



**Pennsylvania
Citizens for
Better Libraries**



**Pennsylvania
Library
Association**

2025 Friends & Trustees Institute

Event Schedule

***All sessions will be conducted live, Saturday, March 15
with recordings available March 20 – June 20***

9:00 a.m. – 9:30 a.m.

Log-in and Prep

Attendees log-in to the virtual event platform (Pheedloop), create a profile and upload a photo (optional), post comments in the virtual lobby and get ready to engage!**9:15 AM - 9:25 AM**

Welcome

9:30 AM - 10:30 AM

Grown-Up Storytime: Engaging Community Leaders

Ryan McCrory, Director, Dauphin County Library System

Conversational lecture about engaging your community leaders, be they borough council, chamber of commerce members, or other organizations. We will walk through the steps of defining your story, finding your facts, and crafting the message.

Speaker Bio: *Ryan McCrory has 25 years experience in the field, the last 6 of which has been as a director here in PA. He oversaw municipal increases, greater donor engagement, and a heightened recognition of the library in his time as director at Lititz Public Library before moving on to Dauphin County Library System.*

Understanding the Right-to-Know Law and Sunshine Act's Relevance to Libraries

Liz Wagenseller, Executive Director, Pennsylvania Office of Open Records

This session will explore the factors that determine whether a library is subject to the Right-to-Know Law (RTKL) and the Sunshine Act, and the policies and procedures it must follow under these laws. It will provide a concise overview of the RTKL's record request and appeal process, identifying which records are subject to the RTKL and which are considered public, along with a parallel discussion on conducting meetings in compliance with the Sunshine Act. While these laws may not apply to all libraries, the session will emphasize the importance of record management and public meetings for private institutions and organizations seeking to maintain transparency and accountability with their customers/constituents.

Participants will receive valuable insights, tips, and best practices. There will also be opportunities for participants to ask questions during and after the session.

Speaker Bio: *Liz Wagenseller began serving a six-year term as Executive Director of the Pennsylvania Office of Open Records (OOR) in January 2021. She leads all aspects of the independent, quasi-judicial agency that decides appeals of denied requests for records under the Right-to-Know Law (RTKL). The RTKL works to provide fair and legal access to local and state government records.*

Keystone Grant for Library Facility Improvements

Ed Lupico, Keystone Grant and Library Facilities Advisor, Office of Commonwealth Libraries

This session will provide a basic introduction to the Keystone Grants for Public Library Facilities program. This competitive grant program is the only PA state funding specifically for public library building improvements. Attendees will learn how the program operates, including what types of projects are eligible, how the application process works, and what a standard grant cycle looks like. The goal of this session is for attendees to understand how a planned capital project can work with the program, or how to plan a project which may qualify for program funding.

Speaker Bio: *Ed Lupico is a librarian with a background in public libraries. He has been the Keystone Grant program administrator for eight years. A cornerstone of his work is providing information and education about this grant and its application to Pennsylvania libraries and municipalities.*

10:30 AM - 10:45 AM

Break

10:45 AM - 11:45 AM

"Corporate Giving: Positioning Your Library as the Charity of Choice"

Chris Crytzer, Founder & Principal, Crytzer Communication

Tapping into Corporate Giving and Positioning Your Library as the Charity of Choice: Unlock the potential of corporate giving to elevate your library's impact. This session will guide you through strategies to position your library as the "Charity of Choice" for businesses, while uncovering hidden treasures in corporate funding. Explore innovative avenues, such as community champion programs and give-back initiatives, as well as often-overlooked donation matching opportunities. Gain insights into lesser-known corporate funding opportunities, from trade show proceeds to leveraging your personal and professional networks. Discover time-saving strategies, including tips for utilizing AI tools like ChatGPT and the importance of effective follow-ups to maximize your success. Whether you're seeking practical tools or fresh inspiration, this session is your roadmap to a thriving corporate giving program.

Speaker Bio: *Chris Crytzer, a Certified Fund Raising Executive (CFRE) and registered fundraising consultant with Pennsylvania's Bureau of Corporations and Charitable Organizations. Chris has built a consulting business by developing customized fundraising strategies that include planning activities, implementation and staff training and has successfully raised millions of dollars for nonprofit organizations through diverse fundraising initiatives. With a proven track record in securing corporate, foundation and government grants, she is passionate about empowering nonprofits to achieve their missions and thrive. Chris earned a*

bachelor's degree in communication arts from Grove City College and a master's degree in corporate communication from Duquesne University.

Building and Sustaining Successful Libraries - a Commonwealth Perspective

Susan Banks, Deputy Secretary for Libraries, Office of Commonwealth Libraries

Heather Sharpe, Director of Library Development

The Role of the Board and the Friends is central to the success of a library, its Director and staff leadership. Those contributions also ensure the library's secure place in the community. State Librarian Susan Banks and Director of Library Development Heather Sharpe will share how the library statute and regulations can help show the way and share practicalities of those relationships they learned over years of leading public libraries and library services in their communities.

Speaker Bio: *Susan and Heather presented together on the proposed regulations and the process associated with their passage at last year's PCBL Institute.*

Meetings That Matter: Driving Results, Not Just Discussions

Maryam Phillips, Executive Director, Hosting Solutions and Library Consulting (HSLC)

Tired of board meetings that go off track? Are your meetings too short? Too long? This session will show you how to run focused, efficient board meetings that drive action and produce results. Learn how to prepare for, organize, and run board meetings that keep your trustees engaged and your library moving forward.

Speaker Bio: *Maryam Phillips holds a Masters Degree in Library Science from Drexel University and has served as Executive Director for Hosting Solutions and Library Consulting (HSLC) for eleven years, with over 40 years of experience in public library and non-profit administration. She began her career as a library page, and has served as a Library Director, Assistant Director and Director for the Lower Merion Library System. She also served as System Administrator for the Montgomery County Library and Information Network for fourteen years prior to joining HSLC. In addition to her work in the library profession, she serves on community boards that focus on senior housing, youth initiatives, and police and community relations. [https://www.linkedin.com/in/maryam-walker-phillips-59230968]*

11:45 AM - 12:30 PM

Lunch Break

12:30 PM - 1:30 PM

Easy Advocacy All Year Long

Christi Buker, Executive Director, Pennsylvania Library Association

Promoting the great work of libraries shouldn't be hard. Yet, many shy away from engaging elected officials at the local and state levels. This session will help attendees take existing talking points for advocacy and make them specific to their library. With a little practice researching the participants before an advocacy appointment, you can provide useful information and ideas for elected officials and connect libraries with influential legislators. Library workers will connect on a common area and then expand into both the

positives and challenges facing the library. Finally, by using calendars, newsletters, and celebration days throughout the year, a schedule of opportunities to engage will be developed.

Speaker Bio: *Christi is the executive director of the Pennsylvania Library Association since 2016. She is the registered lobbying principal on behalf of the Association at the state level, and engages in state and federal levels of advocacy for members.*

New PA Dept of State Reporting Requirements and Other Legal issues

Vicky Ann Trimmer, Esq., CPA, Daley Zucker, LLC

We will review the new Pennsylvania Dept. of State annual filing requirement including showing a completed filing. We will also discuss other legal issues that impact a Library organization such as conflict of interest, decision making red flags, responsibilities as a member of the Board of Directors/Trustees.

Speaker Bio: *Vicky Ann Trimmer has been practicing law and representing non-profit organizations for 35+ years.*

Protecting your hard-earned funds from fraud

Jennifer Hisdorf, VP of Treasury Management, Brentwood Bank

This informative discussion about financial habits that can take your organization to the next level. You will learn: Cash flow Planning for the unexpected Financial policies Security and fraud prevention Unique financial requirements for non-profit What are the best practices to keep the organization on track?

Speaker Bio: *Jennifer Hisdorf, VP of Treasury Management at Brentwood Bank They say do what you love, and you'll never work a day in your life. Jennifer lives up to that maxim. She's the type of person you want on your side: one who will transform challenges into success. Jennifer firmly believes that relationships are the foundation of everything Brentwood Bank does for customers. And once she gets to know you, she'll have a better understanding of exactly how she can help achieve your goals. As a board member for several non-profit organizations, Jennifer has the ability to speak as a banking professional but also as a representative of the organization and share important financial information to protect funds while developing a growth strategy plan. Jennifer has presented on security and fraud risk mitigation to over 50 entities including government, non-profit, for profit and general security and fraud prevention sessions.*

1:30 PM - 1:45 PM

Break

1:45 PM - 2:15 PM

Un-Conference Discussion/Q&A

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

