Help enrich your community by becoming a Friend of the Fairfax County Public Library!

Friends of the Library

HELP ENRICH YOUR COMMUNITY BY BECOMING A FRIEND OF THE FAIRFAX COUNTY PUBLIC LIBRARY!

Library branches of the Fairfax County Public Library are aided by their Friends group. These individual groups support, assist and promote library activities for the local community. Every Friends group makes valuable contributions to the entire library, as well as their own branch.

Friends activities vary depending on the needs of the individual community. Most Friends groups hold book sales, and the proceeds are donated back to the library to help the library acquire books and equipment as well as sponsor programs and exhibits beyond the library's operating budget. You can become actively involved or simply have the satisfaction of supporting a worthwhile cause. Consider donating your used books to the library for sale during Friends' book sales.

Friends Groups

Learn more about individual Friends groups on their web pages:
Purpose & Mission

**Purpose** = Why the group was founded

**Mission** = Describes methods and activities the group will use to achieve its goals
Purpose of the organization - Friends are organized to:

- Provide funding for “extras”
- Be a source of volunteers
- Increase community awareness
- Organize or sponsor programs
- Advocate for legislative support
Storage Wars
My way or the highway....

Did the books fill up the bays?!
Operating Agreement: Memorandum of Understanding

- Friends’ initiatives
- Purpose of fundraising
- Library will support Friends’ needs with …
- Friends’ responsibilities and roles in programming, advocacy, etc.
Definitely include:

- Name the parties in the agreement
- State that the Friends are an independent entity
- How the Friends will be included in the planning process
- A plan for communications through liaisons
- How funds will be distributed
- Friends will publicly support library policies
May include:

- Mission statements of both the library and the Friends
- The types of support the library will provide the Friends
- Assurance that the Friends will maintain their nonprofit status
Staff support

Accounts Clerk
Design of Membership Database
Circulation Desk Staff
Maintenance Staff
Signed by:
1. President of the Board of Trustees
2. Friends President/Chair
3. Library director
Review annually
New leaders? New director? New MOU!
Standard Operating Procedures

I think we could use an MOU!
Joint meeting of Library Board of Trustees and Friends Board
Friends of the Grosse Pointe (MI) Public Library
Memorandum of Collaboration

- Friends Liaison to the Board of Trustees
- Staff Liaison to the Friends [Library Director or Staff Member]
- Trustee Liaison to the Friends
Friends need to ask:

- What plans do you have?
- Current priorities (e.g., early childhood education, digital literacy, connectivity)?
- Volunteer support?
Friends Projects

• February – Membership drive
• April – Spring book sale
• August – Community-wide garage sale
• October – Fall book sale; National Friends of Libraries Week
How are the funds actually used?
Disbanding and Dissolution Language

The Friends agree that if they cease to actively fundraise and promote the Library, they will disband, allowing for a new Friends group to be established in the future.
Recruit anew!!
Please use this phrase instead:

…the officers will resign, allowing for new administrative volunteers to lead the organization, according to the group’s current by-laws.
Dissolution Statement in By-Laws

Article XI: Dissolution

In the event of a dissolution of the Friends, after paying or adequately providing for the debts and obligations of the organization, the remaining assets shall be distributed to the Anytown Public Library or, if at the time of dissolution, the Anytown Public Library is no longer in existence, then said assets shall be distributed to an organization exempt under Section 501(c)(3) of the Internal Revenue Code upon majority vote of the Executive Board members present at the last meeting of the Friends. Further, no member of the Friends shall be entitled to share in any assets upon dissolution of the organization.
Disagreements over finances
Guidelines for Expenditures of Funds
Friends are trustees of the money raised for a specific beneficiary, the library.

Not “the Friends’ money”
Extras! Extras!

Ad Hoc Committee on Friends’ Expenditures:
1. Friends President
2. Friends Treasurer
3. another active Friends Member
4. Staff Liaison to the Friends
“...that cannot be provided by the library’s annual operating budget”

• Look through the last 5 to 8 years of bills that were paid.
• What kinds of expenses have the Friends been covering?
• Make notes about the bills by category.
Examples of items to fund

• Equipment for public use
• Equipment that will enhance the library
• Collections or maintenance of collection
• Inventory of fundraising items
• Recognitions
• Lobbying activities
• Supplies for Friends’ projects
Friends generally would not fund:

- Lodging for a Friends officer
- Equipment or furniture for staff use
- Supply costs (office, craft supplies)
- Gifts for individual volunteers
End of summer party!
Who may ask, When, and Procedures

Who:
• Entire staff?
• Department heads?
• Wish list?
• Director?

When:
• Monthly?
• Quarterly?
• Annually?
Friends funding for “extras”

- underwriting special programs and performers
- purchasing furniture for public use or fixtures (like display units or signage)
- building renovations
- technology (mobile hotspots for loan)
Something unique!

Friends of Ethelbert B. Crawford Public Library
Literary Landmark™

A Chair for My Mother
by Vera Williams
What’s one ‘extra’ that your Friends group recently purchased for the library?
And the chat says....
Financial Accountability
Responsibilities of Treasurer and Deputy Treasurer
Shortsville woman charged after theft of over $12,000 from Wrestling League
Guidelines are not commandments!
Basics of Conflict Resolution

What could go wrong?!
Thomas-Kilmann Conflict Mode Instrument

Approaches to Conflict

Competing
- Zero-sum orientation
- Win/lose power struggle

Collaborating
- Expand range of possible options
- Achieve win/win outcomes

Compromising
- Minimally acceptable to all
- Relationships undamaged

Avoiding
- Withdraw from the situation
- Maintain neutrality

Accommodating
- Accede to the other party
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Assertiveness
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Friendly Scenarios: applying approaches to conflict
5 Approaches to Conflict

1. Competition
2. Collaboration
3. Compromise
4. Avoidance
5. Accommodation
Conflict Scenario #1

The Town Finance Officer states the purchases patrons make from the Friends ongoing book sale area should be rung into the cash register at the Circulation Desk with a separate key for these transactions, rather than collecting cash in a bank deposit pouch. The Friends Treasurer won’t receive a weekly accounting anymore.
No more weekly accounting

Approach to this conflict:

Competition

Discussion Starters:

• What do we need to do to make this acceptable to you?

• I know this will not be a popular decision, but we must…
Conflict Scenario #2

The Book Sale Committee members want to earmark the proceeds of the fall book sale as a donation to a local literacy charity for children in the community. The Staff Liaison to the Friends points out that the Friends’ purpose statement in their by-laws specifically says the Friends will raise money for the library.
Conflict with Friends’ purpose

Approach to this conflict: **Collaboration**

Discussion Starters:
- *What if we…?*
- *Let me suggest something different.*
Book sale remainders to charities

Win-win!
Conflict Scenario #3

The library has determined to save money and trees and create an electronic newsletter for patrons, rather than a printed piece which always included a page to promote the Friends and their activities. The Friends feel their members would rather have a print newsletter: “no one will read it in their e-mail.”
Change to electronic newsletter

Approach to this conflict: Compromise

Discussion Starters:

• Help me understand...
• What could we potentially gain from this change?
Conflict Scenario #4

A long-time member of the Friends left a significant gift to the Friends in his estate plan. The library’s Board of Trustees “knows” he wanted to make his gift to the library, to help renovate the library’s reading area. The Board’s President states the trustees should control these funds, not the Friends Steering Committee.
Control of generous gift

Approach to this conflict:

Avoidance

Discussion Starters:

• Can we revisit this issue at a later time?
• Can we solve this problem without confrontation that will damage our relationship?
Conflict Scenario #5

The Friends Board of Directors have discussed over several meetings whether or not to have a Lifetime membership in the Friends when they change the dues categories on their new membership brochure. Any membership fees are established by the Board each year and this new category won’t require a by-laws change. The group is deadlocked.
Adding Lifetime memberships

Approach to this conflict:
Accommodation

Discussion Starters:
• *What’s getting in the way here?*
• *Could we try this?*
Agreement versus Understanding

• “Here’s what we mutually understand.”
• “Here is how we said we would collaborate.”
Breaking a stalemate

Each party should:

• share their feelings, concerns, and needs about the issue
• offer a creative suggestion to move ahead
• state the action(s) it is prepared to take to create a better situation
We/They Syndrome

Remedies:
- Collaborative planning
- Clarifying expectations
- Open communications
- Risk-free evaluation
Keys to Resolving Conflict

• have clear priorities
• create more interactions
• commitment to shared goals
• role-reversal
• ongoing dialogue
Creating solutions for everyone
SUCCESS

STORY
The Great 2015 Book Sale
Community volunteers strengthen your library!
Relationships that Support the Library

- Director
- Board of Trustees
- Friends of the Library
How to contact our speakers

Melissa Tacke
director@castletonpubliclibrary.org

Lisa C. Wemett
FLS.NYLA@yahoo.com
We welcome questions anytime at
FLS.NYLA@yahoo.com

Learn more at:
www.nyla.org/friends


Contact FLS/NYLA at: [FLS.NYLA@yahoo.com](mailto:FLS.NYLA@yahoo.com)