



STLS

Southern Tier Library System

Connecting Community Libraries

Trustee Tuesday

The Compendium 2016 - 2018

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Trustee Tuesday was begun and continues to be written to aid trustees wherever they are in experience level to enrich their service to their library. As noted in the *Handbook for Library Trustees of New York State*, “The responsibilities of trustees are few in number but broad in scope.” To make the biennial Trustee Tuesday compendium useful, it has been organized according to these responsibilities. After each section heading, before the *Trustee Tuesday* posts, you will see the description of that responsibility as outlined in the *Handbook for Library Trustees*. If you see a document number after a highlighted (hyperlinked in the electronic version) word, this indicates it is attached at the end of the printed copy, for your reference.

Mission

Create and develop the mission of the library

Innovate > Iterate > Innovate > Iterate

Innovation in libraries is often seen as something new, difficult, technological, and expensive. We hear innovation within the story Silicon Valley has written for us - an iPhone X that many of us will never be able to afford, a driverless car that many of us would never consent to.

For the purposes of this reading, and for your work in libraries, discard that story of innovation, for the one I tell you here.

Innovation is changing the way something happens, in a way that is useful to the people who interact with that happening. But in no way does it require role changes.

For instance, I am a mother of two children, each very different than the other. My role for them is, and always will be, as their mamma - the person who will support and facilitate their development into functional, and hopefully independent and helpful, adults. Still, what feels like every day, I need to shift how I approach how I implement my role. Some of those activities were true innovations (getting my youngest to school without tears is a particularly excellent development).

Innovation is developing something that answers a previously unseen potential. Take this video from Kansas City Public Television about how local library systems are developing their entrepreneurship support services (click on the photo at right). The innovation is human.

And there will be a time when it no longer works the way we want it to, and our culture needs to be able to shift with that.

Enter iteration as a core organizational competency.

The Merriam-Webster definition that I hold in my head for iteration is this:

*a procedure in which repetition of a sequence of operations **yields results successively closer to a desired result***



For our libraries to be responsive to shifting needs and resources, we need to open all of our practices and procedures to iteration, to shifts, to innovation. That includes being open to innovations sprouting from directors, staff, trustees, and community members. The role of the library isn't diminished through the iterative re-creation of services; rather, it is strengthened.

Turning Outward Toward Your Community

Can you shout from the tabletops the highest hopes of your community members? Were you asked at the grocery store what your neighbors want for their future, would you be able to answer accurately?



[1](#) *The Obligation of Innovation talk from R. David Lankes*
- Long, but worth it

The 21st Century innovative library isn't innovative because it has the most iPads or virtual reality goggles - innovation is knowing and serving the true needs and hopes of your community with resources unique to your library. Innovation is the meeting of your strengths and the community's aspirations. In order to successfully match the library's strengths, the library's trustees, staff, and director have to know, in real terms, the aspirations of all the communities the library serves. Public knowledge, the information gained through listening to

your community about their aspirations, challenges, and solutions, is vital to planning and building library service.

Stronger Together

Collaboration is something we talk about in Libraryland a lot, but have you ever thought about it from a resources perspective? Year over year, the population in most of our counties has been in rapid decline ([Empire Center for Public Policy](#)). With constricting population, tax base, and industry many of our communities can't continue to support the ever expanding services they want, and in some cases, need from their libraries. In this environment, sustainability of our libraries and improved impacts for our communities demands that we look at resources in a new way.

Each of the communities we serve has resources that are unique to its residents, economy, and geography. The benefits of the library positioning itself as anchor within the community, and catalyzing the community's energy through collaboration and partnership are well documented. An example within our system of success through collaboration include the genesis of the Cohocton Public Library.

The [Purdue Center for Regional Economic Development](#) is a wealth of research on the economic benefits of partnership between municipalities, counties, and governments. It also includes resources on planning and developing strategic partnerships. Many of these resources aren't immediately actionable for you, but I hope you will explore them in the spirit of knowing that we are all in this together, and together we can forge the path toward sustainable rural communities.

Without coming to any events or workshops, a great way to start the work of strategic partnership building is by asset mapping your community. The Advancement Project with Healthy Cities, has developed my favorite toolkit on asset mapping. You can find it [here](#)



<http://www.communityscience.com/knowledge4equity/AssetMappingToolkit.pdf>). All methods of asset mapping begin by reflecting on the people and organizations that make up your community. Even doing this simple exercise can help you chart your partnership path.

The Southern Tier Library System will continue to work with our members to facilitate partnerships, and identify new pathways for resources sharing and growing. Together, we can help build sustainable communities across our region.

Plan

Regularly plan and evaluate the library's service program based on community needs

Vision - a prerequisite for doing

As I write this my cell phone is buzzing with budget vote day texts. Today I spent 8:30 am to 7:50 pm doing work related to revisions to the NYS Minimum Standards for public and association libraries. I have a vision for library service in our region, our state, and globally that is built in cooperation with the community, is sustainable, and feeds the people it serves our shared cultural heritage and legacy.

Tonight, the outcomes of the efforts and vision of dozens of library directors and trustees are being published, on Facebook, in the Wellsville Daily Reporter, and, apparently, on my cell phone. This isn't the newsletter with the vote breakdown, only a celebration of dedication. Not every STLS member library vote passed. For those that didn't, STLS will partner with the libraries and their community stakeholders to find the right path forward.

Having vision is the first, and most important step, in becoming. Committing to that vision in earnest is the work of the trustees and commitment can look risky. I applaud you have taken the risk in working with your supporters to put forward a budget referendum that supports the service suite the community needs. You who have worked with your community to develop a plan for your facility that meets the needs of all community members, regardless of their physical limitations and capabilities. You who have sought out library non-users and marginalized communities within their service area, asked, and listened to their aspirations.

I applaud each of you who trusted your vision of what life in your town could look like, and dedicated your efforts to that purpose. It is only in earnest and purposeful action that our communities are strong and stable enough to survive and bounce back from disruption. Thank you for taking risks, for persevering through failure, and for making my work worth it.

Planning for Action

What is the why behind what you do? How much money do you need to provide the services your community wants? In what ways does what the library does impact the community?



For many libraries, answering these questions is challenging without changing them. It is much easier to say how much money you have rather than how much the services you'd like to deliver will cost. It is much easier to say what you do in terms of circulation figures rather than impacts for community health and sustainability.

I submit to you that we can plan better, and in so doing, we can do better. If our plan is to start with community aspirations first, moving on to facilitating those aspirations through library services, and financing those services with our budget (and selecting a tax levy amount based on those services, not just a random number), then we can assess the value of library actions and services by community impacts.

The Southern Tier Library System will facilitate the strategic planning process with their member libraries. If you don't want to go that route, consider checking out <https://www.stls.org/strategic-planning> (Doc.s 1-4). The core of the process we follow with libraries is to be true to your mission, actively listen to your full service community, build on your unique strengths, and iterate often.

Resources from this section:

[Partner Power 101 from OF/BY/FOR ALL](#)

[Turning Outward Resources for Libraries](#)

[Strategic Priorities Example Document](#)

Hire

Select, hire and regularly evaluate a qualified library director

Hire a Qualified Director

Your director is leaving? Your director has left? Disruption is not easy for any organization, and unexpected disruption in leadership can set a library's program back months or years. As a board, even when you love the director in place, you should be able to answer the following questions without using the current director's name:

- Why do you love your library?
- What are your most successful services?
- What are your most impactful services?
- How are those services implemented?
- What is the library's strategic vision for improving services and filling gaps?

The answers to those questions will inform three documents that will help you in the recruitment and hiring of a new director: Job Announcement, Position Description, and Employment Contract.

Job Announcement

The Job Announcement is the blurb that goes in *The PennySaver* or the *Shopper*. The tone of the Announcement should be positive. It should describe what is excellent about the library and the community it serves. In one sentence, you should tell the reader the dispositions you are seeking in the leader of your organization.



For libraries that can't pay the incoming director a salary that is "commensurate with experience" or "competitive", it is also helpful to state the number of hours (or range) and hourly wage rate in the Announcement, as well as the Description. Let applicants know what the preferred submission date is. Don't forget to include an email for candidates to write to with questions and to send their cover letter, resume, and references to!

Include a link to the full Position Description. For ads that charge for space, use a link shortener like <http://ow.ly/url/shorten-url>, <https://bitly.com/>, or <https://tinyurl.com/>.

Send your Announcement, linking to the Position Description (or just both documents), to STLS for posting on our Job Opportunities board. We'll ask if you would like it sent to SCRLC, WNYLRC, or RRLC (depending on your location) for inclusion on their job sites. (When the position is filled, ask us to remove your Announcement.)

Position Description

Many libraries ask me for a Library Director Position Description when they are faced with the recruitment process. I send them this: [Sample Position Description \(Doc. 5\)](#). It has all the elements you need, but it also has some real problems because it isn't specific to the institution. If you know the hours you need the Director to work, include them (instead of "flexible hours").

If you took the time to answer the questions above, use the service answers to develop the job duties. Also, don't sugar coat the job. If the Director has to do something that is not typical Director work and not a core service, include it (eg. routine maintenance of grounds, including de-icing sidewalks and leaf blowing).

You have the opportunity, right now, to shift or change the actions the Director takes to implement the library's mission. Reread and edit both the Announcement and the Description for alignment with the mission and vision of the library.

Employment Contract

We'll get into this in Part Two: Interview, Hire, and Record Keeping. In case you like to jump ahead, here is the sample we typically send: [Sample Director Contract \(Doc. 6\)](#).

Next Steps

Don't hire anyone yet! In the position announcement you gave a preferred submission date. While I recommend keeping an eye on how many applications you are receiving and increasing your advertising effort if you aren't getting any, I urge you not to read the application packets until the preferred date has passed.

The rural library candidate pool is not deep, but if we consistently market the vision of our libraries when seeking leadership for our organizations, our chances of finding the right leader are improved.

Assess, Interview, Offer

You call a candidate and invite them to an interview. Every contact you make with that candidate, is an opportunity for both of you to gauge if this relationship is going to work. Every candidate is



interviewing your library as well, and how you do will lay the foundation for long term retention, or sudden and disruptive attrition.

Assess the Applicants

Match them to the requirements of the job. Sort into Not Qualified, Qualified, and Qualified & Preferred. Use the contents of the resume and the cover letter to determine if this person's experience demonstrates qualification. Do not put people into a Not Qualified pile because they live in a different town, have a certain name, or have a minor typographical error. Base this assessment on demonstrated qualifications only.

Phone or In-Person Interview

Have a lot of people in the Qualified and Qualified & Preferred piles? Hooray! What a delightful problem to have! This can happen often if you use an online job board like Indeed, or TwinTiersHelpWanted. As a board write questions that will help determine whether this person is actually qualified for the position and actually understands the nature of the work. One person calls everyone from the pile and takes notes. This is also an opportunity to make dates for in person interviews.

Human Rights Law prohibits the asking of certain questions. We recommend that after you've drafted questions relevant to the work and vision of the library, you check to make sure you haven't asked for any personal information that might not only be erroneous, but possibly illegal. [See Human Rights Law guidance for employers \(https://www.labor.ny.gov/careerservices/ace/employers.shtml\)](https://www.labor.ny.gov/careerservices/ace/employers.shtml).

Also, the Society for Human Resource Management publishes excellent guidance for compliance with federal guidelines. <https://www.shrm.org/resourcesandtools/tools-and-samples/interview-questions/pages/default.aspx>

Your in-person interview panel should be conducted by more than one person from the board, and can include one or more legacy staff members. All interview panel members should have the list of questions before hand and the same questions should be asked of each candidate. After each interview, notes on the candidates should be collected for retention.

Make the Hire & Decline

Make an offer before declining your runner up candidates. If no candidate is qualified, it is better to consider it a failed search and reopen than to hire the wrong person.

In the case of a director, the contract can act as the offer letter, but only if it explicitly states the wage, hour, and benefits conditions of employment. ([See NYS Labor Law Notification Requirements](#).) Here is a [Sample Director Contract](#). Consider it a loose guideline of what can go in a contract, but not a legal opinion about what must go in the contract.

Concerned about the wage you are offering? To benchmark director wages within the Southern Tier Library System region, use the published Annual Statistical Report. Remember that the word salary has specific legal meaning. If you aren't compensating your Director at an annual rate according to the

Year	Annual Salary
2018	\$40,560
2019	\$43,264
2020	\$46,020
2021	\$48,750



following table, STLS strongly recommends you describe the conditions of employment based on hourly rate and expectation of hours worked per week, understanding that when the director works more than 40 hours per week, the library must compensate at the overtime rate 1.5 times the regular rate.

Remember: any hour a “non-exempt” employee works within a work week must be compensated within one pay period. If you aren’t paying your employee at least the amounts in the table at right (from [NYS Overtime Exemption FAQ Doc. 7](#)) according to the time schedule, they are protected by the Fair Labor Standards Act and have to be paid in real money (not “comp time”) for every single hour they worked. Normally scheduled to work 32 hours, but worked 35 that week? They don’t get 3 hours to use next month, they get additional pay in their pay check.

Next Steps

Onboarding, or the process by which you acculturate your new hire to the organization, will show that your new director can trust the stability of the library. Conversely, a disorganized onboarding can make new hires feel left in the cold. It all begins with the offer letter and contract process. We'll get into the details of the full onboarding process in our next installment.

Onboarding the Qualified Director

You have found the new leader of the library. The Chief Executive Officer who will implement the mission and vision of the library organization through their operational practices. Or at least, we all hope they will. The most impactful thing you can do as the collective supervisory body over this new leader, is to support them with clear expectations. We cannot be successful if we don't have the same vision of success.

Welcome!

The director should receive a tour of the facility on their first day from either the board president or the staff person in charge of doing their operational training. Within the first week the director should be introduced to all trustees, all staff, the primary contact for the Friends group, and all principle/weekly volunteers.

Schedule staff overlap for all director hours for at least two weeks, allowing the new director to meet with each staff person off the circulation desk, meet with key people in the community, and to have ample opportunity to ask questions.

During the first welcoming day, the director should receive a schedule for both themselves, their staff, and library programming for the first month. This will allow the new leader to manage their time and expectations.

If the previous director left with projects left incomplete, include project deadlines and target dates in the schedule. No one like to feel that in their first week of work they have already fallen behind. Giving a schedule in the beginning hands the power over that time back to the director.

Policies & Procedures

Policies give the director a road map to follow. In many of our libraries, directors are hired without any previous library experience. There are some practices and policies that are very library specific and



should be given to the director on the first day with a scheduled date to discuss them within the first two weeks on the job. This will help the director understand the board's priorities, and to feel secure that their actions are legally supported.

Part of having this information, is also having immediate access to all the information library decision makers need access to, including the budget, the vendor lists, and past meeting minutes. Many boards don't want to overwhelm the new director with all the information in the beginning. It is better to give access to all the operational information at the outset and leave it to the director to determine their pace, than to restrict information they may need.

Training Opportunities

Professionals need a place of professionalism. The Southern Tier Library System can help reinforce the importance of training and professionalism for you, within our consultant visits. Within the schedule given to your new director in their onboarding packet, make time for professional training. If that isn't part of current practice, include explicit guidance on attending training opportunities within the system and online, how the time is compensated and how mileage is (or is not) reimbursed.

Repetition

Directing a public library isn't easy. If you are in a mid-size or larger library, time is consumed with finding balance with legacy staff, diverse library stakeholders, volunteers, friends, and balancing budgets. In a small library, it is learning the full suite of activities that must be proficiently accomplished during every open hour of the library, so that one can accomplish them without support, from patron registration to running reports for the board to downloading ebooks for patrons with diverse devices.

Show your understanding and support for your new hire by checking in daily, then weekly, then monthly, as the director becomes more competent and confident.

The work of onboarding your new director sounds labor intensive, but laying a strong foundation and building solid relationships at the outset will help everyone in the library be successful.

Evaluating the Qualified Director

Evaluating the performance of your director can be either disastrous or positively impactful for the library. We'll cover some practices that can help make the process meaningful and helpful to the sustainability of the library program.

To start, your library would ideally have either or both a long range plan and a strategic plan in place that will inform the goals you set for your new director (or the goals you set in partnership with your not-new director). Contact me if you want help with the planning process, but at its most basic, use these questions from the trustee handbook to develop goals for the upcoming year:

- What does the community need?
- What is to be done?
- Who is responsible and who should be involved?
- How will it be done?
- What is the timetable?



The evaluation measures for your director would then be tied to if what needed to be done happened, if so, what were the outcomes, if not, were the responsible parties properly supported, etc.

Check out the *United For Libraries* "Tips for Trustees" on evaluation. This brief document has both sample evaluation documents and overall guidelines for the evaluation process: [Short Takes 8](#) (.pdf). If you entered into a contract with your new director during the hiring process, your probationary goals, and maybe your first year's measures, have already been outlined.

Know your role

The board is to govern the institution, the director is to lead the operations. When evaluating the work of the director, you can include appraisals of their ability to lead staff, but don't do evaluations of staff directly.

Clear expectations & continuous evaluation

The contract should clearly define the job. The board should communicate clear goals based on the mission and vision to the director. The board should set the expectation that these goals form the structure of the Director's report monthly to the board. This sets up a system of reflection and self-evaluation for the director that can be useful to both groups.

The board should ask supportive and meaningful questions at the end of each Director's report in the board meeting.

Remember, evaluation and assessment should be a part of your ongoing relationship with your director and your director's relationship with the staff. No expectation should be a surprise given at the annual evaluation. No dissatisfaction or appreciation should wait a year to be expressed. And in both cases, no one board member's opinion holds more weight than the views of the full board as a collective body.

Ending probation & setting the stage

"Train people well enough so they can leave, treat them well enough so they don't want to." -

Richard Branson, Founder Virgin Group

Trust the professionalism of your director and treat them as the CEO of the library from day one. Be supportive, encouraging, and engaged. After six months in the position have an honest conversation in executive session with the full board about the performance of the director and the board's behavior in supporting the director.

Is your director the one? Give a small raise at the end of probation and discuss the upcoming year. How will the board and director work together to ensure the successful implementation of their vision?

As a board, budget to give a raise at the end of each evaluation based on an objective measure (equal to the percentage increase in funding? equal to a percentage up to a cap of grant funding brought in?) Align it with a goal that the board has prioritized to incentivize desirable performance.

Remember that support of your director should include ample time to attend training experiences, and administrative time (off the circulation or reference desks) to apply what they've learned to operations.



Repetition

Check in daily, then weekly, then monthly. Be clear, honest, forthright, and supportive. Noses in, fingers out.

Ending the relationship: the unqualified director

If you are able to hire a qualified director, you should never have to do this. In the event that after supportive intervention and multiple evaluations, the performance of the Director by all objective measures is negatively impacting the library, you are duty bound to act.

Call us for context specific guidance on this topic.

I wrote this mini-series to help you develop a purposeful relationship with the Director as a role within the library. You need to be equally purposeful in the evaluation of that individual within that role, and the communication around that evaluation. It can feel difficult, but we're here to help.

I encourage you to explore board self-evaluation as well. If we believe that great libraries are built by both directors and trustees (and the staff, friends, and volunteers they lead), then evaluating board performance is imperative. This evaluation is from the HATS team: [Board Evaluation](#) Doc 8(.pdf).

This week's doozy! No "Comp Time" for Non-Exempt Directors (and if you pay less than \$43,264, they are non-exempt)

We have been recommending to association library boards that they transition away from compensating their directors who work more than their standard work week (for example 35 hours) with "comp time", and instead pay the hourly rate for every hour the director, or other employee works. Not every board, or director, likes the idea of the hourly rate. We reached out to a lawyer for guidance on the issue. You can read it in full [here Doc. 9](#), and I'll describe in more depth in next month's issue on budgeting. For now, just know that when budgeting for salaries next year, think in terms of total worked hours, not a fixed salary.

Minimum Wage Law Who must comply: Association, School District, Special Legislative District Public

Every person employed by the library must have been making \$10.40 this past year (2018) and you must increase their wage to \$11.10 per hour on December 31 (increased to \$11.80 for 2020, and \$12.50 for 2121, always effective December 31st of the previous year). If they are considered Salaried, Exempt they must be making at least \$43,264 as of December 31, 2018.

If they are considered Salaried, Non-exempt, it has been consistently our understanding, and we see only support, not contradiction in the law, that the hours earned between the standard work week and 40 hours must be paid, with cash.

We rarely share our most valuable resource - our staff

Around the nation people are talking about the "sharing economy". Libraries aren't just talking about it, they're doing it. Public libraries translate a small collective tax contribution into valuable resources to be shared among all community members. Libraries share their collections readily with other libraries system wide because it enhances access for all of our patrons.



There are services that many of our libraries wish to provide to their communities, but don't feel like they can justify the expense of hiring the right expert for the job. I hear this the most where **digital literacy programming and local IT support** is concerned. Libraries know that to get a highly skilled person, they need to pay a competitive wage with full time hours, but what their library needs is maybe one day a week of work from a person with those skills.

Many of our libraries are within 15 miles of each other. Some are as little as 4 miles down the road. Staff sharing and coordination around specific skill sets for these regional clusters the most sensible move to provide quality service at a reduced local cost.

In all partnerships between the library and another organization, internally, or with a Friends, Club, or Foundation, we recommend drafting a memorandum of understanding (MOU) - or a document which outlines the parameters of the relationship and the roles and expectations of each party - **before** you need one. If a situation does arise where you feel like you need one and it doesn't exist, positive negotiation in those contexts is much much harder.



All MOUs should answer common questions:

- Who exactly is included in, and expected to comply with, this agreement?
- What are their responsibilities - financial, staffing, work outcomes?
- What benefits should they expect to gain from this agreement?
- When in the future is the agreement to be reviewed for relevance?
- How can the parties handle disputes related to the agreement?
- How can the parties dissolve the agreement?

Remember, an MOU is agreed upon not because parties can't trust each other. Rather, it is formed so that every organization or person involved has clarity and guidance on what to expect and can plan on it. This clarity often counters disputes before they even begin, strengthening partnerships and trust over time.

Successes & Lessons Learned

When sharing staff, how do both boards feel like they are getting their fair share of the attention?

- Get it in writing
- Split on-location time & development time separately
- Publish and share location schedule at least bi-weekly
- One library does the payroll and invoices the other library for their portion of the cost
- Code timesheet time so each library has clarity on work

As libraries have shared their experiences of shared staff and directors, the biggest challenges come from accounting for non-location specific time: preparation for programs, grant writing, and professional development. By structuring staff time reporting so that time spent in each activity is visible and divided equitably, relationships can remain positive and all communities are served.



Here is [a sample MOU from a shared director position in Word format Doc. 10](#). Once downloaded, enable editing and look at the comments. These comments offer suggestions for editing the document for other shared positions.

Paid Family Leave is Here

This week each of your libraries will receive printed guidance on Paid Family Leave and Disability Benefits Law. While only association libraries and reading centers (who employ at least one person, including the manager) are required to comply with these laws, it is my hope that all library people will take time to learn something about the benefits and consider whether opting in is appropriate for their institution.

The benefits of the Paid Family Leave Program will be implemented and increased over the next four years.

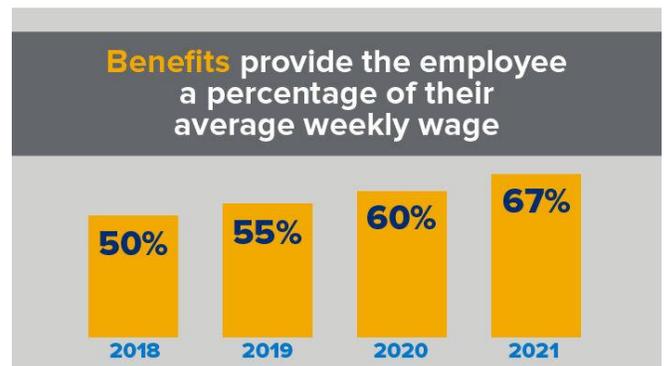


Because the cost for employees is based on a percentage of the average New Yorker's salary, which has been overall stable for the past many years, cost to the employee is projected to remain stable around \$1.65 per week, or \$3.30 per bi-weekly paycheck. The phasing in for the compensation while out of work to care for family will also phase in until it is even with New York's Disability Benefits Law (DBL) benefit. Also known as Short-Term Disability, if you are an

association library or reading center, you also are subject to DBL.

For those of you familiar with the Family Medical Leave Act (FMLA), there are some similarities between NY's Paid Family Leave and the federal FMLA. The biggest differences are that Paid Family Leave time is:

- Compensated at a percentage of the employee's average wage up to a cap.
- Allowed to be taken consecutively with DBL/Short-Term Disability (for example, if an employee gives birth today, depending on physician's recommendations, she can take at least six weeks off and be compensated up to 67% of her wage by DBL. After those six weeks, on January 1, 2018 she can take an additional 8 weeks off and be compensated at 50% of her wage to care for that same child).
- Coverage for care to an expanded circle of family, including:
 - Spouse or domestic partner
 - Child (no age limit) for medical and/or bonding
 - Parent or parent-in-law
 - Grandparent



- Grandchild

The similarity in those two programs, and where Paid Family Leave differs from DBL, is the increments in which the benefit can be taken. In this program, the benefit can be taken in one day increments for a long term care issue, but not for a one time occurrence. For example, the employee could take off periodic days to take his partner for dialysis, not to exceed a cumulative 8 weeks over the course of 2018, and be compensated for each of those days at a rate of 50%, but not to take his partner for a doctor's appointment.

Partners working for different employers can take the benefit to care for the same person for the full amount of time.

Required to offer this benefit to employees or interested in opting into the program? Your first step is to contact your insurance broker or company. They will receive the payroll deductions and manage eligibility determinations for your employees. No board will have to figure out if the absence qualifies. Instead, the employee will make the claim directly to the insurance company who will manage compensation for the missing time.

This program is designed to be fully employee funded through payroll deductions and not to increase the HR management burden on employers. We hope that as libraries get closer to 2018, they will see Paid Family Leave as a low to no cost benefit offered to a work force that has performed one of civilization's most prized tasks without adequate compensation or necessary benefits for more than a century in most of our communities.

Resources on Paid Family Leave

[Fact Sheet for Employees from NYS \(.pdf\)](#)

[Fact Sheet for Employers from NYS \(.pdf\)](#)

[Paid Family Leave Program Website](#)

Trustee Tuesday: *Sexual Harassment Prevention and more*

We sometimes fall into the trap of dismissing new regulation as another unfunded mandate serving only the gods of bureaucracy. While not a wholly inaccurate view, it can lead us to miss the opportunities the law opens to us. However, if we act on the spirit of the law in the development of local conversations, policies, and practices, we build healthier, more sustainable libraries.

In this issue, we'll cover the opportunities for more intentional practices and policies that the Combating Sexual Harassment legislation opened to us. At the end I'll note a short list of potentially impactful regulatory changes from the past four years and some currently in the works - as well as a little guidance on how to approach them.

By now, you've received [Executive Director Brian Hildreth's brief](#) on what the *Combating Sexual Harassment in the Workplace* law means for you, as well as the ways in which STLS will support our membership in their path to both compliance and development. What follows are the opportunities we recommend libraries explore when drafting their own policies and procedures.



1. **Who can be impacted by sexual harassment in the library?** Think through processes for your patrons, volunteers, work placement employees, interns, staff, and trustees. Do you include being alone with a patron watching pornography sexual harassment? There is probably more than one policy we should talk about / consider amending. Consider the case of Hennepin County Librarians [who sued](#) their library system and won stronger filters and an apology, under hostile workplace statutes.
2. **Who will each of these people go to and how?** What is their second option if the first is closed due to circumstance or behavior?
3. **What is the impact on each member of the library organization and community when harassment goes unchecked?** Here is the greatest opportunity for dialogue this law pushes us to have. Your staff are often in the building alone. If you are not familiar with how commonplace patron sexual harassment of library staff is, I encourage you to do a quick search, or ask your staff. Warning! Take this as an opportunity for **truth** and reconciliation, not to seek confirmation from your staff that they've never experienced harassment. As a reminder, while NY's workplace policy and training laws are new, sexual harassment has been illegal in the workplace for many decades. [Read ALA guidance on this here.](#) Further remember that as a trustee, you are the employer. Look at your behavior through this lens when approaching your Director or library staff on this topic.
4. **Every person who works in or for the library must receive the policy and must receive sexual harassment prevention training.** We reached out for legal guidance on the necessity of training library board members. The [guidance Doc. 11](#) we received is worth a read by all libraries, and includes that yes, **trustees must undergo the training** because they are the employers. Here is another area where you might be tempted to miss the opportunity this affords you. Consider that if you are all in the same room, talking through the implications of harassment, how you are preventing it through your policy, and what practices you will commit to, that could be a powerful boon to your library and its capacity to handle what is, at this time, inevitable.

Library BILL of RIGHTS

When you choose to develop your local common sense policy, remember you'll need to check the finished product against two documents: [NYS Minimum Standards for Sexual Harassment Prevention Policies](#) and the [ALA Library Bill of Rights Doc. 12](#). For additional resources, see All On Board, the presentation Stephanie A. Adams gave at STLS in December 2018.

New York State

Visit the Combating Sexual Harassment in the Workplace [website](#). There are FAQ galore, policy and form templates, and the full state designed training module. Remember that you don't need to use the templates or the module, as long as what you use locally (or attend at STLS) satisfies the minimum standards (also listed on the website).

Remember that the implementation of this law is going through the [Division of Human Rights](#), and its federal foundations lay in the [Civil Rights Act of 1964](#). Sexual Harassment is toxic for the workplace, but it is also classed as discrimination in federal statutes.



American Library Association

ALA has a [long list of resources](#) dealing with harassment in general and sexual harassment in particular. Entitlement behaviors put libraries at risk nationwide, from the leering patron, to the dangerous employee interaction. Our actions must be clearly pro-active and our preventative measures leave no room for misunderstanding.

Also, check out [this new quick article](#) from Stephen Albrecht (the library security guy we had at STLS last year at this time) for *American Libraries* magazine not directly addressing sexual harassment, but general safety and security concerns.

Fund

Secure adequate funding for the library's service program

Your Library's Budget is Your Library's Priorities Document

Those who know me know that I love planning and plans that are tied to actions. The first time I met with a board to talk through my strategic planning process and offer consultation services, a trustee asked me, "What's the point?"

It is possible, if you are a planner, a list maker, an arranger - to fall in love with the process of planning in its own right. Yes, the plan is the road map and we talk about action items. But, the plan's success and implementation are determined by something other than how well-crafted your SMART (specific, measurable, achievable, relevant, time-bound) goals are. Your plan and the strength of you library's priorities, are shown in you budget.

In Roger Shonfeld's post "[Shaping a Library by Linking Planning and Budgeting](#)" he reports on how thinking about both planning and budgeting in libraries has shifted. One of my favorite quotes he pulls from libraryland is "a library's values are visible in the budget". This isn't about re-framing budgeting in a narrative way, it's about understanding that we have choices in what we do and how we allocate resources. Including staff time. And that in order to explore budgeting for our priorities, we need to understand all the resources at work within our library and how we spend them.

Shonfeld gets into a lot of labor intensive practices for answering those questions within a library institution. I don't recommend them. What I do recommend is that we start the process of exploration to find out the truth of what we do and what it costs, so that we can make informed choices when we sit down at the budget table.

The Money is Your Responsibility

At STLS we sometimes talk about holding workshops seasonally, as public libraries annual rhythms that they move through. Now is budget season, which leads to referendum planning and tax cap compliance filing. One step at a time though!

The Budget

Your library's budget is the document where the partnership between the board and the director is the most evident. Here is the suite of services the director wants to provide through the library's operations and facility. Here is the commitment of funding from the board to see those services implemented. Too often small non-profits, including libraries, budget income side first, trying to spend



the least amount of money. Or they spend on fixed expenses only and don't budget for the services that we associate most closely with libraries: collection development and programming.

Brian and I both do consulting for individual libraries on the budgeting process and would be happy to assist. You can also join us for the **Service Based Budget** workshop immediately following the Directors' Advisory Council meeting, Wednesday, September 27th at 10:30 am in the Montour Falls Memorial Library, in beautiful Montour Falls.

Or, you can check out some books from the STLS Consultants' Collection, like [Managing Budgets & Finances](#) by Hallam and Dalston or [Beyond Book Sales](#) by Dowd.

The Vote

Almost all member libraries of STLS are funded, at least in part, through a public vote. When you budget service expense first, it helps you determine what the cost of operating your library really is - and what increase in funding you need from your community to pay for that operation. Any funding you receive from your community should be spent transparently, and to do that, you need to be able to describe where the money is needed and why. Budget first, determine need, ask if your community will support funding that service - all in the light of a democratic and transparent institution.

Tax Cap Compliance

The question the Tax Cap Compliance form is most interested in asking is how much will you ask for from the tax payer, and what is the percentage increase that amounts to. The super majority needed to override the tax cap is on your board (60% of trustees must vote to override the tax cap in order for the library to put a greater than tax cap increase on the ballot), not of your voting public.

Unfortunately, no one at STLS has access to the back-end of the Tax Cap Compliance form portal - that is all operated through the Office of the State Comptroller. For assistance with your log in or password, only they can help you. For specific assistance on how to fill out the form, please don't hesitate to reach out to Brian or myself.

Get the Grant! with Eli Guinnee

As often as possible, I'm offering workshops multiple times in different locations around the system. Eli was gracious enough to perform this in both Belfast (on a Saturday!) and Bath. The big take away is that any grant is achievable if you remember a few basics: call ahead, follow ALL the directions, re-read for clear alignment with the purpose of the grant. Like all Eli Guinnee workshops, it was hands-on and practical. I've included all the tools he used below.

[Get the Grant! workshop presentation](#)

[Allegany County Area Foundation Grant Application](#)

[Case Study 1](#)

[Case Study 2](#)



Steward

Exercise fiduciary responsibility for the use of public and private funds

A primary way libraries prove that they are exercising fiduciary responsibility is through the various reports they are legally bound to produce.

Reporting

Setting yourself up for reporting on the previous year will make the looming deadlines less terrifying, and the headaches less severe.

Annual Report to the State - Revenue & Disbursement Categories

Every year, every public library in New York state has to provide financial information to the Division of Library Development (DLD) and the State Library through an annual reporting portal. And every year, the most challenging part for our libraries is filling out the revenue and disbursements sections. In order to aid your path, [here are all the financial section](#) instructions you can share with your bookkeeper or accountant. We hope that you will ask for an annual report from that person that aligns with these income and expense categories, for easier translation of your financial picture to the state.

Annual Report Questions You Asked (remember I'm a librarian, not an accountant or a lawyer)

Are our By-Laws and our Charter the same thing?

While they should have the same message, they are different documents, with different roles and processes attached.

- By-laws - This document is developed by the library Board of Trustees and describes the mission, make-up, and rules of library governance including number of trustees, term lengths, definition of quorum, and frequency of meetings.
- Charter - This document is approved by the NYS Board of Regents and is based on the by-laws of your library at the time your library became a chartered library.

As the library organization changes and by-laws are amended, those changes need to be filed with the NYS ED Division of Library Development or they don't become a part of the Charter. In this way, many libraries with long standing Charters of Incorporation have practices outlined in the charter that don't match current by-laws and/or board practice.

We have an association library - what rules actually apply to us?

Laws you HAVE to follow are:

- Non-Profit Revitalization Act 2013
 - Conflict of Interest policy with trustees and directors filling out and signing a Disclosure of Interest form annually
- All state and federal labor laws
 - FLSA - even though the federal salary threshold didn't change, the law has been in effect since 2002. In NYS that means that if an employee has a salaried exempt wage status they must be paid at least \$37,830, \$727.50 per week. As of December 2017, that will increase to \$40,560, \$780 per week.



- Workers Compensation, Short-Term Disability, Unemployment insurances - while you are only required to hold the first two under the law, the third is a safe guard for the eventuality of paying unemployment insurance.
- Employees, including directors, must be paid for the hours they attend training, board meetings, and special events. No employee of the library may volunteer at the library.

What are the differences between local public funding, public funding vote, and a contract for service?

- Local public funding - The funds you receive from any local tax funded government or district (town, village, school district)
- Public funding vote - Typically referred to as a 259 or a 414, these are funds that are presented to the voters of the district (municipality or school) and any increase in funds require a majority approval rate of voters to pass

Contract for service - Let's say your library is located in Margosville in the Elitown Central School District. You're funded by a little pot of money from the Margosville town board and a tax on the residents of Elitown CSD through a 259 referendum. Neighboring Loriesburg has no library, isn't in Elitown CSD and Margosville is the nearest place folks from Loriesburg can go for dynamite programming, an expertly managed collection, and a continuously positive and friendly environment. The Margosville Library board might approach the town of Loriesburg to enter into a contract for service where in Loriesburg pitches in some money and Margosville agrees to have an outreach program once a month located in Loriesburg. Complicated? Yep. Not often a thing done? Correct.

IRS Form 990

Quick guidance on your form 990 is available through the [IRS](#). Many of our libraries either have their bookkeeper file the form for them, or are only required to file the "postcard", which they do themselves. Consider the 990 your Charity Facebook Profile - this is where you make known to the world of foundations, endowments, and givers, that you take your finances seriously and use your money to do good work.

Annual Report to the Community

For many libraries, this takes the form of an annual appeal letter that includes some highlights from the year. Consider beefing it up to show the true impacts of your community's investment in their library - even if they aren't donating to your annual campaign, they are paying the operating expenses of the library through their vote!

Trends & Continuing Education

Trustee Education Regulation

There now sits with the State Library a new Trustee Education Regulation for the Commissioner of Education to examine and pass. If you haven't already received a link to a brief survey from your director, you will soon, so that you can add your view on the regulation which states that every trustee serving on a library board (all library types) will **attend three hours of training annually**. For those familiar with the school board member law, this regulation requires less than half the hours, but continual, over the full tenure of the trustee. Further, you don't need to sit through repeats, and consultation from Southern Tier Library System staff on board business, count.



We are professionals.

Dearest trustees, last week I had the privilege of meeting board members that I had yet to encounter while leading the What Am I Doing Here?!? workshop in Belmont. Here were our major discussion take- aways:

- Assigning true cost to services (sometimes referred to in business as service chain analysis) and budgeting from that perspective is a major mind and practice shift.
- Refreshers for veteran trustees and orientations for new trustees are useful to participants.
- Trustees exhibit professionalism; Directors must be treated as (and expected to behave as) *the* library professional.

As educational institutions with governing boards and professional managers, building in support for development of governors (trustees) and officers (directors), is essential to the continued responsiveness of your library to community needs. Here are our recommendations:

- Attend, in person or remotely, training events and fund (pay for training hours as hours worked; pay mileage) your library professionals to do the same.
- Join an email list or subscribe to an e-newsletter of at least one non-STLS organization:
 - Read for Later: <https://tinyletter.com/libraryofthefuture>
 - EveryLibrary: <http://everylibrary.org/>
- Join a professional organization, as a library or as an individual:
 - NYLA Organizational Memberships (cost based on budget size)
 - Association of Rural and Small Libraries: <http://arsl.info/membership/>

Making our libraries visible and viable are key to sustaining service to all of our communities and it can only happen with continued commitment to education.

Trustee Book Club

For links to the non-published content, visit the STLS webpage. All linked works here take you to the work in STARCat.

Expect More by RD Lankes

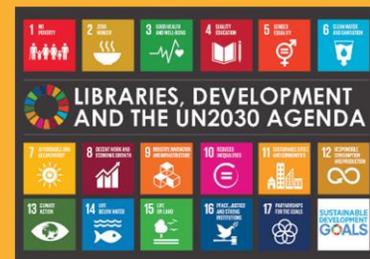
Bibliotech by John Palfrey

THE BAD-ASS LIBRARIANS OF TIMBUKTU by Joshua Hammer

BAD-ASS BOOK CLUB

Participating in the Trustee Book Club is just one way that STLS and Member Library Trustees keep current with what people are talking about in Libraryland. Titles range from specific to your job books for trustees, to general works about libraries and librarians.

Since 2016, STLS has ordered the books and has them delivered to your library for you to share with your board, and/or so you can join the Club conversation.



On occasion, Clubbers have read collections of readings or watched videos to discuss. Check out the *Libraries Out Loud* video series on YouTube, and contact STLS if you'd like a paper copy of *The Future is Now: Current Papers on Library Trends & Research*.



The True Tails of Baker and Taylor by Jan Louch

Sustainable Thinking by Rebekkah Smith Aldrich

The Library Book by Susan Orlean

New Year, Renewed Commitment

[Library Bill of Rights and the Freedom to Read \(Doc.13\)](#)

"Freedom itself is a dangerous way of life, but it is ours."

The above quote is my favorite ever produced by the American Library Association. While not directly a part of the [Library Bill of Rights](#), it has always served as a sort of ethical compass in my professional life. Something like those "Freedom isn't free" bumper stickers. Freedom isn't free, but its dangerous path of defense is openness to our shared humanity. Libraries are beautifully human institutions, dangerously free in that they encourage you to access opinions and perspectives that are not your own; to share space with people who are not like you in potentially fundamental and unsettling ways.

In this new year, resolve to remember that true freedom is also intellectual. Facilitate those interactions between community members that strengthen our social fabric and remind us all how good it feels to be civil to one another.

Continuing Education at Every Level of the Library Institution

Dear librarylanders,

We can't continue to do the work of addressing the needs and facilitating the aspirations of those we serve, if we aren't continually educating ourselves and building a culture of learning and professional development within our organizations. Learning is richest when we share our new ideas with others and hear their perspectives.

This isn't a pitch to come to more stuff at the System - I promise. This is a pitch to talk to one another - trustees to trustees to directors to volunteers to friends to trustees. We have a broad and diverse geography that will be best served by well educated, well connected, and roundly inspired institutions.

Traits of Transformational Trustees - Curiosity

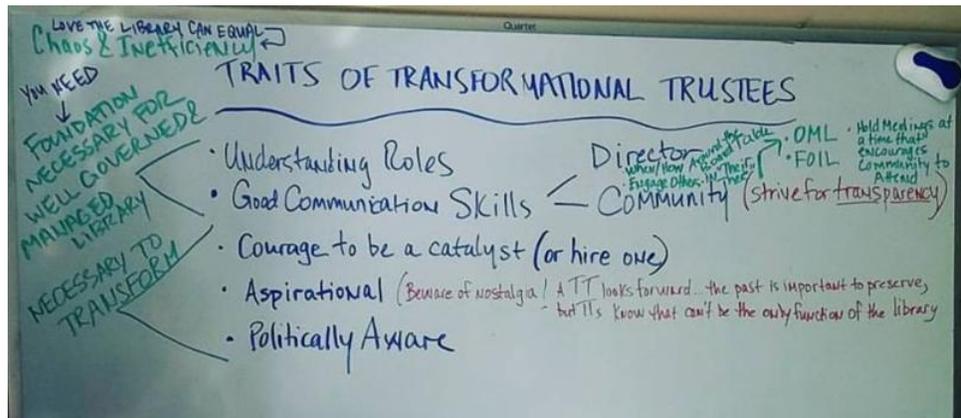
Curious trustees are gratified by the hard work required to transform. Moving from the known toward the unknown means questioning assumptions, turning outside the library to answer questions, and being open to new perspectives or new evidence that contradicts the current ways of thinking.

- Lauren Moore, Executive Director, Pioneer Library System

We have the good fortune in New York, of being able to pull from some of the most brilliant minds in librarianship. Rebekkah Smith Aldrich, Cassie Guthrie, and Lauren Moore are the three librarians who inspired this mini-series in transformational trusteeship.



We work in a profession that prides itself on transparency and collaboration. And our biggest strides take place when we are curious about the work others are engaged in. As trustees, curiosity could be reading these newsletters from STLS. It can also be taking tours of other libraries, visiting other board meetings, and talking with other libraries' trustees. Or talking with your neighbors. Or with complete strangers.



As Smith Aldrich pointed out in the conversation that flowed from the image above, curiosity is humble. A curious trustee seeks to know more about her community rather than assume she knows what her community wants. A curious trustee seeks to know more about the motivations and vision of his library's director rather than assuming his perspective is shared.

In my role as Trustee Development Consultant, I will always encourage you to come to workshops, and to read and view widely in the field of librarianship. None of that participation will matter much, though, if you aren't curious and humble. You must believe the world and the people around you have a lot to teach you and that you are capable of learning, if you want your time on the library's board to be positively transformational and impactful

Traits of Transformational Trustees: Courage

Courage is essential to transformation for multiple reasons. It's clear that change requires a certain comfort with risk that can be seen as courageous. There is a deeper courage that transformational leadership calls on: the courage to catalyze without dominating, facilitate without owning - the courage to trust your organization and your community.

At the start of this year the Institute of Museum and Library Services released a report on cultural institutions working as community catalysts: Strengthening Networks, Sparking Change: Museums and Libraries as Community Catalysts. While the whole report has useful content, I recommend that public library people at least spend time with section IV. Building Capacity to Support & Spark Change. It outlines the conditions for success that need to exist for change to become part of the culture of the library & the community. Culture shifts outlast action shifts. Your courageous spark needs to become crystallized thinking throughout the community for the deepest and longest lasting impact.

Helping All Trustees Succeed Mini-Webinars!

Through the Division of Library Development Archive

Performed primarily by Handbook for Library Trustees of New York State co-author Rebekkah Smith Aldrich, this set of 10-15 minute videos cover topics core to the work of trusteeship:

- [Libraries in NY: Origin, Oversight & Organization](#)
- [Open Meetings Law: Transparent and Accountable Governance](#)



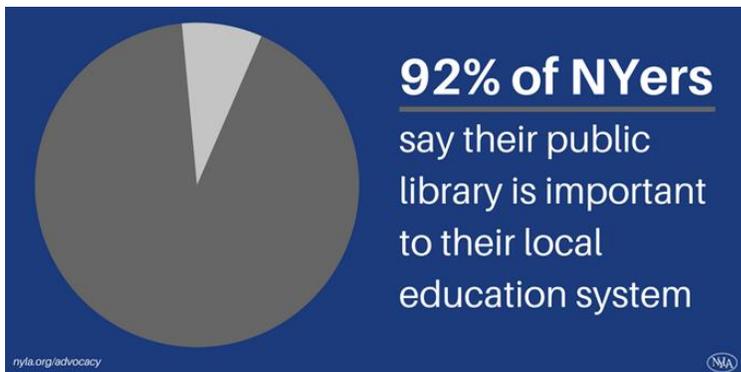
- [Role of a Board President](#)
- [The Public Library Treasurer: Their Role and Legal Responsibilities](#)
- [Board Evaluation: A Key to Your Library's Success](#)
- [Director Evaluation: A Key to Your Library's Success](#)
- [Hiring Your Library CEO: The Future of Your Library Depends On It](#)
- Strategic Planning; Creating a Path for the Future
 - [Part One](#)
 - [Part Two](#)

Consider either watching one per board meeting together, or watching them before the meeting and taking 15 minutes during your meeting to discuss what you learned, what surprised you, and what inspired you to question your current practice. Of course, this set can also be seen as an easy list of consultation topics for which you can request either Brian or I to come chat with you about.

Trustee Tuesday: Libraries Are Education?

Every year library advocates from around New York travel to Albany to show their collective support for libraries of all types. Pictured at right is Jeremy Johannesen, Executive Director of the New York Library Association (NYLA), the professional association which organizes Library Advocacy Day. Our rallying cry? Libraries are education. We are the people's university.

To make "Libraries Are Education" true, we must BE learning organizations.



The term Learning Organization was coined by Peter Senge through his work on corporate leadership. The most cited definition of the term was written nearly a decade as one "**that facilitates the learning of its members and continuously transforms itself**", by other researchers.

It's sort of perfect, right? If public libraries are the education engines meeting the needs of every age and ability level within our communities, then don't we need to be able to facilitate learning of our community members? Further, don't we need to be able to transform ourselves readily to meet those facilitation needs?

Building a culture of lifelong learning in your community begins with building that culture within the library organization. Trustees at almost ALL STLS member libraries outnumber the paid employees of those libraries. **Trustees are key to the development of learning culture.** How do we begin?

1. Consider watching the Webinar "[Building a Culture of Learning with Library Boards](#)", which inspired many of the resources included in this newsletter.



2. Amend your by-laws to show you take the need for trustee continuing education seriously.
3. Decide on a schedule that works for the board - this could be workshop attendance, having a presenter come in, or group webinar watching. The key is to make and keep a schedule.
4. Budget for education - scheduling is a part of budgeting, so is including a trustee education line item to cover select conference fees, book purchases, and/or mileage reimbursements.

Set the expectation during recruitment and include participating in continuing education as part of the trustee job description.

Resources in Practice

Amend your by-laws

Include language in your by-laws that explicitly exhorts trustees to continue their education as stewards of public funds and the public trust.

"Article __. Board of Trustees. Section __. Trustees must be informed and educated on matters related to library governance, administration, funding, facilities, and trends in order to effectively steward. For this reason, each Trustee shall actively engage in three hours of continuing education every year of service on the library board."

Notice that in the language above, we've included an actual target number of hours for all trustees on the board to accomplish within a year. In the sections that follow, you'll see that there are multiple ways to accomplish a whole board approach to participating in 3 continuing education hours every year.

Schedule training

Firstly, let me say that I am EAGER to attend your board meeting. I especially love doing trustee orientation sessions. And really all things governance, taxation, funding, administration, facilities, and library trends. You can schedule those by [emailing me](#) or by using this scheduler: margogustina.youcanbook.me. Don't be shy - I expect to work when you are working as a board - evenings and weekends are within my comfort zone.

Next, consider doing group training, by attending STLS workshops, by reading a relevant book (click here for past Trustee Book Club choices) and discussing one chapter at a time at the start of the meeting, or by taking a portion of the board meeting to view a webinar and pausing for discussion. The big deal here is that learning is best done together - especially if you want to be able to implement what you learn as a board. It is a major part of why we at STLS have been moving toward whole library training and consultation instead of (or in addition to) centralized workshops. We know you're more likely to put a new behavior in practice if you learn it with your team and you all agree on the approach you will take toward it.

Budget for education

If the above schedule was your board's training schedule, you'd need to budget for mileage reimbursement for each trustee at \$.535 x the miles between your library and Painted Post x 2. If you added a book club component, you budget for it. Similarly, you would budget \$30 per trustee for a



New York Library Association Trustee Membership so you could have access to their legal, grant, and advocacy resources. At its most expensive (local book club, NYLA membership, mileage reimbursement to **both** STLS conferences for Trustees), a 9 member board from our most distant library should expect to spend \$2,000. If a board took advantage of the STLS Trustee Book Club, fully attended 1 STLS conference, and had a NYLA membership, a very distant 9 member board would only need to budget \$1,000.

Recruit learners

When seeking trustees to your board, immediately set the expectation for participation in continuing education. Here's a [downloadable flyer \(Doc. 14\)](#) I developed after the work of B. McEwen which is shared in the Building a Culture of Learning webinar linked above.

Additionally, include it in your Trustee Job Description and/or application. Here is our example of a Trustee Job taken directly from the Helping All Trustees Succeed curriculum & handouts, with one minor revision - the explicit inclusion of trustee education.



Rural Libraries Spotlight

The American Library Association just published a report of interest to any library or library district serving rural communities. "[Rural Libraries in the United States: Recent Strides, Future Possibilities, and Meeting Community Needs](#)" explores trends in technology and usage, but also in areas of strength where rural libraries are offering services at rates competitive with large suburban and urban libraries. If you don't have access to a printer and can't read long reports like this online, please send me a quick note and I'll have a print copy out to you through the delivery in a flash.

Govern

Adopt policies and rules regarding library governance and use

What am I doing here?!?!

Great libraries become that way through effective partnerships between Directors and Trustees. In this workshop, we'll clarify the separate but intertwined responsibilities of the public library Director and the library's Trustees. Come prepared to learn something new, have a little juicy discussion, and practice good supportive collaboration. For more on Roles & Responsibilities, see this Trustee Orientation overview [What Am I Doing Here?!?](#), or invite an STLS consultant to come to your board meeting.

Effective Governance with Collective Impact

All of us love to be good at our jobs. Public library trustees are dedicated volunteers who take the work of governing a public institution seriously. Unfortunately, unlike some other education based trusteeships, many library trustees have felt in the dark about what effective trusteeship would look



like as well as how to get work done. What are the bounds of collective authority? Where does the work of the board end and the job of the director begin? Can the board president act on behalf of the board or the library if the full board hasn't given the president specific authority to do so?

Pioneer Library System's Deputy Director, and Helping All Trustees Succeed (HATS) curriculum developer, Ron Kirsop shared his program, 7 Habits of Highly Effective Boards, in Hammondsport. It is all about finding ways to govern together and, through the power of collective authority, make big impacts. The meeting outline he used for that program is [here](#), and the module he created for is [here](#), and finally, the board self-evaluation Ron developed can be found [here](#).

Annual Actions: *Organizational meetings, forms, responsibilities*

Every year, we have certain things we just have to do. In the paragraphs that follow, I'll link out to resource lists and templates. All are meant to be helpful guidance, but not mandates or formulas (except where the thing is the law, and I'll say it explicitly). Visiting <https://www.stls.org/for-member-library-trustees/> is a quick way to see past guidance, or return to any of these documents in the future. For a quick reference on stuff you need to do, see our Annual To-Do Calendars (listed by fiscal year):

- [January - December \(Doc. 15\)](#)
- [April - March \(by request\)](#)
- [June - May \(by request\)](#)
- [July - June \(by request\)](#)

And yes, you do need to file with the IRS.

Annual Organizational Meeting

The purpose of the Annual Organizational Meeting is to settle decisions in bulk that will impact the year's operations and governance. Before you get there, you'll need to already have the slate of new trustees and officers to approve at the meeting. Here is a sample list of the rest of your concerns, though not every part will apply to all libraries:

Election of Officers

- Nominating Committee
- President
- VP
- Treasurer
- Secretary

Board Actions

1. Designation of the Official Newspaper
2. Appointment of the Financial Clerk
3. Appointment of the Internal Auditor
4. Appointment of the External Auditor
5. Appointment of the Attorney
6. Authorization of the Executive Director to Certify Payrolls
7. Authorization of Executive Director to Make Grant Applications
8. Authorization of the Executive Director to certify payments



9. Authorization of the Business Mileage Reimbursement Rate
10. Designation of the Bank Depository
11. Designation of the Authorized Signatories for Checks – President, V.P, Treasurer
12. **Authorization of Certain Payments between Board Meetings** - Credit card, utility bills, lease payments, payroll, payroll taxes, payroll deductions, and fringe benefit expenses. I emphasize this because many library boards do not approve purchases, although, by law, they are required to. It is part of their fiduciary responsibilities. This board action allows for bills to be paid that are semi-fixed expenses, or fall under other procurement policies. To make this work, libraries should have Net 30 or Net 60 accounts with their regular suppliers to allow time for the board to approve the expenditure, without having a late bill. You can see why meeting monthly, or at least every other month, is important to fulfill this part of your role.
13. Receipt approvals
14. Establish Treasurer and Internal Auditor surety coverage for the year

Annual meeting schedule (days, times, locations)

Appointment of New Trustees (their terms do not begin until your next meeting)

Oaths of Office (Trustees) – We recommend all new or renewing trustees take the Oath of Office and that this action be recorded in the minutes. Only "true public" libraries are required to file these witnessed oaths attached to minutes, with the County or Town Clerk.

Re-approval of by-laws Many governance decisions throughout the year are either enabled, or impinged by your by-laws. Give them a considerate once-over and amend them as needed. Included in your by-laws is the procedure for your meetings. There are, in general, two sets of procedures that every board officially follows. Either, Sturgis ([here is a simplified cheat sheet](#)) or Robert's ([here is a guide](#)). It matters much less which you follow, that what you do is consistent from meeting to meeting.

Workplace Violence Act

You caught me, there has been no change to this law in more than 10 years. I included it because some of our public libraries have grown in staff, services, and size and may have forgotten (or never knew) that this law applies to them to. According to the Workplace Violence Act of 2006, your library must have a protocol in place for handling incidents of violence, a policy which outlines both the training of that protocol, and the prevention practices that the library will put in place to keep those who work and visit there safe.

Policies Are Not One Size Fits All

There are some policies that library boards will ratify because they are the law and tinkering with them might not help the board, the director, staff or patrons make decisions (which, after all, is the whole point of a policy). That said, STLS has made available templates for those legally required cookie-cutter templates on the website: <https://www.stls.org/for-member-library-trustees>.

One impossible to cookie-cutter, but absolutely necessary policy is the patron behavior policy. Some libraries call it a code of conduct, some a rules of use – whatever the title, the policy exists to help patrons and staff to have a common understanding of what is acceptable behavior in the library. For a walk-through of policy considerations, see Patron Behavior Policy – Sample with Guidance (Doc. 16).



Another never-standard policy is Facilities Use or Meeting Room use. We prefer to share a list of question based considerations with libraries. In answering the questions, you will have developed all the guidance you will need to open your space up for non-library sponsored events. Visit <https://tinyurl.com/yblfq4kq> **Doc. 17** to access this list.

Equip

Maintain a facility that meets the library's and community's needs

Our Building is Our Face to the Community

What seems like a million years ago, as a young mother without a formal education, I needed to decide if I would follow a path to librarianship or architecture. Anyone reading this knows which direction I went - still, our buildings have a special place in my heart and in my practice of library service.

The spaces we offer the members of our towns communicate feelings and ideas to them. Our members know when crossing the threshold of the library if they feel welcomed or intimidated, if they are inspired or disrespected. When I speak to libraries about NYS Construction Aid to Public Libraries, facilities planning is a requirement of the program. Time and again the resource libraries wish they had access to is an expert. You want an architect. We have brought you one.

Your Library As Place

Construction Aid for Public Libraries is one way we can support our members in making their libraries THE PLACE in the community to bring people together, to serve their learning needs and passions, and connect them to the right resources at the right time.

"Creating the environment within your library, and within your library culture, that makes every single community member feel as though the library is their place, best suited to serve their community."

When we library people work to translate abstract values into action, we sometimes lose our way. At this summer's STLS Trustee Retreat, internationally recognized speaker, planner, and doer John Boecker will facilitate a highly interactive session for public library trustees. We have invited him to assist in identifying the unique value your library can provide your community, how this value aligns with the unique features and assets of your community, and how to realize the potential in that alignment in everything we do.

The word often used for this alignment is placemaking. Creating the environment within your library, and within your library culture, that makes every single community member feel as though the library is their place, best suited to serve their community.

In your interactions with STLS, you might notice there are areas where we press for standardization and areas where we press for localization. There is no standard culture or cookie cutter program that will work in every community. Instead, we'd like to help you connect with the resources you need to bring out the best in your local culture and place.

Consider registering for Placemaking at Your Library with John Boecker, on June 7th, 2018 at 5:30 pm. Your libraries have each received enough registration forms to give to one to each board member. After our 5:30 pm session, we'll have an optional catered dinner for you.



STLS also has two pages for your reference on related topics: [Strategic Planning & Facilities](#). If, after visiting them, you find that they are missing information you would find useful, or you have additional questions, please send me a note and I'll get back to you.

Sustainability: The Community Sweet Spot

I'm in a room with 26 people who have been working on an immeasurably large challenge - creating communities that can withstand, bounce back, and breathe new life after disruption.

The [New York Library Association's Sustainability Initiative](#) (NYLA-SI) has been building content and tools to facilitate your library's role in the community as a leader.

Here are the [things the NYLA-SI are building to help your library](#):

- Road Map to Sustainability (cover pictured at right), two copies of which we'll send to every library Friday - one for the director, one for the board president
- Benchmark on Sustainability for your library
- Agents of Change training program (Free! Applications open in May!)
- Making the Case archive of examples of libraries doing the work of sustainability in their communities
- Making the Case Glossary of Terms to help you in communicating your own initiatives

In all the work the NYLA-SI is doing, and the work STLS consultants do with you, our commitment is to ensuring your library is the heart of a thriving community in a 100 years. Over the coming months as new tools are released to the public, I'll share them with you. If your library is interested in piloting any tools, please contact me.

Library Design & Facilities Planning with Paul Mays

To quote one attendee: "Paul Mays' gives one amazing presentation!!!". Library architect Paul Mays did two distinct but linked sessions. The first was all about general library design and pitfalls to look out for. The second was filled with practical considerations for planning, as well as for funding, and engaging the community in the design process. Oh, not to make the folks that couldn't attend feel terrible, but he then hung out and answered library specific questions for an hour. Really. Dang.

Content heavy slides he sent for your reference: [Mays Recommendations from Presentation](#)

Paul mentioned that your building should reflect the services and attitudes you have toward your community. His system developed this tool to help: [Facilities WalkAbout exercise Doc. 18](#)

Capital Funds: Why, How, What

It's Construction Aid season again and I've been fielding questions about how to plan financially for the rehabilitation of capital assets. Remember, I'm a librarian, not an accountant. The resources and opinions below flow from our research on these funds, but are not, in themselves, a fiduciary recommendation.

What is a Capital Fund?

A capital fund is defined by the NYS Office of the State Comptroller as an "[account for financial resources to be used for the acquisition or construction of major capital facilities](#)". A capital fund is not



an account for annual maintenance of your equipment or facilities - for recurring known maintenance expenses, you simply have a line item in your operations budget. Rather, a distinct capital fund is specifically for projects and rehabilitation and renovation of your facilities and the equipment inside.

While a capital fund doesn't need to be kept in a fully separate account, doing so makes the accounting for the fund cleaner and clearer.

Why would the library start one?

In our experience, libraries open a capital fund when one of two things is occurring: the library has more money than it budgeted for, but no savings for unanticipated capital expenses. In this case, where there is no specific project known, a capital fund is called a **capital reserve fund**, and not exceed a quarter to a third of the library's annual operating budget.

The other common beginning of a capital fund is for a specific building project. This type of capital fund is called, predictably, a **capital project fund**. For multi-year projects, as well as very expensive ones, this fund allows for transparency for donors interested in contributing to a capital campaign, as well as to grant-making entities who might ask auditing or clarifying questions about your matching funds. Having the line of checks cut come directly from the capital fund to the building professional means showing a bank statement or pulling a report, displays a clean record of money in and out related to the project.

How would the fund be managed?

The Governmental Accounting Standards Board has a [collection of recommendations on year over year fund balances](#), which is exactly what capital funds do. In order to fully appreciate some of their recommendations, one must take on the perspective that a publicly funded organization, like a library, is supposed to spend all the revenue it receives in a fiscal year for the purpose of serving, according to their mission, those same tax payers. Many association libraries don't have a practice of full account balance spend down.

If you did, then having specifically designated funds that are accounted for separately for the express purpose of upcoming capital expenditures, would be very nearly necessary. The practice of managing these funds will conform to your local accounting practice. Many libraries don't spend directly out of capital funds, and instead transfer funds into their operating account in order to expend them. I encourage you to speak with your accountant or bookkeeper on the practice that would work best for your library.

Lastly, these funds cannot be managed outside the bounds of the prudent investment rules, which allow for time-bound certificates of deposit and money market accounts, but no other private investment. Remember, these funds aren't designed to be kept forever. They have a purpose that is better served as immediately accessible, in case of immediate need.

In 2018, the Southern Tier Library System will be expanding on the Summer Reading Program theme (Libraries Rock!) and the New York Library Association's theme (Making a Difference...Together) to bring you conferences and programming that assist you in making your library the heart of your community. The word we've started using is mutualism. The Merriam-Webster definition is the "doctrine or practice of mutual dependence as the condition of individual and social welfare.



Field Trip!

Sometimes we need models to follow in order to move the direction we see service headed. Join us for a chauffeured trip on a commercial bus to visit and discuss the facilities and collection display at Fayetteville Free Library and Onondaga County Public Library. We call it our Ditching Dewey trip because while many of our libraries have asked about moving their non-fiction collections to an easier to understand and use organization - but we need models! We also visited Greece Public Library and the Rochester Public Library's Toy Library.

\$880,000 Available to STLS Member Chartered Libraries

The New York State fiscal year 2018-2019 has passed with a bonded allocation of \$34 million to fund public library construction across the state. For our membership, this means a nearly 45% increase in our local funding allocation, allowing us to provide more than \$880,000 in assistance to member library projects.

Have a project you'd like funded? None of the other eligibility rules from the state have changed for this 2018-2021 funding cycle. So, while we haven't locally approved all Aid forms STLS members will be using, I can offer you this quick list of requirements:

- Must have matching funds of at least 25% of the total project cost (Have \$50k? You can do a \$200k project).
- Total project costs cannot be less than \$5,000
- You must be prepared to begin your project by October 2019 (you'll receive 90% of project funding by then)
- Dust must fly! DASNY requires that the funds be used **primarily** on permanently installed or constructed features. Furniture and other equipment can be included as a minor part of an overall renovation.

Other considerations include if your building is over 50 years old and your project will in any way involve disruption to the appearance inside or outside of your building, you need SHPO approval. Don't delay on this - it takes a minimum of 30 days, and for every request for additional information, another 30. See the SHPO section of our [Facilities resources page](#).

I've set up a [webinar](#) and an [in-person workshop](#) to help give you an overview of our local STLS process for allocating funds and how it leads to the state's application system. All forms relating to the application process for our members can be found at <http://www.stls.org/construction-aid>. If you are still just kicking around ideas and you'd like to explore resources that could help focus your thinking, visit <http://www.stls.org/facilities>. Consider using the Usefulness tools ([Walk-About](#) and [Ease of Access](#) Doc.19 are both listed) to help you get a sense of ways improving your building could improve the services you provide to your community.

Every year STLS receives approximately \$1.5 million in funding requests for eligible construction projects. We are as excited as you are that this year we may be able to fully fund your projects. Help us get that work done by contacting us soon to let us know what you are thinking.

The general timeline for this program is the same every year, with minor changes in funding levels and requirements.



April: Construction Aid allocation amounts announced & forms sent out

July: Application forms due

July: Applicants present their projects to the STLS board

Part of the application process is understanding your facility and its needs. Try using this [Facility Plan template](#) (Word document). Once you have mapped out your vision for the library building and space, check out the Construction Aid Program's [Priorities and Guidelines](#) Doc. 20 for which projects could be funded at a 75% match by this program.

Payment Doesn't Happen Until the Following Fall!

Advocate

Promote the library in the local community and in society in general

Advocacy, Naturally

The last thing I want to do is alarm you. Libraries have persisted through all funding climates and will continue to do so. If you were already approved for a Construction Aid grant, those funds are not in jeopardy. And yes, this is a game the Governor plays annually to force state legislators to use all their bargaining power on your behalf.

As the super smart Carol Berry asked at our last meeting with legislators, ***if this is an annual game, how do we play?*** The answer is write. Write write write and talk talk talk. Letters and phone calls are fine, but we also want you to be aiming your messages at newspapers, radio, and community television. Our legislators: Cathy Young, Tom O'Mara, Phil Palmesano, Joe Giglio, and Chris Friend go to bat for us every budget season. Now it's time to let the Governor know, through your local media sources, what cuts and flat funding mean for your local communities.



Talking points you might want to help community members include when they reach out to the Heralds, Gazettes, Observers, and the local WEs:

- Libraries = Education: When public education was cut and community centers closed, it is the local public library that stepped up. When a school district removes a student from the classroom environment, they go to school in the public library with a district provided tutor. In our communities without Universal Pre-K or limited pre-K, families AND private day cares turn to the public library for early literacy training. These are public education functions that became unfunded mandates for public libraries.



- **Shared Services/Government Efficiency:** A current priority of our state government is efficiency and shared services. Yet, the Governor's current budget The Governor's budget directly negatively impacts the system's ability to deliver on the promise of our cooperative library system by restricted facilities aid (almost all of our public libraries can't put up Capital Bond votes, and instead need to rely on Construction Aid to which the Governor proposes a \$5 million cut). Local libraries receive resources from policy development to promotional materials to program resources and education kits from the library system - funding for which is cut by nearly \$5 million across the state.
- **Libraries = Broadband:** In the Southern Tier Library System area, libraries provide high-speed (100x100 mbps) broadband connections to 11 communities at the time of this newsletter. By the end of 2017, 25 communities will be connected, using a new, non-profit built infrastructure that allows for cost-savings of up to \$700/month/per site over the commercial competition promoted in the NYS Broadband for All program. A program that has yet to create new infrastructure for a single community. Without Construction Aid or State to Library Systems, STLS's successes and cost savings would simply not happen.
- **Retreating Services to Rural Communities:** In our overwhelmingly rural region, we have seen local agencies and field offices close, or consolidate, first its administration and then its staff, to regional urban centers. In many of our smallest, most resource poor communities the library is last civic organization standing. It is our community defender against rural flight and the ghettoization of geographically isolated populations. When funding to libraries is cut, where will Healthcare Navigators meet with clients? Supervised visits with families occur? A fax to the insurance company be sent from? Bonebuilders class? Social interaction that make aging in place desirable for our elders?

If your local library is providing these services, talk to your community partners - those most impacted by the service - to reach out to their media sources and share their stories. Talk to your tutors, group leaders, healthcare navigators, and parents and let them know to contact the newspapers, talk on Facebook, and radio/tv stations. Remind them to call out the Governor by name so his aides know how he is being talked about and that while libraries only cost the state 1/10 of 1% of the budget, we can make 100% of the ruckus.

Research & Evidence Matter

We have a problem at the system. We want the turnaround time to be faster between the moment of delivery to STLS (either through STLS delivery or direct from a vendor) and when the library receives its material for shelving. As a member of STLS's Division of Sustainability, one of my priorities is to ensure that our services can be maintained through disruption and change - like hundred year blizzards (that appear to be annual), staffing shifts, and increases in member materials purchasing.

Last week we met to discuss how to make our collection services (processing, cataloging, finishing, and delivery) more efficient and effective. We realized that circumstances had changed so dramatically since the services were designed in 1959, that we needed additional information to map a path forward. We needed research. We launch a time study Monday and will be trialing different rhythms and methods over the coming weeks. In the coming months and years, our members will benefit from



improved service because the hard working people in cataloging, processing, and delivery were purposeful, thoughtful, and innovative so that their hard work could mean big positive impacts. We can't make effective change without research.

As our current research is to processing, so is the Institute of Museum and Library Services to the profession of librarianship. Brian has written to you at length about the direct dollars that come from the IMLS. In my work, the impact of IMLS is the evidence to back up our actions and best practices. They help our profession to be a profession rather than just a group of motivated do-gooders.

While consulting librarians would like to think that working at the system provides the consultants, whose job it is to be your librarians, gobs of research time, it is extremely rare that we conduct research beyond what a member library worker would do for a patron during a moderately complicated reference interview. Large studies looking at impacts of different styles of program and program delivery, building design, and collection management - event pest control (!) are outside of our capacity. Luckily, they are conducted and or funded by the IMLS. They are done or funded at the federal level because the results are common for libraries across the nation. Like, every teen needs programming highly relevant to their social experience. Sure, you knew that (maybe). We have evidence to back it up with program planning tips (thanks IMLS).

Our next Trustee Book Club focuses on papers - quite reader friendly research - that maps the future of libraries for us. They chose this as our next read because it excited them. Now we know that the primary support for most of these papers is defunded in the 2018 Federal Budget. Consider contacting your representatives to voice your opinion on that.

You believe that libraries provide essential services for the well being of all your community members. Share that passion and advocate on behalf of your library and your community!

As always, NYLA is relying on everyone to take action, and contact your elected officials through NYLA's online advocacy tools, encourage your colleagues and patrons to participate in these actions. Encourage everyone to "Get on the List" NYLA has developed, and visit nyla.org/advocacy for



updates. When engaging with your elected officials, it is important that you discuss the great work you and your library are doing, and to also stay on message by using the talking points we have on our website. For those of you on social media, we have posted a set of tweets that we encourage you to use, and tweet at your local Assemblyman and Senator.

LIBRARY ADVOCACY DAY is Wednesday, February 27, 2019! Come to Albany and make your voice heard!



Transparently

Conduct the business of the library in an open and ethical manner in compliance with all applicable laws and regulations and with respect for the institution, staff and public.

To what end?

Why does the library provide that service? Why does the library have paid staff? Why does the library have a facility that is ADA compliant, or is separate from the school's facilities? Why does the library need to purchase collection materials? Why is the library a part of this community?



Campaign questioning library transparency, financial management leads to more than 500-vote difference

Effectively articulating the why of your organization is good for funding, but it is also good for public trust.

Each trustee and director must be able to answer these questions for themselves and believe the answers in their heart. We must also be able to answer these questions publicly and transparently.

(Yes, you are subject to [Open Meetings Law Doc.21](#), including what can and can not be the subject of [Executive Session](#) and how the reason and result of those sessions are described in the minutes.)

Not a headline any library wants.

That transparency can feel uncomfortable for some trustees, but it works in your favor. Libraries are still some of the most trusted institutions in the nation and that trust stems directly from our commitment to transparency and truth.

(For more on what happens when a library isn't transparent, read [Fayetteville Free Library's story](#) and the consequences of a board fighting against the public's right to information.)

When you as individuals, and then collectively as a board, come to believe in the whys behind the library's services and activities, transparently articulating your decisions becomes easier and more comfortable.

At what cost?

The library is a shared community resource governed by a voluntary board of community members entrusted with stewardship of the resource, and managed by a professional whose focus is on how libraries and librarianship best serve communities.

The library's resources are not free. The costs are shared by all community members, typically through a vote mechanism (yes, renters pay taxes through their rent), because the library is a valued resource that is less expensive and provides greater benefit when shared among many than when held individually and privately.



You read it and you know it to be true. How are you doing at articulating your whys and hows to your community?

Your budget is one tool with which to do that communication. Consider joining Brian and I for the **Service Based Budget** workshop immediately following the Directors' Advisory Council meeting.

Another is with your planning documents, and how you tie your reports to the community back to your plans for serving that community. As we close out the year, I'll be sending out resources and tools to assist you in building your report outs. Feel free to reach out at the start of the year for assistance in developing those reports, especially if your library doesn't usually send out a report to the community.

Putting the Public in Public Libraries

By show of hands, how many of you have made a joke about the public comment period of your board meetings? In the past month, I've personally heard at least two.

It's the easy joke we tell because we all know it is uncomfortable to be either caught unawares by the uncontrollable will of the people who have shown up to speak or to note that no one was interested in showing up at all.

Last week I was reading about the ten year process the residents of Belmont went through to get a library building from cornerstone to opening day. The paper of the day declared that for nearly a decade the men of Belmont ate cold suppers. Our region's public libraries were begun and developed by dedicated community members, committed to twin ideas of education and democracy.

The How that gives meaning to the Why

You post your upcoming meeting dates. Good! Do you tell your neighbors what difficult decisions you have to make as a trustee and invite them in to help you with it?

You post your minutes. Good! Do you hold public forums on your annual budget? Do you ask at the Lions/Rotary/Elks/VFW/Auxiliary/Kiwanis if they can partner with you to extend your resources beyond what your budgets describe?

Many of you have excellent mission statements, the "Why" of what you do, which include some element of empowerment through education. Take a moment to consider that the "how" behind it - the practices you employ to govern and operate the library, will determine the breadth and depth of your impact in the community you wish to serve.

When you behave transparently in all your library dealings, actively seeking input and participation from the public not only at fundraising time, but also in planning and implementing programs and services, your practices will increase engagement. In order to truly appreciate the nested quality of the library in the larger community which supports it, the library must actively prove that relationship with openness in what it shares, and also what it invites.

Open Meetings Law

I have received many questions about FOIL in the last few months. Before approaching FOIL specifically, which has special considerations depending on charter type, I'd like all libraries to



understand that Open Meetings Law applies to you. And that the law might be more strict than you realized. Here are practices mandated by [Open Meetings Law](#):

- Every official meeting of the board at which a quorum is present is open to the public
- Executive session can only be entered under very specific circumstances
- Every document that will be discussed at the board meeting, including the Director's report, financial reports, and lists of warrants, must be made available to the public at least one week prior to the meeting
- Every working session of the board is also open to the public

Considerations for Association Libraries

Association libraries are not obligated to satisfy FOIL requests. That said, there is nothing that raises suspicions quicker than a publicly funded entity refusing to share documents related to their governance and operations. Also, note that most so-called FOIL requests are from members of the public asking for information libraries are obligated to provide under Open Meetings Law. If you are an association library trustee, don't ignore a request for information because FOIL doesn't apply because everything listed above must be readily available to the public to be compliant with Open Meetings Law.

Changes in Non-Profit Law

The big change from the initial drafting of the law and even from its 2012 revisions, is the requirement that all libraries (via their incorporation by the Regents, ([see NYSED's explanation here](#)) will not only have a Conflict of Interest policy, they will also have a procedure by which all those with purchasing power (trustees, director) will annually fill out a [Disclosure of Interest form Doc.22](#). They will also fill out this form when a conflict arises (going out to bid on an item).

Conflict is about material or perceived material benefit. Should publicly funded employer hire a family member? Ooh! You knew that it was wrong by just reading it. You think, of course the mayor should hire his son to pave all the streets in town when there are clearly other businesses. Apply this reasoning to all the actions in your library, with clarity and consistency.

Culture Not Just Compliance

Having an active and engaged community in the library takes a shift in board culture to invite and respect public opinion in all things. That can really slow down the works, at first! It can also mean that your library isn't always struggling to find people to run for office or to volunteer their time to serve on the board. Your organization can only effectively sustain its actions if more members of the community are involved.

Yours, in learning and in librarianship,



Margo
Margo Gustina | STLS Deputy Director

