

**CORRESPONDENCE RECOGNIZING STAFF
FOR MHLS BOARD MEETING OF MARCH 19, 2016**

CORRESPONDENCE

- Thank you letter to Tom Sloan, Executive Director, from Kristen Huss, Loaned Executive, United Way of the Dutchess-Orange Region, for the System's participation in the 2015 campaign.
- Thank you letter to Tom Sloan, Executive Director, from Ellen Rubin, Barnes & Noble Holiday Book Drive Coordinator, for the System's partnership in the 2015 Empire State Center for the Book project.
- Thank you email to Tara Stohr, ILL & Cataloging Specialist, from Linda McAteer, Woodstock Public Library, for her considerable time and effort she took to create records for and catalog "the Bioneers".
- Thank you email to Merribeth Advocate, Assistant Director, from Patti Haar, Director Patterson Library, and Lillie Muscente, Public Relations/Event Coordinator at the library, for administering the Adult Literacy Library Services Program which has helped their library provide adult literacy services.
- Thank you email to MHLS staff from Maureen Garcia, Director Mountain Top Library, for supporting new directors with the Annual Report process.
- Thank you email to MHLS staff from Elizabeth Potter, Director Phoenicia Library, for quickly providing data to assist with the completion of their Annual Reports.
- Thank you email to Merribeth Advocate, Assistant Director, and Kerstin Cruger, Marketing and Program Assistant, from Ellen Rubin, Barnes & Noble Holiday Book Drive Coordinator for Empire State Center for the Book, for assisting with the regional book distribution.
- Thank you email to Rebekkah Smith Aldrich, Coordinator for Library Sustainability, from Patti Haar, Director Patterson Library, for sharing her time, knowledge and counsel with her library's Board.
- Thank you letter to Tom Sloan, Executive Director, from Speaker of the House, Carl E. Heastie, for welcoming him to the 103rd Assembly District, during his recent visit to the Ulster County.
- Acknowledgement of the work of Rebekkah Smith Aldrich, MHLS Coordinator for Library Sustainability on the new *Handbook for Library Trustees of New York State* by the Public Library System Directors Organization of New York State, Minutes of the 10.22.16 PULISDO Meeting.

- *Library Hotline* articles: Rebekkah Smith Aldrich on a Standard Trustee Curriculum, 11.23.15; Rebekkah Smith Aldrich on the 2015 NYS Trustees' Handbook, 11.30.15.
- Library Trustee Association of New York State Newsletter, Winter 2016: Acknowledgement of the work of Rebekkah Smith Aldrich, MHLS Coordinator for Library Sustainability on the new edition of the *Handbook for Library Trustees of New York State* and her efforts to develop a statewide trustee education curriculum in "News from the State Librarian, From the Desk of Bernard A. Margolis, New York State Librarian and Assistant Commissioner for Libraries" ; Thanks given to Rebekkah Smith Aldrich, MHLS Coordinator for Library Sustainability for her co-authorship of the new edition of the *Handbook for Library Trustees of New York State*, "Unveiling of the 2015 Edition of the Handbook for Library Trustees".
- Thank you card from Tom Lawrence, Executive Director of the Poughkeepsie Public Library District, to Rebekkah Smith Aldrich, MHLS Coordinator for Library Sustainability for her presentation at their February board meeting.
- Thank you note from Patti Haar, Director of the Patterson Library, to Rebekkah Smith Aldrich, MHLS Coordinator for Library Sustainability, for her consultation with Patterson Board President Don Ferraro and herself.
- Thank you card from the Friends of the Poughkeepsie Public Library District to Rebekkah Smith Aldrich, MHLS Coordinator for Library Sustainability for her coordination of the Friends Support Group at their Boardman Road location.
- Thank you note from Patricia Placona, Board President of the Roeliff Jansen Community Library, to Rebekkah Smith Aldrich, MHLS Coordinator for Library Sustainability, for her work to organize a successful Library Advocacy Day.
- Thank you note from the Friends of the Poughkeepsie Public Library District to Kerstin Cruger, MHLS Marketing & Programs Assistant, for her work in coordinating the MHLS Friends Support Group held at the Boardman Road Friends Book Store.



HUDSON VALLEY
RENEGADES



NYPL All-Star Game August 16, 2016

January 20, 2015

Mr. Tom Sloan
Mid-Hudson Library System
103 Market Street
Poughkeepsie NY 12601

Dear Mr. Sloan,

On behalf of United Way and our entire community, thank you and the Mid-Hudson Library for your participation in the 2016 United Way Campaign for the Common Good. Your support lent to a successful campaign. We greatly appreciate your efforts and we want to thank you and your fellow employees for making a pledge to support our community.

The Mid-Hudson Library System's generosity is exemplary. Your contribution clearly demonstrates your organization's dedication to building a stronger community. We are especially grateful to Peggy Winn, your Employee Campaign Manager, who did a wonderful job helping to organize your workplace campaign. Please extend our thanks to all who participated in this campaign.

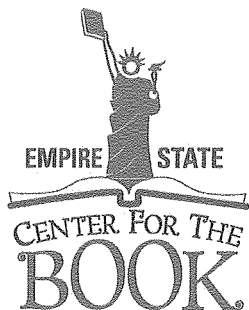
If you would like information from United Way about how to stay informed and keep your employees engaged year round, please visit www.uwdor.org.

United Way of the Dutchess-Orange Region envisions a community where all children will succeed in school and life, families will be financially stable, and our neighbors will have the opportunity to lead healthy, productive lives. Thank you for helping to make our dream a reality.

We wish you and your employees the best in 2016.

Sincerely,

Kristen Huss
Loaned Executive
United Way of the Dutchess-Orange Region



New York Library Association

6021 State Farm Road, Guilderland, NY 12084

518-432-6952 | 518-427-1697 FAX

info@empirestatebook.org | www.empirestatebook.org

January 31, 2016

Tom Sloan
Executive Director
Mid-Hudson Library System
103 Market St.
Poughkeepsie, NY 12601

Dear Tom,

The Empire State Center for the Book would like to thank MHLS for allowing us to store, house, and distribute the 5731 books collected during the 2015 Poughkeepsie Barnes & Noble Holiday Book Drive. Being able to move freely around the auditorium space as we sorted and then distributed books was a pleasure this year. Over 60 public libraries, prisons, school libraries, and social service agencies sent representatives to obtain books on January 19-27, 2016. Those people who had participated in the distributions in previous years were very happy with the new space. In addition, the online registration made my life much easier!

I particularly want to thank Merribeth Advocate and Kerstin Cruger for their invaluable help this year.

Sincerely,
Ellen Rubin
Barnes & Noble Holiday Book Drive Coordinator
Empire State Center for the Book

From: "Linda McAteer" <Ind_mctr@yahoo.com>
To: "Tara Stohr" <tstohr@midhudson.org>
Sent: Friday, February 5, 2016 3:44:09 PM
Subject: Bioneers

Hi Tara,

Great job cataloging the Bioneers! I printed a copy of one of the new records to use as an example. Thanks for your help.

Linda McAteer
Woodstock Public Library

Merribeth Advocate, MHLS

From: Patti Haar <phaar@pattersonlibrary.org>
Sent: Wednesday, February 10, 2016 11:31 AM
To: Merribeth Advocate
Cc: Lillie Muscente
Subject: FW: Reporting & Funding for the Adult Literacy Mini-Grant Award for your library
Attachments: Adult Literacy budget application 2016 revised budget.doc

Importance: High

Thanks, Merribeth, for your continued efforts to administer this grant program. It has helped our library significantly and will continue to do so in this final year.

Patti

From: Merribeth Advocate, MHLS [mailto:madvocate@midhudson.org]
Sent: Wednesday, February 10, 2016 10:07 AM
To: 'Tom Lawrence' <tlawrence@poklib.org>; director@grinnell-library.org; 'Patti Haar' <phaar@pattersonlibrary.org>; mmenard@kingstonlibrary.org; 'j sherman' <j.sherman@grinnell-library.org>
Cc: 'Joan Kay' <jkay@midhudson.org>
Subject: Reporting & Funding for the Adult Literacy Mini-Grant Award for your library
Importance: High

Directors at Adriance, Grinnell, Kingston, Patterson:

Regarding the MHLS Adult Literacy Library Service Program 2013-2016 Mini-Grant awarded to your library:

Due to an increase in the funds for the Adult Literacy Library Service Program, your library will be able to receive a check for this final year of the program for \$2,018.25 (under this program your library received \$1,907.25 in 2015 and \$1,509.80 in 2014).

In order to do that I need each of you to **fill out a Revised 2016 Budget Sheet** (attached) with has the new total, and send it back to me as soon as you can. These are restricted funds that come from New York State Library's Adult Literacy Library Services grant program. A reminder of what the funds may and may not be used for appears at the bottom of this email.

As in the 2 previous years we will be asking you in early June to provide statistics from this program for the time period of 6/1/15 - 5/31/16, and at that time will also ask for blank sample of a student survey or assessment form used in the program. A reminder that these funds are targeted to develop and expand adult literacy programs which will enhance workforce development services in your library, and improve adult literacy on the job and in the home. So any programs/services/materials that you provide that meet that goal can included in the counts.

Thank you for your continuing efforts to support and promote adult literacy in your region. Please note that this will be the final payment from the 2013-2016 Adult Literacy Library Services Grant Program.

Merribeth

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About the MHLS Adult Literacy Library Service Program Mini-Grant Project:

Merribeth Advocate, MHLS

From: Lillie Muscente <pr@pattersonlibrary.org>
Sent: Friday, February 12, 2016 11:57 AM
To: madvocate@midhudson.org
Subject: Adult Literacy Budget Application 2016
Attachments: 2016 Adult Literacy.pdf

Hi Merribeth,

Attached is the Adult Literacy Budget application for 2016. Thanks again for all of your work on this initiative. It is truly helping us to provide our patrons with essential adult literacy services.

Regards,
Lillie

Lillie Muscente

Public Relations/Event Coordinator

845-878-6121 ext. 14

Merribeth Advocate, MHLS

From: Rebekkah Smith Aldrich <rsmith@midhudson.org>
Sent: Wednesday, January 27, 2016 5:52 PM
To: 'Merribeth Advocate, MHLS'
Subject: Thank you from Maureen Garcia

“Thank you to MHLS again, that was such a wonderful and informative little class on the Annual Report. I do so sincerely appreciate the support all of you graciously and patiently provide us newbies! ”

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Rebekkah Smith Aldrich
Coordinator for Library Sustainability
Mid-Hudson Library System
103 Market St., Poughkeepsie, NY 12601
845.471.6060 x239

From: Elizabeth Potter [mailto:director@phoenicalibrary.org]
Sent: Thursday, January 14, 2016 12:40 PM
To: Merribeth Advocate, MHLS <madvocate@midhudson.org>
Subject: Re: [MHLS-Alerts] Annual Report: Data from MHLS arriving in next delivery

Merribeth,

You all are so fast, thank you so much! Looking forward to getting my packet.

Liz

On Thu, Jan 14, 2016 at 12:01 PM, Merribeth Advocate, MHLS <madvocate@midhudson.org> wrote:

MHLS Member Library Directors:

In your next delivery you will receive a brown envelope labeled "Library Director: Important Annual Report Information". It contains:

- Sierra data for answering:
 - Library Collection questions 2.1, 2.2, 2.4, 2.5, 2.10, 2.13, 2.14, 2.17-2.19, 2.21-2.23, 2.27-2.30
 - Library Use questions 3.2, 3.3
 - Library Transaction questions 4.1, 4.2, 4.4, 4.5, 4.8 - 4.10, 4.16, 4.17
- Financial info from the MHLS Business Office for answering questions 11.1, 11.3, 11.5-11.7, 12.7, 12.26
- The Summer Reading Report you submitted to MHLS, which has the answers for many of the questions in the Summer Reading section (questions 3.27– 3.48)
- If your website is managed by MHLS, data is enclosed for answering question 5.4

Contacts for Annual Report support:

- General questions, user names & passwords, software functionality issues: Merribeth Advocate (madvocate@midhudson.org or x254)
- Sierra information provided by MHLS: techsupport@midhudson.org
- Financial information provided by MHLS Business Office: Joan Kay (jkay@midhudson.org or x214)
- Summer Reading Report questions: Kerstin Cruger (kcruger@midhudson.org or x250)

There are still openings in the following hands-on sessions of the "Annual Report Workshop for New Directors" workshop. This program is designed for Directors who are new to submitting a NYS Annual Report online with Bibliostat software, but is open to all.

- Monday, January 25 from 10:00am - 12:00pm.
- Monday, January 25 from 1:00pm - 3:00pm.
- Tuesday, January 26 from 1:00pm - 3:00pm.

Merribeth

Merribeth Advocate, MHLS

From: Ellen Rubin <ellenbr47@gmail.com>
Sent: Saturday, January 30, 2016 5:53 PM
To: madvocate@midhudson.org; fvzcolors@aol.com; rebecca.gerald@dcbores.org;
kcruger@midhudson.org
Subject: Empire State Center for the Book B&N Holiday Book Drive

I want to sincerely thank all of you for your help in making sure the post-Holiday Book Drive was so successful. Picking up boxes of books, helping to sort, and assisting me when needed during the distribution days over the past two weeks has made my "job" so much easier this year. Merribeth-please thank Jerry for me!

Best regards,
Ellen

-----Original Message-----

From: Patti Haar [<mailto:phaar@pattersonlibrary.org>]

Sent: Tuesday, February 23, 2016 8:36 AM

To: Rebekkah Smith Aldrich <rsmith@midhudson.org>

Subject: Thank you

Hi Rebekkah,

Thank you for your time and counsel yesterday. It was so good of you to listen to us for hours! And sharing your wealth of knowledge was helpful, as always!

All best,
Patti

Sent from my iPad



CARL E. HEASTIE
Speaker

THE ASSEMBLY
STATE OF NEW YORK
ALBANY

Room 932
Legislative Office Building
Albany, New York 12248
518-455-3791
FAX: 518-455-5459

1446 East Gun Hill Road
Bronx, New York 10469
718-654-6539
FAX: 718-654-5836

250 Broadway, Suite 2301
New York, New York 10007
212-312-1400
FAX: 212-312-1418

February 23, 2016

Mr. Thomas Sloan, Executive Director
Mid-Hudson Library System
103 Market Street
Poughkeepsie, New York 12601

Dear Mr. Sloan:

I want to express my gratitude for your time and consideration during my visit to the area of Ulster County. My recent tour across the state was an incredible experience, and it will help me in my role as Speaker of the People's House.

We covered a lot of territory and met many wonderful people. In addition to experiencing the natural beauty throughout the state, I encountered many local success stories – small and medium-sized businesses that drive the state's economy. I also learned about the tremendous challenges communities are facing – some different from my home community of the Bronx, but many surprisingly similar. I am eager to put what I have learned to good use during the current session.

Visiting SUNY New Paltz, The Agri-Business Child Development Center, the Maritime Museum and meeting the collective leadership of the Ulster and Northern Dutchess County communities were some of the highlights and gave me the opportunity to experience a sliver of what Ulster and Northern Dutchess County have to offer. Assemblyman Kevin Cahill prepared me well with his insightful knowledge of the region.

Again, thank you for your hospitality and support and I promise you I will work very hard to help your community. Together we can make the Assembly's Family First agenda a reality for all New Yorkers. I truly appreciate your role in making my visit as enlightening as it was enjoyable.

Sincerely,

Carl E. Heastie
Speaker

PULISDO Meeting
October 22, 2015, 10:30 am
Lake Placid, NY

In attendance:

Tim Burke, Eva Jankowski, Brian Hildreth, Eli Guinee, Deb Lewis, Caroline Ashby, Margo Gustina, Sara Dallas, Robert Hubsher, Eric Trahan, Steve Bachman, Patty Uttaro, Tom Sloane, Ron Kirsop, Lauren Moore, Sarah Glogowski, Wanda Bruchis, Merribeth Advocate, Susan Mitchell, Amanda Travis, Maureen O'Connor, Mary Jean Jakobowski, Steve Bolton, Kevin Verbessey, Tom Bindeman

Call to Order

Tim Burke called the meeting to order at 10:30 am.

Treasurer's Report

Kevin Verbessey presented the Treasurer's Report.

Bylaw Revisions

On behalf of the Bylaw Revision Committee, Eli Guinee proposed the following revisions to the Bylaws:

- Updated objectives
- The "Board" will now consist of a representative from each library. The Executive Board is now a committee
- Adds Treasurer as an Officer.
- Phone and online votes are now allowed.
- The Secretary will post minutes of official Board Meetings on PULISDO website.
- Online votes may be called with 1 week notice.
- Annual Dues will be allowed, set by vote at the Annual Meeting.

There was discussion about developing recommended procedures for the posting of minutes to the PULISDO website.

Everyone thanked Eli Guinee and the Bylaw Revision Committee for its excellent work on this ambitious project.

Kevin Verbessey moved to accept the Bylaw revisions. Wanda Bruchis seconded. The motion carried unanimously.

Election of Officers

Tim Burke presented the 2016 slate of officers: Terry Kirchner, President; Tim Burke, Vice President; Kevin Verbessey, Treasurer; Lauren Moore, Secretary.

Sara Dallas moved to accept the slate of officers. Mary Jean Jakobowski seconded. The motion carried unanimously.

Subcommittee Reports

Training and Development Committee

Eli Guinee presented the Training and Development Committee's report. The committee identified the following objective: to design a survey to capture expertise at Systems; and to identify three critical training and development issues. The survey will be distributed to system Directors.

Communication Committee

Brian Hildreth presented the Shared/Common Communication Messages and Strategies Committee's report. The committee has identified as its primary objective to improve communication between the Division of Library Development and PULISDO. The committee is investigating several options to improve communication, including initiating regular in-person meetings with DLD in Albany and communicating PULISDO and DLD's shared values. The committee will develop a proposal for these in-person meetings. The Executive Committee will schedule a meeting with Commissioner Elias and Deputy Commissioner Beth Berlin.

Group Purchases Committee

Grace Riario presented the Group Purchasing Options Committee report. The committee will distribute a survey to clarify the purpose of the committee.

NYLA 125 Campaign Donation from PULISDO

Tim Burke proposed that PULISDO make a donation to NYLA's Capital Campaign.

Robert Hubsher moved to make a \$3,000 donation to NYLA's 125 Capital Campaign. Lauren Moore seconded. The motion carried unanimously.

Other Issues for Discussion

Wanda Bruchis suggested a revision of the Minimum Standards for Public Libraries.

Margo Gustina moved to create an Ad-Hoc Committee to evaluate the Minimum Standards for Public Libraries and make recommendations. Wanda Bruchis seconded.

Amada Travis, Grace Riario, Caroline Ashby, and Mary Jean Jakobowski volunteered to serve on the committee. In accordance with the Bylaws, the President will be asked to establish the ad-hoc committee.

The motion carried unanimously.

Robert Hubsher would like PULISDO to advocate for the exemption of Library Directors from Civil Service requirements.

Report from the State Library

Bernie Margolis and Karen Balsen joined the meeting at 11:45 am.

State Librarian Bernie Margolis shared his vision for the Division of Library Development. This vision includes facilitating collaboration across system types, ensuring equitable library service across the state, promoting digital literacy, and increasing broadband access.

NOVEL databases are DLD's most widely used service.

The Division of Library Development references the Regents Advisory Council's 2020 Vision Plan and the LSTA document to guide its actions and frame its decision making.

The Governor's Broadband Office has posted an RFI for a broadband project. \$50M of the \$500M set aside by the Governor's office for broadband development has been reserved for digital literacy training.

Mr. Margolis supports PULISDO's intention to meet with Commissioner Elia.

New Trustee Handbook

Jerry Nichols, Rebekkah Smith Aldrich, Roger Reyes, and Tim Gavin joined the meeting at 12:00 pm.

PULISDO acknowledged and thanked Jerry Nichols and Rebekkah Smith Aldrich for their outstanding work on the new Trustee Handbook. New York's library community is fortunate to have Mr. Nichols and Ms. Smith Aldrich working on its behalf. They are library heroes.

Jerry thanked Rebekkah Smith Aldrich for contributing content, perspective and, a "breath of fresh air" and Andy Mace at DLD for contributing technical expertise to the project. Jerry also remembered Malcom Hill for initiating the project many years ago.

The meeting was adjourned at 12:09 pm.

Respectfully submitted,

Lauren Moore
Secretary

Rebekkah Smith Aldrich on a Standard Trustee Curriculum

Rebekkah Smith Aldrich, a public library development consultant since 1998, has worked extensively with library boards and trustees and is coauthor of the *Handbook for Library Trustees of New York State*. In this week's Trustees' Corner, Aldrich talked to *Hotline* about the work that went into her newest project, a standard trustee education curriculum. Next week, she'll discuss the 2015 edition of the *Handbook* and the state of trustee education as a whole.

Can you talk a bit about how you got started with the trustee education curriculum project?

The New York State Library (NYSL) offered the ILEAD USA program for the first time in 2015—a nationwide leadership immersion program utilizing web technologies [whereby] participants work in teams to address an identified community need and are assisted by mentors/instructors in developing a successful project. The Public Library System Directors Organization of New York State (PULISDO) put together a team to work on the development of a standardized framework for a trustee education curriculum. I stepped in as the "mentor" but truly colead the group with my teammates Lisa Erickson, Jennifer Ferris, Ron Kirsop, Grace Riaro, and Amanda Travis.

We developed a survey that went out to all library trustees, directors, and public library system staff. We had a goal to reach five percent of the 6,000-plus trustees in the state and ended up with input from over 13 percent. This helped us develop a model for how to break up content from the 2015 edition of the *Handbook* into useful curriculum modules and also directed how training would be delivered. Among trustees, there was a clear preference for in-person, shorter (two-hour) educational opportunities. Among directors, there was a preference for short, online webinar-style educational opportunities for trustees. Plans are in the works to satisfy both audiences. In fact, *Handbook* coauthor Gerald Nichols of the Palmer School of Library and Information Science, Long Island University, Greenvale, NY, has already recorded some amazing one-hour webinars archived on the state library's website (ow.ly/ULZG8). We plan to supplement his work with 15-minute introductory recordings that are companions to each chapter of the new *Handbook*.

To test the curriculum we will be working with PULISDO, the Library Trustee Association of New York State, NYSL, and the New York

Library Association (NYLA)—all of which agreed to be partners in our project back in March 2015. We'll then convene a train-the-trainer cohort of fellow system staff members to create a culture of trustee education delivered throughout the state.

What are the benefits to having trustees follow an organized curriculum, as opposed to operating on goodwill?

No one is born knowing how to be a public library trustee. Trustees are expected to govern libraries in accordance with state and federal law and regulations. There is increasing regulatory oversight of libraries here in New York. We need to give trustees a fighting chance; they deserve basic, introductory information delivered in a style that meets their needs so they can do their best on behalf of the communities they serve and protect and grow public libraries to meet the needs of New Yorkers for years to come.

Do you run into trustees who are resistant to instruction?

No. Perhaps because those who are resistant avoid meeting me! I've helped to educate over 1,000 trustees in the Mid-Hudson Library System over the years in formal education sessions; I make close to 100 library board visits a year—and people are happy to see me. They have questions, they want to do things right, they want to know what best practice is. Some may like to debate the finer points of New York State law with me, but it's all for the good of the library. Public library trustees are some of the most amazing people I've ever met... These volunteers are bold, smart, and community minded.

If a board is concerned about resistance to trustee education we coach them to institute a culture of learning on the board. More senior trustees lead the way; they'll often attend Trustee Essentials education sessions with new trustees [and] will create a budget line to support trustee education. We've also been talking about creating a continuing education policy for trustees that would set expectations at a library for trustees to pursue education. And of course there is the perennial discussion at the state level to mandate trustee education, but we all know what really works is self-motivated learning—so that's what we focus on locally.

Rebekkah Smith Aldrich is the founder of Sustainable Libraries, LLC, and coordinator for library sustainability at New York's Mid-Hudson Library System, Poughkeepsie, as well as a 2010 Library Journal Mover & Shaker.



Rebekkah Smith Aldrich on the 2015 NYS Trustees' Handbook

Last week in *Hotline*, Rebekkah Smith Aldrich discussed her recent project, a standard trustee education curriculum. This week she talks about the work that has gone into the 2015 edition of the *Handbook for Library Trustees of New York State*, which she coauthored with Gerald Nichols of the Palmer School of Library and Information Science, Long Island University, Brookville, NY, and what—in her opinion—trustees need to know.

What was the process of putting together the Handbook like? What's changed during the time that you've been working with trustees?

This latest revision of the *Handbook* is a continuation of a decades-long effort to provide library trustees with a readable and concise reference to assist them in the performance of their duties. In this edition we have strengthened those areas of the *Handbook* that generated the most interest these past five years. My coauthor, Jerry Nichols, has been the steward of this essential resource, referred to as the "Trustee Bible" here in New York, for many years. I was honored to be invited to help him with this new edition. Jerry and I had a lot of fun finding all of the changes in law and regulation, acknowledging evolution in the areas of technology, advocacy, and public relations, but the core message remains the same—public library trustees are local heroes. They step up to serve and deserve support and assistance.

What are some of the most important things trustees need to know that they usually don't?

I see a lot of confusion around the board-director relationship. The board governs, the director manages—day-to-day that is very clear (I've included a breakdown of what that looks like in the *Handbook for New Library Directors in New York State*, p. 32–35; ow.ly/UZv2w). However, where the challenge lies is that a board has the authority to hire, evaluate, and fire a director, which lends itself to feeling like a traditional hierarchical management relationship when it is not. The board and director are partners in leading the library forward; striking the right tone and balance in that relationship is critical.

Other areas I've found that are consistently necessary to discuss with newer trustees are internal financial controls and financial planning; best practices for board meetings in the Open Meetings Law environment; confidentiality of patron records; and stewardship of the library's physical infrastructure.

How has your work with New York State's Mid-Hudson Library System (MHLS) informed your approach to trustee education?

MHLS has been doing basic trustee education for close to a decade. My former executive director, Josh Cohen, helped us take an iterative approach to the curriculum so that we fine-tune it each year based on trustee reactions to content and shifting regulatory issues. That pattern of continuous improvement has served us well. I've also learned how to present information in a way that is thorough yet not overwhelming. We don't want to scare trustees away, but we do need to impart the importance of many of the issues trustees have to deal with. That needs to be a careful balance.

We're always careful to stress that no question is too basic and that they can ask the same question more than once in their tenure. We'd much rather they feel comfortable contacting us throughout their term of service rather than wasting a bunch of time researching something on their own or relying on a perception of an answer rather than the facts. We view our relationship with our member libraries as a partnership and strive to support trustees far beyond

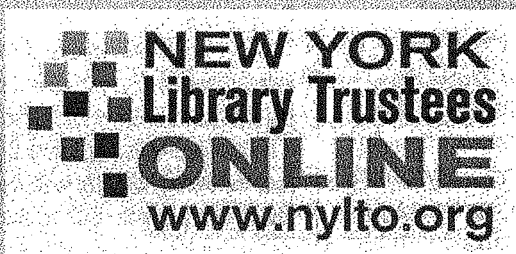
our initial education sessions with them.

The Public Library System Directors Organization of New York State (PULISDO) has created New York Library Trustees Online (NYLTO; www.nyto.org),

which is an online forum for all library trustees in New York to talk to each other and receive technical assistance from system staff throughout the state. We were lucky enough to have the legendary Sandra Nelson help get this project started, so that was pretty cool!

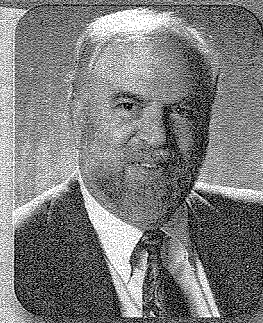
(Part 1 of this Trustees' Corner conversation ran in the November 23, 2015, issue of *Library Hotline*.)

Rebekkah Smith Aldrich is the founder of Sustainable Libraries, LLC, and coordinator for library sustainability at New York's Mid-Hudson Library System, Poughkeepsie, as well as a 2010 Library Journal Mover & Shaker.



News from the *State Librarian*

**From the Desk of Bernard A. Margolis,
New York State Librarian and Assistant Commissioner for Libraries**



Its 2016 and New York's libraries are thriving! New York State had more of *America's Star Libraries* in 2015 than any other State in the nation. People ask me, in my role as your State Librarian, what is New York's recipe for success? Can you guess my response? "An effective board of trustees is the key ingredient to any public library's success." I am pleased to report, that now, more than ever, there are opportunities and resources for all of New York's public library trustees to refine their skills as leaders in our libraries and communities.

No individual is naturally equipped to act as a trustee. All trustees, new and experienced, benefit from ongoing guidance, up-to-date information and practical advice. To assist library trustees in steering libraries in the right direction, while navigating complex societal, legislative and regulatory changes, the State Library continues to collaborate with experts in the library community in order to provide the best information resources for trustees. Foremost among those resources is the 2015 edition of the *Handbook for Library Trustees of New York State*.

Other resources include a series of informative and engaging trustee webinars presented by *Handbook* co-author Jerry Nichols, LTA's various services and programs including LTA's Annual Trustee Institute, NYLTO (New York Library Trustees Online) and the promising preliminary work of the ILEAD USA NY *Helping All Trustees Succeed* (HATS) Team.

Handbook for Library Trustees of New York State - A Must Read!

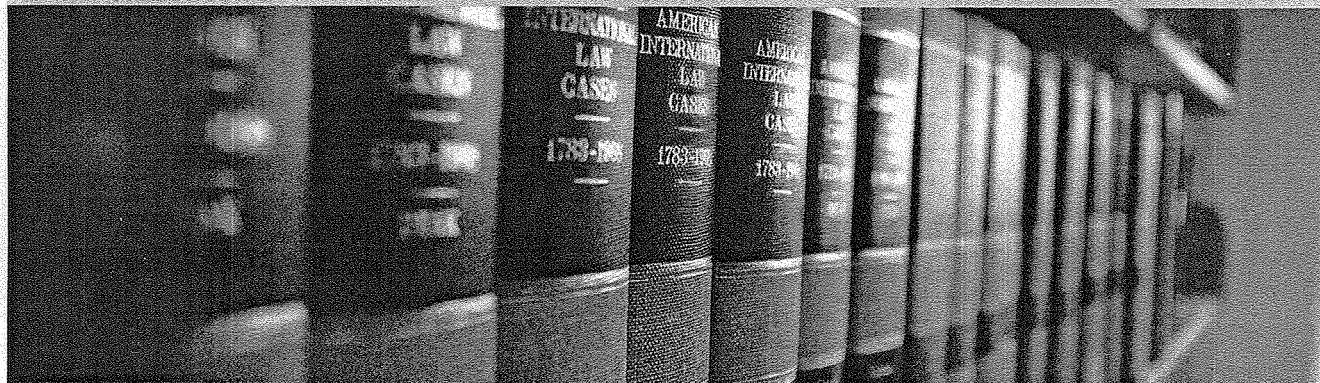
As State Librarian, I cannot thank the co-authors enough for providing this key resource to New York's library community. I strongly recommend that every trustee read and use the *Handbook*. Co-authors Jerry

Nichols and Rebekkah Smith Aldrich deliver sound guidance, up-to-date information and practical advice to help trustees make those critically important policy, personnel, and financial decisions. The 2015 edition represents the combined efforts of dozens of individuals and organizations who are devoted to providing an invaluable, relevant, and current tool for trustees. The updated edition of the *Handbook* is now freely available online at

www.nysl.nysed.gov/libdev/trustees/handbook/index.html. Information about how to obtain print copies is also posted on the State Library's website.

ILEAD USA and *Helping All Trustees Succeed* (HATS) - *Awesome Ideas for Trustee Education*

During 2015, the New York State Library's ILEAD USA project supported the ongoing work and professional development of eight project teams composed of library staff from all types of libraries. One of the teams, the public library systems' *Helping All Trustees Succeed* (HATS) Team worked with their mentor, Rebekkah Smith Aldrich to develop a "standardized framework for a trustee education curriculum." The curriculum modules, based on the *Handbook*, will be tested during 2016 by several partner organizations, including LTA. A train-the-trainer cohort of system staff will work with the HATS Team and partner organizations "to create a culture of trustee education delivered throughout New York State." The November 23rd and 30th issues of *Library Hotline* feature two interviews with Rebekkah that provide additional insight for library directors and trustees about what the HATS Team is up to, about the *Handbook* and about trustee education in general. A worthwhile read to kick off the New Year! Enjoy! 

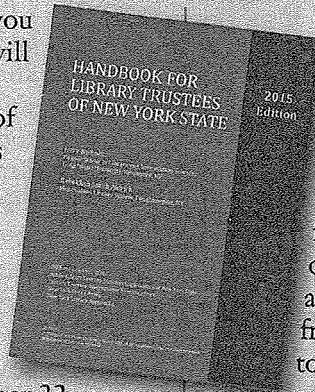


Unveiling of the 2015 Edition of the Handbook for Library Trustees

Have you received your copy? If not, you can contact your library director who will get in touch with your library system. Meanwhile, you can visit the Division of Library Development website, or LTA's website — which provides a PDF of version of the handbook and a link to an online version right from our homepage (www.librarytrustees.org)

The 2015 edition of the handbook was officially “unveiled” during a ceremony held at Lake Placid on October 22. Authors Jerry Nichols (Palmer School of Library and Information Sciences) and Rebekkah Smith Aldrich (Coordinator for Library Sustainability, Mid-Hudson Library System) explained some of the new additions, announced the official release of the hard copies of the new edition, and thanked the many who contributed to the development of the latest version. LTA is proud to be among those who were asked to contribute, and we thank the many LTA members who relayed their ideas and suggestions. Your thoughts were shared and incorporated by Jerry and Rebekkah.

The 2015 Edition is much more detailed, covers the newest trends and developments in library information and law, and is designed for the digital age. Along with the regular content, the online version is indexed, searchable, and provides the reader with many helpful links and resources.



There was great excitement surrounding the unveiling of the handbook. We believe strongly that you will feel that same sense of enthusiasm once you take a peak.

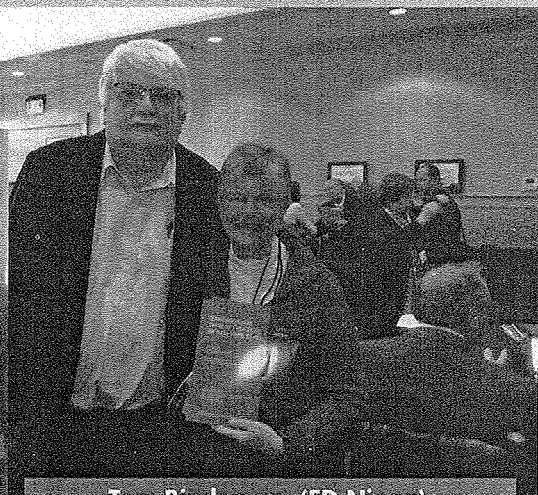
LTA will continue to use the handbook as a framework through which we will provide our members with educational resources and guidance. Please read the handbook from front to back, and then over again. Get to know the handbook inside and out. Read sections at board meetings. Discuss issues and questions with your fellow LTA members. And as you read the handbook, please continue to let us know which services you would like LTA to expand upon and which tools and resources you feel would further your success as a trustee.

This handbook provides you with a solid foundation from which you can continue to grow. Becoming well versed with its information will make your job as a library steward **much** easier. Whether you are a brand new trustee or have served for 20 years, the 2015 edition of this handbook is an **essential** read.

Jerry and Rebekkah, thank you for your diligence, partnership, and all of the hard work you put into the development of this latest edition! **LTA**



Jerry Nichols, Martha Anderson, Tim Gavin, Rebekkah Smith Aldrich, Tim Burke (ED UHLS), Jean Currie, Bernard Margolis (State Librarian)



Tom Bindeman, (ED Nioga) with Jean Currie of LTA

Rebekah-

On behalf of the Board & Trustees,
Thank you! for your presentation
at the January trustee meeting.

Continue the good work.

Tom

Rebekkah Smith Aldrich

From: Patti Haar <phaar@pattersonlibrary.org>
Sent: Tuesday, February 23, 2016 8:36 AM
To: Rebekkah Smith Aldrich
Subject: Thank you

Hi Rebekkah,

Thank you for your time and counsel yesterday. It was so good of you to listen to us for hours! And sharing your wealth of knowledge was helpful, as always!

All best,
Patti

Sent from my iPad

Rebekkah Smith Aldrich
Coordinator for Library Sustainability
Mid-Hudson Library System
103 Market Street
Poughkeepsie, N.Y. 12601

Dear Rebekkah,

On behalf of the Friends of the PPLD
thank you for allowing us to host the Friends
Support Group Meeting on Thursday, February
18, 2016. Those on the panel expressed
appreciation for your leadership of the
discussion and lite dinner. Your actions made
the evening a great success.

Throughout the planning process you were
a pleasure to work with and solve
potential problems. You easily adapted
to any changes made necessary by the

layout of the book store. As you greeted
everyone at the meeting, your warm
personality made each feel welcomed
and valuable to the workshop.

Thank you again for all you did for
us.

Sincerely,

Liz Murphy

1st Vice President, Friends of PPLD

Rebekkah Smith Aldrich

From: Patricia Placona <patplacona@gmail.com>
Sent: Thursday, March 03, 2016 7:02 PM
To: Rebekkah Smith Aldrich
Subject: Advocacy Day

Just a note to congratulate you on a tremendous day yesterday. I hope you are pleased with the turn out. Can't imagine the work that went into such a big event. Thanks for all of your hard work on behalf of all of us.

Pat
PATRICIA PLACONA

Kerstin Cruger,
Marketing and Program Assistant
Mid-Hudson Library System
103 Market Street
Poughkeepsie, N.Y. 12601

Dear Kerstin,

On behalf of the Friends of PPLD thank you for allowing us to host the Friends Support Group meeting on Thursday, February 18, 2016. Those on the panel expressed appreciation for your leadership of the discussion and like dinner. Your actions made the evening a great success.

Throughout the planning process you were a pleasure to work with and solve potential problems. You easily

adapted to any changes made necessary by the layout of the book store. As you greeted everyone at the meeting, your warm personality made each feel welcomed and valuable to the workshop.

Thank you again for all you did for us.

Sincerely,
Liz Murphy
1st Vice President, Friends of PPLD.