



Conducted LIVE and ONLINE, Saturday, March 7, 2026

Session recordings available 90 days beginning Monday, March 10, 2026

9:30 a.m. – 10:30 a.m. Sessions

Friends: The Basics

Sue Miller, *Executive Secretary, PCBL*

Brandt Ensor, *Treasurer, PCBL*

Susan Tracey, *President, PCBL*

While there are many resources for Pennsylvania Libraries to turn to for assistance in managing a library, there are very few resources for Friends Groups. It can be confusing knowing what to do in some fundraising situations, or just in management of the group itself. In this session, we plan to go over the basics - questions most frequently asked by Friends Groups across the state. Some topics include special occasion permits, gaming licenses, when to charge sales tax, memorandums of understanding, and more.

Expected Takeaways:

- *Friends members should take-away instructions of what they need to do for certain circumstances and where they can turn for help.*
- *Trustees who are involved with their library's Friends will have a greater understanding of the work necessary to their group to succeed.*

The 70% Leap: A Blueprint for Transformative Library Advocacy

Kelly Richards, *President and Director, Free Library of Philadelphia*

Folasade Olanipekun-Lewis, *Chair, Free Library of Philadelphia Board of Trustees*

Addressing the complex needs of an urban public library requires more than isolated efforts from individuals or single organizations. This presentation will examine how effective collaboration and communication among the Free Library of Philadelphia, its Board of Trustees, and a diverse array of

stakeholders—including the Mayor’s Office, Philadelphia City Council, community leaders, and residents—have led to more responsive, impactful, and sustainable library services. Drawing on the collaborative partnership between Folasade Olanipekun-Lewis, Chair of the Board of Trustees, and Kelly Richards, President and Director of the Free Library, we will explore the processes and principles that have enabled the Free Library to thrive in a challenging environment. Our discussion will focus on:

- **Governance:** How clear roles, shared vision, and transparent decision-making foster trust and accountability among library leadership and stakeholders.
- **Inclusive Planning:** Strategies for engaging community voices and ensuring that library initiatives reflect the needs and aspirations of diverse populations.
- **Data-Driven Decision-Making:** The importance of using evidence and community feedback to guide priorities, measure impact, and adapt to changing circumstances.
- **Mutual Accountability:** Building a culture where all partners—library staff, trustees, city officials, and community members—share responsibility for outcomes and celebrate collective successes.

Expected Takeaways:

- *We will highlight both the opportunities and challenges inherent in stakeholder collaboration, offering practical strategies for building trust, aligning goals, and sustaining joint efforts over time.*
- *Attendees will leave with actionable insights and tools to strengthen advocacy, enhance service delivery, and promote long-term community well-being through integrated approaches.*

Next Chapter Leadership: Effective Succession Planning for Library Board Members and Directors

Debra Thompson, *President, Strategy Solutions, Inc.*

Jacqui Catrabone, *Director, Nonprofit & Community Services, Strategy Solutions*

Libraries should have emergency and long-term succession plans for both board and staff leaders, yet many don’t have formal processes to recruit and train board members and only think about succession when a director’s retirement is eminent. This highly interactive session, based on the Standards for Excellence,[®] outlines the key elements of leadership succession at both the board and staff level and equips participants to think through the process of managing succession, whether planning for an upcoming retirement or responding to an emergency. Participants learn how to think through the process of equipping board members to take on leadership roles and how to establish a board leadership succession process. The role of the board in executive leadership transition is also discussed, including how to manage Director succession if and when it occurs.

Participants also learn how to effectively manage emergency and long-term succession at the staff level. This is accomplished by outlining the knowledge, skills and abilities required for each role that can be built into employee development and cross-training plans. The importance of developing a desk manual (a “how to” guide in the event of an emergency) is also discussed. Tools and templates are provided that can be implemented in your library.

Expected Takeaways:

- *Educate participants on the key elements of board governance and succession planning for the board, the Director and key roles in the library and utilize the provided tools and templates to support board and staff succession.*
- *Learn how to strategically recruit and equip the “right” board members to lead and support your library.*
- *Understand the key elements of Director succession and put the appropriate policies in place to effectively manage the process; learn how to unpack staff job descriptions into their “functional parts” so that others can be cross trained to perform roles in the event of an emergency.*

10:45 a.m. – 11:45 a.m. Sessions

The Updated Board Trustee Manual: Strengthening Governance & Support for Library Trustees

Bri Crum, *Operations and Relationships Advisor, Bureau of Library Development*

Learn about the newly revamped Board Trustee Manual and how it can be used to effectively support board governance. This session will provide a brief history of the manual, explain the need for its update, and outline the collaborative process behind its redesign. Attendees will also learn how to access the manual and explore key topics that are most relevant to them.

Expected Takeaways:

- *Gain a clear understanding of the purpose of the Trustee Manual.*
- *Obtain insight into how the resource was developed.*
- *Receive practical guidance on effectively navigating and using the manual to support board service and strengthen libraries.*

Stop Throwing Words At The Wall: Say Less, Make It Stick

Lisa Schaefer, *Owner, RealTalk Strategies*

Just because you say it doesn’t mean people remember it—or interpret it as you intended. This session gives practical strategies on how to say less, engage more and craft messages that stick. Learn how to distill complex issues and engage residents, media and staff, so your audience remembers what you actually want them to.

Expected Takeaways:

- *Identify key techniques for creating clear, memorable messages.*
- *Practice turning complex topics into understandable communication.*
- *Craft and tailor messages that stick with residents, staff, and media.*

From Vacancy to Visionary: Hiring Your Next Library Leader

Maryam Phillips, *Executive Director, Hosting Solutions and Library Consulting*

Hiring a new library director is one of the most important decisions your board can make. How can you confidently determine the right person for the job? What are the key attributes needed in your next library leader? This session will walk you through the recruitment and hiring process for library director candidates, while aligning the process with your library's mission, values, and long-term goals.

Expected Takeaways:

- *How to define the qualifications and leadership qualities your library needs.*
- *Best practices for interviewing, reference checking, and evaluating candidates.*
- *Strategies for successful onboarding and supporting your new director.*

11:45 a.m. – 12:30 p.m.

Lunch Break

12:30 p.m. – 1:30 p.m. Sessions

Book Sales for Vintage Books

Susan Tracey, *Volunteer, Friends of the Mt Lebanon Public Library*

Jean Crawford, *Volunteer, Friends of the Mt Lebanon Public Library*

Selling Vintage Books is different from Mainstream Book sales. This session will be a concentrated review of the process of making the most of the donation by turning it into a successful sale.

Expected Takeaways:

Learn how to...

- *Determine authentic value*
- *Contact your buyers and dealers*
- *Market the sale*
- *Make the most of the space you have*
- *Explore various approaches, timing, auctions, and more.*

“Do We Need a Lawyer for This?” HR and Compliance Decisions That Shouldn’t Wait

Matt Jandrisavitz, *Attorney, RC Kelly Law Associates*

Rich Kelly, *Attorney, RC Kelly Law Associates*

Not every HR issue requires a lawyer—but missing the moment when it does can be costly. This session helps Library leaders recognize the legal red flags that demand immediate attention. Through real-world examples, we’ll explore high-risk situations, compliance pitfalls, and best practices for involving legal counsel at the right time to safeguard both employees and the organization.

Expected Takeaways:

- *Spot the HR issues that shouldn’t be handled without legal input.*
- *Decide when a situation is serious enough to escalate.*
- *Know what information to gather before calling legal.*

Libraries and AI: An Opportunity for Exploration and Collaboration

Sylvia Orner, *Collections and Resource Management Librarian, University of Scranton - Weinberg Memorial Library*

Kate Cummings, *Research and Instruction Librarian for Business, University of Scranton - Weinberg Memorial Library*

Generative AI is everywhere, and it can be overwhelming. Maybe you've dabbled with it, maybe you haven't, but in either case this session is for you! We will discuss what generative AI is and is not as well as how to successfully leverage AI tools while avoiding common pitfalls.

Expected Takeaways:

- *Attendees will learn the what generative AI is, how it can assist in day-to-day tasks, and what its limitations are.*
- *They will learn about several popular generative AI tools and how to effectively use them.*

1:35 p.m. – 2:00 p.m.

Un-Conference Discussion/Q&A

Facilitated open discussion and opportunity to connect with presenters and other attendees to ask questions, discuss take-aways and next steps.