

## Introduction

Good evening.

I am Alice Levine and I reside at 42 Chanticleer Rd.

I am the President of the Friends of the Goodnow Library and I am accompanied by the Executive Board: Claudia Brandon, Lisa Cornacchia, Laura Dowling, Maria Dawson, Susan Pettit, Barbara Cook and Pat Scott.

However, the Friends of the Goodnow Library is not solely composed of its Executive Board but of the hundreds of families who have chosen to join and continued to support the Friends over the years in order to become engaged with the Goodnow Library.

We represent not only ourselves, but our members who are also your neighbors.

Thank you for the invitation to speak to you tonight.

We are glad that you have characterized this meeting as a listening session and that you will listen to what we have to say.

Our goal tonight is to present a proposal of steps to be taken to restore relationships between the Friends and the Library and to reassert the good reputation of the Friends.

Context will be the heart of our presentation and the proposal to follow. You will hear from several of our board members, but their thoughts represent the entire board. For your convenience, we will submit our statements and supporting correspondence to be included for your minutes at the end of our presentation.

We ask that you withhold all comments and questions until we complete our presentation.

At your November 1<sup>st</sup> Trustee meeting, it was reported that the Friends were issued an invitation to come to a Trustee meeting, but had not responded. As you can see from the e-mails that we previously sent you, the Friends replied immediately and positively and selected one of the three suggested dates.

I only point this out to highlight how incomplete and mischaracterized verbal or written information can so easily color the thinking of those hearing or reading it.

Examples of this exact point are found in correspondence regarding the Friends, the Foundation and the Trustees. The correspondence that we have compiled is public information and was acquired through the Freedom of Information Act. This correspondence clearly shows what happened to the Friends, how it happened and why it happened. The correspondence outlines

a road map of what went wrong, but also a road map for corrections to be made in the future in order to create a smooth and collaborative functioning team of the Trustees, the Friends and the Foundation.

At the end of our presentation, we will be passing out packets with some of this correspondence to help you better understand the discrepancies which brought us to this point. The initial packet addresses the complaint against the Friends related to the Lois Lowry fundraiser. It was this complaint that directly led to the downward spiral in our relationship with the Trustees.

The Friends feel as a board and individually that we have been seriously misrepresented to the Trustees and the public. At the time of the January 2021 Trustee meeting, we were truly disappointed that, as volunteers, residents and taxpayers, we were summarily thrown out of our own library by our neighbors.

Moving forward, it will take time and thought, but we believe that the effort we make to work together to reestablish a strong working relationship will be worth it and a benefit to the town of Sudbury.

Please give your attention to our next speaker, Laura Dowling.

## Lowry and Middlesex Bank Incidents

This packet of documents relates to a complaint by the Foundation to the Trustees. It shows the attitude of certain members of the Foundation staff in two situations. The first relates to the Lois Lowry fundraiser sponsored by the Foundation and the Gifts of Hope. The second incident relates to an unsolicited grant to the Friends by the Middlesex Savings Charitable Foundation. These incidents take place less than two weeks prior to a complaint by the Foundation to the Trustees, and the complaint starts the downward spiral in the relationship between the Friends and the Trustees.

In September, 2018, the Gifts of Hope contacted the Foundation and offered to partner with the Foundation in a fundraising event with Lois Lowry, a well-known children's author, to be held at the library in April, 2019. The Friends were never informed about the fundraising plan. (see Lowry 1).

In January, 2019, the Gifts of Hope learned from Karen Cohen, a Board member, that the library had a policy that admission fees could not be charged for events taking place at the library during normal library operating hours. She learned this in a conversation with a personal friend, Susan Petit, who is the Vice President of the Friends and was unaware that the event was to take place at the same time, in the same room, as the Friends three-day Annual Book and Bake Sale. Holly Bernene, President of the Foundation, complains to Esme Green that the Friends are interfering with the Lois Lowry fundraiser. Esme's response is one of bewilderment. (see Lowry 2)

Holly responds to Colleen Keelan of the Gifts of Hope confirming that an admission fee cannot be charged if the Lois Lowry program is held at the Library during public hours. (see Lowry 3)

Colleen responds to Holly that there must be an admission fee for the Lowry event and Sam Greenfield, Development Director of the Foundation, reaches out to Esme Green reminding her that they did discuss charging admission to the Lowry event and that Esme had not been concerned about the Friends reaction to the event. (See Lowry 4)

Esme confirms that there cannot be an admission fee for the Lowry event during public hours, and assumes that the Friends would not have been affected because the Friends' event was to take place the week before. Esme's assumption is incorrect since the date of both events is the same. (see Lowry 5)

This incident leads to the Foundation complaining initially to the Trustees' Chair and then to the Board as a whole about the Friends' speaking negatively about the Foundation. (see Lowry 6 and Lowry 7) While the complaint is not specific, the minutes of the Foundation's January 22, 2019 make it clear that the complaint relates to the Lowry event. (see Lowry 8)

As a result of Susan's warning to her friend, the Lowry event was moved to the Noyes School and was successful. (see Lowry 9)

Also in January, 2019, and at about the same time as the email correspondence relating to the Lowry fundraiser, the Friends were notified that they were to receive an unsolicited grant of \$15,000 from the Middlesex Savings Charitable Foundation, an affiliate of the Middlesex Savings Bank. Sam Greenfield

Lowry 1

**From:** [redacted]  
**To:** [redacted]  
**Cc:** [redacted]  
**Subject:** Re: Lois Lowry Co-Sponsored Event Opportunity - Reaching out for Introduction on behalf of Gifts of Hope Unlimited  
**Date:** Tuesday, September 18, 2018 5:06:40 PM

It would be amazing to have Lois Lowry at the Library!

Sam, have you responded to Colleen? There are many things to think about ... If it is a fundraising event, how would we do this? What about the Friends who usually host authors?

We should get back to Colleen asap. Let's talk!  
Holly

On Sep 17, 2018, at 12:50 PM, development Goodnow Library Foundation  
<[goodnowlibraryfoundation@gmail.com](mailto:goodnowlibraryfoundation@gmail.com)> wrote:

----- Forwarded message -----

**From:** Colleen Keelan <[jkkeelan@verizon.net](mailto:jkkeelan@verizon.net)>  
**Date:** Sun, Sep 16, 2018 at 5:52 PM  
**Subject:** Lois Lowry Co-Sponsored Event Opportunity - Reaching out for Introduction on behalf of Gifts of Hope Unlimited  
**To:** <[goodnowlibraryfoundation@gmail.com](mailto:goodnowlibraryfoundation@gmail.com)>  
**Cc:** <[samjlowry@gmail.com](mailto:samjlowry@gmail.com)>

Dear Board,

I hope this email finds you well. My name is Colleen Keelan and I am a Sudbury resident and current Board member for the non-profit Sudbury charity, Gifts of Hope Unlimited. <http://www.giftsofhopeunlimited.org/>. Our mission is to bring financial independence to families and victims of domestic abuse. We collaborate with the town social worker and other agencies to fill the gaps for household goods and emergency funding when other resources are exhausted. The reason I am reaching out to your organization is to see if you would like to partner with us in April, 2019 on a fundraising Author event to assist both the Library and GOHU organizations? A personal friend of one of our Board members is Lois Lowry, author of notable books like *The Giver*, *Gathering Blue*, and children's books like *Gooney Bird Greene*. We have asked Lois to come to Sudbury early April of 2019 to give a talk about her books and to do a book signing. She is available the weekend of April 6-7 or the following weekend of April 13-14. Because of our relationship with her, she is not charging a fee to come. We will be providing her car transportation from the airport and her lodging. Would the Library Foundation be interested in hosting this talk and co-sponsoring this event with us? We were hoping to secure

space at the Library for it and provide light apps and refreshments. More details of the event could be discussed by phone or I am happy to come to one of your meetings in person. Feel free to reach out to me directly at 978-505-9736 or by email.

Many thanks for your time and consideration of this co-sponsored event opportunity. I hope you will be as excited as we are to have Lois Lowry in attendance.

Colleen Keelan

Lowry 2

**From:** [redacted]  
**To:** [redacted]  
**Subject:** RE: Lois Lowry - Urgent question on Charging Fees in a Public Place?  
**Date:** Thursday, January 17, 2019 9:30:06 AM

Hmmm, we are charging for this? I don't think that is a good idea for an author as big as this. Can we discuss?

**From:** Holly Bernene <hbernene@comcast.net>  
**Sent:** Thursday, January 17, 2019 8:44 AM  
**To:** Green, Esme <GreenE@sudbury.ma.us>  
**Cc:** Goodnow Library Foundation <goodnowlibraryfoundation@gmail.com>; Colleen Keelan <jckeelan@verizon.net>  
**Subject:** Fwd: Lois Lowry - Urgent question on Charging Fees in a Public Place?

Good morning, Esme,

The Friends are at it again and apparently annoyed that we are using the Library on April 6 for the Lois Lowry event.

I know we have spoken with you about the event and it's very exciting. I also believe that since it's a fundraiser that we can charge \$\$ (just like we do for the Galas). Can you confirm?

I gather that Karen is upset as well for not knowing about the event. We can speak with her, but perhaps you will talk with her as well.

Let me know if there are any conflicts or anything that we need to change about the event.

Thanks!

Holly

PS - I believe Sam is away for a few days. Not sure if she will be around to respond to these emails.

Begin forwarded message:

**From:** development Goodnow Library Foundation  
<goodnowlibraryfoundation@gmail.com>  
**Subject:** Fwd: Lois Lowry - Urgent question on Charging Fees in a Public Place?  
**Date:** January 17, 2019 at 8:29:23 AM EST  
**To:** Holly Bernene <hbernene@comcast.net>; Samantha Greenfield <samijoyg@gmail.com>

----- Forwarded message -----

From: **Colleen Keelan** <colleen.keelan@cityofniles.org>

Date: Wed, Jan 16, 2019 at 6:43 PM

Subject: Lois Lowry - Urgent question on Charging Fees in a Public Place?

To: <[mailto:colleen.keelan@cityofniles.org]>

Hi Sam!

Looking forward to catching up soon with you. In the meantime, Karen had a recent conversation with a representative from the Friends of the Goodnow Library. That person mentioned that we can not charge a fee for an event held in a public space like the library, as we can not prevent the public from using and attending the Library when its being held. She also was shocked that she (or the Friends) had not been made aware that we were holding an event on that date.

Is the fee question true, as it will drastically change our event? Should we be looking into space at Noyes Elementary school, if you think our event will cause a problem or rift with the Friends? Karen's daughter (a teacher there) said they may be open on that date. We would like to nail this down asap, as we do need to get back to Lois with event specifics soon.

Sorry to complicate but we wanted to reach you immediately, as this representative said she would take the issue up with the head of the Library if we intended to go through with it.

Thanks for your immediate reply. Feel free to call me too to speak directly - 978-505-9736.

Colleen

Lowry 3

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

From: Holly Bernene <[hbernene@comcast.net](mailto:hbernene@comcast.net)>  
To: Colleen Keelan <[ckeeelan@verizon.net](mailto:ckeeelan@verizon.net)>  
Cc: Goodnow Library Foundation <[goodnowlibraryfoundation@gmail.com](mailto:goodnowlibraryfoundation@gmail.com)>  
Sent: Thu, Jan 17, 2019 11:55 am  
Subject: Re: Lois Lowry - Urgent question on Charging Fees in a Public Place?

Hello again,

I just spoke with Esme, our Library Director. First, to explain my last response, I was confused about the "Karen" ... I assumed it was Karen at the Library but now I understand you meant Karen Cohen. I'm surprised that from what you said Karen Cohen didn't know about the event being on the 6th b/c didn't we discuss that with her there?

Anyway, back to the issue at hand which is charging a fee. While Esme is in full support of the event happening on the 6th, she did not know that we planned to charge. She thought we meant we would register and ticket everyone just for a headcount. I explained that making it a fundraiser for both Gifts of Hope and the GLF was the whole point of having her. I apologize for this lack of communication.

Esme does not think that we can charge for such a popular author when it's open to the public. I asked if we could be creative and ask for a "suggested donation". Esme is going to think about this in the next couple hours and get back to us. I do think we should look into Noyes as a back-up plan.

So sorry about this. Let's cross our fingers!  
Holly

PS - don't worry about the Friend's "representative" ... Esme is not at all concerned about their grumbling and will handle that!

On Jan 17, 2019, at 8:41 AM, Holly Bernene <[hbernene@comcast.net](mailto:hbernene@comcast.net)> wrote:

Hi Colleen,

Don't fret! I will speak with Esme. She is 100% on board with this. The Friends notoriously don't like us and do anything in their power to piss us off.  
I believe we can charge fees (we had a discussion) since it's a fundraiser. For instance, we charge for our Gala every year.

Don't worry! I'll get right back to you.  
Holly

On Jan 17, 2019, at 8:29 AM, development Goodnow Library Foundation <[goodnowlibraryfoundation@gmail.com](mailto:goodnowlibraryfoundation@gmail.com)> wrote:

----- Forwarded message -----

From: **Colleen Keelan** <[ckeeelan@verizon.net](mailto:ckeeelan@verizon.net)>  
Date: Wed, Jan 16, 2019 at 6:43 PM  
Subject: Lois Lowry - Urgent question on Charging Fees in a Public Place?  
To: <[goodnowlibraryfoundation@gmail.com](mailto:goodnowlibraryfoundation@gmail.com)>



Hi Sam!

Looking forward to catching up soon with you. In the meantime, Karen had a recent conversation with a representative from the Friends of the Goodnow Library. That person mentioned that we can not charge a fee for an event held in a public space like the library, as we can not prevent the public from using and attending the Library when its being held. She also was shocked that she (or the Friends) had not been made aware that we were holding an event on that date.

Is the fee question true, as it will drastically change our event? Should we be looking into space at Noyes Elementary school, if you think our event will cause a problem or rift with the Friends? Karen's daughter (a teacher there) said they may be open on that date. We would like to nail this down asap, as we do need to get back to Lois with event specifics soon.

Sorry to complicate but we wanted to reach you immediately, as this representative said she would take the issue up with the head of the Library if we intended to go through with it.

Thanks for your immediate reply. Feel free to call me too to speak directly - 978-505-9736.

Colleen

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Follow me @samigreenfield

Lowry 4

**From:** [Sammy Joy](#)  
**To:** [Karen Cohen](#); [Holly Lowry](#)  
**Subject:** Fwd: Lois Lowry - Urgent question on Charging Fees in a Public Place?  
**Date:** Thursday, January 17, 2019 2:16:35 PM

I was flying so could not respond earlier, but the situation below is very frustrating and embarrassing. Esme, you and I did discuss the \$20 ticket price and that it could be considered like our Gala and a ticketed fundraiser. We also discussed how this might upset the Friends but you were not concerned at that time. The fact that this organization now wants to take their event elsewhere bc they are scared of the bad relationship is awful. Many of our large donors are involved in this group and if this gets out, it will be damaging. Our reputation is now being tarnished and we have worked too hard to establish ourselves in the community.

I think worst case, we should ask the Friends to help us with the event as damage control to prove that we all work for the same mission. People are just going to avoid coming to us if we seem disorganized and to have issues behind the scenes (or stacks). Without community partners, we are going to have trouble in the future.

Best, Sam

----- Forwarded message -----

**From:** Colleen Keelan <[ckkeelan@verizon.net](mailto:ckkeelan@verizon.net)>  
**Date:** Thu, Jan 17, 2019 at 12:34 PM  
**Subject:** Re: Lois Lowry - Urgent question on Charging Fees in a Public Place?  
**To:** <[hbermene@comcast.net](mailto:hbermene@comcast.net)>  
**CC:** <[goodnow.library.foundation@gmail.com](mailto:goodnow.library.foundation@gmail.com)>, <[samjoy@gmail.com](mailto:samjoy@gmail.com)>, <[colleen.k@comcast.net](mailto:colleen.k@comcast.net)>

Thanks Holly for your response. Just to clarify, Karen Cohen is the one who spoke with a representative of the Friends and certainly is aware of the Lois event per attending our meetings. The person confused was the Friends representative. Her response was that the Friends were not made aware of our event and was taking it up with Esme. It sounds like we are treading on unsteady ground with your relationship with them. Again, we don't want to create any malice or issue with the Library as a whole. Not charging for something of this size is surely not what we intended. In fact, we feel this will make a wonderful fundraiser. I am thinking now that we should act quickly in securing another venue for it so as not to anger anyone - especially Lois when she comes (we don't want her to receive any negative feedback from Friends attendees).

Karen Cohen is copied here so she can proceed in asking her daughter about Noyes. I do feel we need to re-group ASAP on all this. Are you available for a meeting or, at minimum, a conf. call tomorrow or early next week?

Thank you,

Colleen

page 1

Lowry 5

**From:** [colleen.keelan@comcast.net](mailto:colleen.keelan@comcast.net)  
**To:** [Samantha Greenfield](mailto:Samantha.Greenfield@gmail.com); [Lois Bernene](mailto:lois@bernene.com)  
**Subject:** RE: Lois Lowry - Urgent question on Charging Fees in a Public Place?  
**Date:** Thursday, January 17, 2019 2:21:58 PM

Hmmm, I don't recall the \$20 ticket price. I think it if was an after hours event, maybe. But I don't think it would play well with the public to charge people money to see a beloved author at the public library...I am sorry if I was not thinking straight at the time we discussed it.

As far as the Friends go, I think they don't like it because it's right after the book sale and they still have the room technically booked, but they are usually out by the Saturday following the book sale. So I really don't think that should be a problem (famous last words).

**From:** Samantha Greenfield <[samjoyg@gmail.com](mailto:samjoyg@gmail.com)>  
**Sent:** Thursday, January 17, 2019 2:16 PM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>; Holly Bernene <[hbernene@comcast.net](mailto:hbernene@comcast.net)>  
**Subject:** Fwd: Lois Lowry - Urgent question on Charging Fees in a Public Place?

I was flying so could not respond earlier, but the situation below is very frustrating and embarrassing. Esme, you and I did discuss the \$20 ticket price and that it could be considered like our Gala and a ticketed fundraiser. We also discussed how this might upset the Friends but you were not concerned at that time. The fact that this organization now wants to take their event elsewhere bc they are scared of the bad relationship is awful. Many of our large donors are involved in this group and if this gets out, it will be damaging. Our reputation is now being tarnished and we have worked too hard to establish ourselves in the community.

I think worst case, we should ask the Friends to help us with the event as damage control to prove that we all work for the same mission. People are just going to avoid coming to us if we seem disorganized and to have issues behind the scenes (or stacks). Without community partners, we are going to have trouble in the future.

Best, Sam

----- Forwarded message -----

**From:** Colleen Keelan <[colleen.keelan@comcast.net](mailto:colleen.keelan@comcast.net)>  
**Date:** Thu, Jan 17, 2019 at 12:34 PM  
**Subject:** Re: Lois Lowry - Urgent question on Charging Fees in a Public Place?  
**To:** <[colleen.keelan@comcast.net](mailto:colleen.keelan@comcast.net)>  
**CC:** <[colleen.keelan@comcast.net](mailto:colleen.keelan@comcast.net)>, <[colleen.keelan@comcast.net](mailto:colleen.keelan@comcast.net)>, <[colleen.keelan@comcast.net](mailto:colleen.keelan@comcast.net)>

Thanks Holly for your response. Just to clarify, Karen Cohen is the one who spoke with a representative of the Friends and certainly is aware of the Lois event per attending our meetings. The person confused was the Friends representative. Her

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Lowry 6

**From:** [Green, Esme](#)  
**To:** [Holly Bernene](#)  
**Subject:** Re: Goodnow Library Foundation and the Friends  
**Date:** Friday, January 25, 2019 10:22:39 AM

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Excellent letter. I hope we can make some progress here. Esmé

Sent from my T-Mobile 4G LTE Device

----- Original message -----

**From:** Holly Bernene <[hbernene@comcast.net](mailto:hbernene@comcast.net)>  
**Date:** 1/25/19 6:28 AM (GMT-08:00)  
**To:** "Green, Esme" <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Subject:** Fwd: Goodnow Library Foundation and the Friends

Good morning -  
FYI I just sent this to the head of the Library Trustees. Meant to copy you.  
Holly

Begin forwarded message:

**From:** Holly Bernene <[hbernene@comcast.net](mailto:hbernene@comcast.net)>  
**Subject:** Goodnow Library Foundation and the Friends  
**Date:** January 25, 2019 at 9:26:13 AM EST  
**To:** Marie Royea <[marie.royea@gmail.com](mailto:marie.royea@gmail.com)>  
**Cc:** Barbara Pryor <[barbfredp1@aol.com](mailto:barbfredp1@aol.com)>

Hello Marie -

This is Holly Bernene - if you remember, I attended your Trustees meeting in the fall to have a chance to meet with you all.

I'm writing as President of the Board of the Goodnow Library Foundation. As I believe you know, there has been friction between our work and the work of The Friends of the Library. We are saddened by this tension as we are all working towards the same goal - to support our wonderful library. In the past several years, we (GLF) have tried to mend fences so that we can work in tandem. Unfortunately, our efforts have not worked.

Most recently, we are most disturbed about hearing that The Friends speak negatively about us outside of the library - to the public and potential supporters. We are concerned of the negative impact this will have not only on us as a foundation, but on Goodnow in general. The leader of the Friends has threatened to pull support from organizations that work with us, the GLF. Sam Greenfield, our Director of Development, has done an amazing job cultivating relationships throughout the community and we don't want this good work to be undermined.

It has reached a point when we need to take action. I'm hoping that you might be of help! I would love to speak with you on the phone, or I'm happy to meet with you at anytime. Please let me know your thoughts and availability.

Thanks so much.  
Holly Bernene  
(617) 838-7365

Lowry 7

**From:** Green, Esme  
**To:** Holly Bernene; [alangordon@comcast.net](mailto:alangordon@comcast.net); [pete\\_suejohnson@verizon.net](mailto:pete_suejohnson@verizon.net); [imayyasi@yahoo.com](mailto:imayyasi@yahoo.com); [Gordon, Lily](mailto:Gordon, Lily)  
**Cc:** [marie.royea@gmail.com](mailto:marie.royea@gmail.com); [Pryor, Barbara](mailto:Pryor, Barbara)  
**Subject:** RE: GLF and The Friends  
**Date:** Friday, February 1, 2019 3:38:54 PM

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Hi all, this item is on our next agenda for discussion. Please be mindful of open meeting laws and do not start a discussion over email (or in person). Thanks, Esmé

**From:** Holly Bernene <[hbernene@comcast.net](mailto:hbernene@comcast.net)>  
**Sent:** Friday, February 1, 2019 3:35 PM  
**To:** [alangordon@comcast.net](mailto:alangordon@comcast.net); [pete\\_suejohnson@verizon.net](mailto:pete_suejohnson@verizon.net); [imayyasi@yahoo.com](mailto:imayyasi@yahoo.com); [Gordon, Lily](mailto:Gordon, Lily) <[lilyannngordon@gmail.com](mailto:lilyannngordon@gmail.com)>  
**Cc:** [marie.royea@gmail.com](mailto:marie.royea@gmail.com); [Pryor, Barbara](mailto:Pryor, Barbara) <[barbfredp1@aol.com](mailto:barbfredp1@aol.com)>; [Green, Esme](mailto:Green, Esme) <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Subject:** GLF and The Friends

Hello Goodnow Library Trustees,

I am writing to you all at the recommendation of Barbara Pryor. (I emailed Marie separately, but understand that she has been traveling.)

I write in my capacity as President of the Board of the Goodnow Library Foundation. As I believe you know, there has been friction between our work and the work of The Friends of the Library. We are saddened by this tension as we are all working towards the same goal - to support our wonderful library. In the past several years, we (GLF) have tried to mend fences so that we can work in tandem. Unfortunately, our efforts have not worked.

Most recently, we are most disturbed about hearing that The Friends speak negatively about us outside of the library - to the public and potential supporters. We are concerned of the negative impact this will have not only on us as a foundation, but on Goodnow in general. The leader of the Friends has threatened to pull support from organizations that work with us, the GLF. Sam Greenfield, our Director of Development, has done an amazing job cultivating relationships throughout the community and we don't want this good work to be undermined.

It has reached a point when we need to take action. I'm hoping that you might be of help. Barbara suggested that the issue might be discussed at your February meeting with the understanding that there won't be a quorum. But then at the March meeting you all could read the minutes describing the discussion and we could work on a solution.

Thanks so much,  
Holly Bernene



**GLF BOARD MEETING MINUTES**  
**March 19, 2019**

**Present:** Holly Bernene, Helen Crary, Peter Fearey, Jennifer Hunt, Sam Karustis, Lee McGowan, Barbara Pryor, Ken Vona, Samantha Greenfield and Kristin Schneider

**1. Administrative**

*Meeting Minutes from January 22, 2019:*

Change date of Helen's house party in minutes to Sept 8, 2019.

Holly motions to approve. Helen second. All vote in favor.

*Board of Trustees Meeting re The Friends:*

Holly and Sam met with the Trustees of the Goodnow Library to discuss the Friends' negative remarks about the Foundation made to the Gifts of Hope organization.

Esme met with Melissa Rodriguez (town manager and attorney) to discuss possible legal options to manage the relationship with the Friends. The Trustees will draft and send a letter to the Friends to stop speaking negatively about the Foundation.

Ken asked how much money the Friends donates towards the library. Esme estimates around \$50K. We are hopeful the letter sent to the Friends is a good step in the right direction in fixing the relationship. Barbara mentioned that Marie Royea, the Chair for the Trustees, is going to speak with the Friends also.

**2. Library Report**

Esme was not in attendance because of illness. Sam G. reported on her behalf. Esme's update was the meeting she had with Melissa Rodriguez, which was discussed during the Administrative portion of the meeting (see above).

**3. Development Update**

*Appeals:*

Sam reported that we have decided to restructure the appeal timeline. We will not be doing a Spring Appeal, which would be too close to the Mini-Golf/Gala event on April 27, 2019.

We will mail the annual appeal in early July, and plan around the town's annual 4<sup>th</sup> of July celebration. Helen suggested that we tie the appeal into the library's town float in the parade. We decided to restructure the appeal based on a recommendation from Ken and the success he had with the Foundation for MetroWest. The Foundation for MetroWest collected 1/3 (\$80-\$85K) in July through an appeal run through social media.

Ken suggested that we ask the community coming to the 4<sup>th</sup> of July parade to bring a book to the parade and donate to the library for resale for a book sale, by handing the book to staff as the float passes by in the parade. Ken believes we need to aim for the smaller donations. We need to wrap our heads around supporting our community and the library is part of that community.



Lowry 9

**Fw: Lois Lowry**



Susan Pettit <pettitsg@comcast.net>

To: You

Fri 12/2/2022 3:00 PM

----- Forwarded Message -----

From: "Karen Cohen" <cohen.k@comcast.net>

To: "Susan Pettit" <pettitsg@comcast.net>

Sent: 12/2/2022 10:39:33 AM

Subject: Lois Lowry

To whom it may concern:

A private conversation between two friends, Susan Pettit and me, brought to light that a fund raiser with Lois Lowry as our speaker for GOHU could not be held at the library due to library rules about charging admission. The event was moved to the Peter Noyes school. It was an incredibly beautiful day, and I think the weather impacted all activities. We were very fortunate to be able to charge admission and to have Lois's books available for sale, and she stayed to autograph them. Because of the conversation with Susan, we were able to quickly change the venue and free up the library for an ongoing event the same day.

Respectively submitted,

Karen E Cohen

Sent from my iPhone

Middlesex 1

**From:** [redacted]  
**To:** [redacted]  
**Subject:** Re: look at this???  
**Date:** Wednesday, January 16, 2019 2:23:02 PM

I meant to talk to you about this. They announced it at their last meeting and i was pretty sure it was a mistake. But what can we do??

Sent from my T-Mobile 4G LTE Device

----- Original message -----

**From:** development Goodnow Library Foundation <goodnowlibraryfoundation@gmail.com>  
**Date:** 1/16/19 2:19 PM (GMT-05:00)  
**To:** Holly Bernene <hbernene@comcast.net>, "Green, Esme" <GreenE@sudbury.ma.us>, melissa remley <melissaremley@me.com>  
**Subject:** Fwd: look at this???

My friend Marissa from the Wellesley Library just sent me the link below which states that the Middlesex Charitable Foundation just awarded The Friends a grant of 15K. I am praying this information is incorrect b/c this is the bank that Melissa is writing a grant to, and if they met with our contact and did this without telling us, it will really be upsetting.

-Sam

----- Forwarded message -----

**From: development Goodnow Library Foundation**  
<goodnowlibraryfoundation@gmail.com>  
**Date:** Wed, Jan 16, 2019 at 2:15 PM  
**Subject:** look at this???  
**To:** melissa remley <melissaremley@me.com>

<http://www.middlesexlib.com/about-us/news-events/news-middlesex-says-friends-but-to-give-15-million-to-loc>

Why are the Friends listed here????

-Sam

20

**From:** Holly Beaman  
**To:** Goodnow Library Foundation  
**Cc:** Emma Green; Melissa Remley  
**Subject:** Re: look at this???  
**Date:** Wednesday, January 16, 2019 3:13:41 PM

GRRRRRRRRR .....

On Jan 16, 2019, at 2:20 PM, development Goodnow Library Foundation  
<[goodnowlibraryfoundation@gmail.com](mailto:goodnowlibraryfoundation@gmail.com)> wrote:

My friend Marissa from the Wellesley Library just sent me the link below which states that the Middlesex Charitable Foundation just awarded The Friends a grant of 15K. I am praying this information is incorrect b/c this is the bank that Melissa is writing a grant to, and if they met with our contact and did this without telling us, it will really be upsetting.

-Sam

----- Forwarded message -----

**From:** development Goodnow Library Foundation  
<[goodnowlibraryfoundation@gmail.com](mailto:goodnowlibraryfoundation@gmail.com)>  
**Date:** Wed, Jan 16, 2019 at 2:15 PM  
**Subject:** look at this???  
**To:** melissa remley <[melissaremley@mc.com](mailto:melissaremley@mc.com)>

[https://www.middlesexbank.com/about-us/news-events/news/middlesex-savings-bank-to-give-\\$1-4-million-to-loc](https://www.middlesexbank.com/about-us/news-events/news/middlesex-savings-bank-to-give-$1-4-million-to-loc)

Why are the Friends listed here????

-Sam

9/16/19

## Middlesex 2

**From:** [development@goodnowlibraryfoundation@gmail.com](mailto:development@goodnowlibraryfoundation@gmail.com)  
**To:** [esme.green@middlesexbank.com](mailto:esme.green@middlesexbank.com)  
**Cc:** [melissaremley@mc.com](mailto:melissaremley@mc.com); [esme.green@middlesexbank.com](mailto:esme.green@middlesexbank.com)  
**Subject:** Re: look at this???  
**Date:** Wednesday, January 16, 2019 3:24:59 PM

Ok, I will email our contact now and copy you all.

On Wed, Jan 16, 2019 at 3:03 PM Green, Esme <[esme.green@middlesexbank.com](mailto:esme.green@middlesexbank.com)> wrote:

I'm at a minuteman meeting and evidently, Middlesex savings has given 15k to all libraries where they have branches. So maybe not a mistake after all....

Sent from my T-Mobile 4G LTE Device

----- Original message -----

**From:** development Goodnow Library Foundation  
<[goodnowlibraryfoundation@gmail.com](mailto:goodnowlibraryfoundation@gmail.com)>  
**Date:** 1/16/19 2:19 PM (GMT-05:00)  
**To:** Holly Bernene <[hbernene@comcast.net](mailto:hbernene@comcast.net)>, "Green, Esme" <[esme.green@middlesexbank.com](mailto:esme.green@middlesexbank.com)>, melissa remley <[melissaremley@mc.com](mailto:melissaremley@mc.com)>  
**Subject:** Fwd: look at this???

My friend Marissa from the Wellesley Library just sent me the link below which states that the Middlesex Charitable Foundation just awarded The Friends a grant of 15K. I am praying this information is incorrect b/c this is the bank that Melissa is writing a grant to, and if they met with our contact and did this without telling us, it will really be upsetting.

-Sam

----- Forwarded message -----

**From:** **development Goodnow Library Foundation**  
<[goodnowlibraryfoundation@gmail.com](mailto:goodnowlibraryfoundation@gmail.com)>  
**Date:** Wed, Jan 16, 2019 at 2:15 PM  
**Subject:** look at this???  
**To:** melissa remley <[melissaremley@mc.com](mailto:melissaremley@mc.com)>

<https://www.middlesexbank.com/about-us/news-events/news/middlesex-savings-bank-to-give-51-million-to-100>

Why are the Friends listed here????

-Sam

Middlesex 3

**From:** [Green, Esme](#)  
**To:** [development Goodnow Library Foundation](#); [Holly Bernene](#); [melissa remley](#)  
**Subject:** Re: Volunteer Opportunities with your staff  
**Date:** Wednesday, January 16, 2019 4:02:51 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)

---

Interesting

Sent from my T-Mobile 4G LTE Device

----- Original message -----

**From:** [development Goodnow Library Foundation <goodnowlibraryfoundation@gmail.com>](#)  
**Date:** 1/16/19 4:01 PM (GMT-05:00)  
**To:** "Green, Esme" <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>, [Holly Bernene <hbernene@comcast.net>](#),  
[melissa remley <melissaremley@me.com>](#)  
**Subject:** Fwd: Volunteer Opportunities with your staff

----- Forwarded message -----

**From:** **Kuza, Michael** <[MICHAEL.KUZA@middlesexbank.com](mailto:MICHAEL.KUZA@middlesexbank.com)>  
**Date:** Wed, Jan 16, 2019 at 3:44 PM  
**Subject:** RE: Volunteer Opportunities with your staff  
**To:** [development Goodnow Library Foundation <goodnowlibraryfoundation@gmail.com>](#)

Hi Sam –

Yes, that gift is targeted specifically to the "Friends". It was part of larger proactive community gift initiative. Goodnow Library is still eligible to apply for a grant in 2019.

I hope that helps clarify. Please let me know if you have any additional questions.

Thanks.

Mike

**Mike Kuza**

**Middlesex Savings Bank**

&

**Middlesex Savings Charitable Foundation**



---

mkuza@middlesexbank.com

**NOTICE:**

The message above is intended solely for the addressee and may be privileged, confidential or otherwise exempt from disclosure, and does not form a contract. If you are not the addressee, or the employee or agent responsible for delivering the message to the addressee, then you are notified that any dissemination or copying of this message or any attachment is prohibited. If you have received this message in error, then please notify us immediately at the email address above. Thank you.

**From:** development Goodnow Library Foundation [mailto:goodnowlibraryfoundation@gmail.com]

**Sent:** Wednesday, January 16, 2019 3:32 PM

**To:** Kuza, Michael

**Subject:** Re: Volunteer Opportunities with your staff

*External Email Security Warning: This email was sent from an unknown source outside of Middlesex Savings Bank. This may be a malicious phishing. Attachments or links may include viruses or malicious content. If you are suspicious of the sender or content report it immediately using the phishing alert button.*

Hi again.

I just heard from our Friends about this donation [https://www.middlesexbank.com/about-us/news-events/news/middlesex-savings-bank-to-give-\\$1-4-million-to-loc](https://www.middlesexbank.com/about-us/news-events/news/middlesex-savings-bank-to-give-$1-4-million-to-loc)

that they received and we wanted to confirm that it was supposed to go to the Friends and not the Goodnow Library Foundation? I only ask since we have applied with you and have a relationship, so not sure if it is was a mistake? Of course the library is overall grateful for any support, I was just checking in since we plan to apply for your grant this year and not sure how this affects things.

2

Best regards,

Sam

Samantha Greenfield

Development Director

Goodnow Library Foundation

(978)440-5562

On Tue, Jan 15, 2019 at 2:47 PM Kuza, Michael <[MICHAEL.KUZA@middlesexbank.com](mailto:MICHAEL.KUZA@middlesexbank.com)> wrote:

Hi Sam –

It's nice to hear from you. I hope all is well.

I forwarded an earlier email from Goodnow to our MSB Connect Volunteer Group before the holidays. They are currently exploring a number of opportunities for their group, including the opportunity you've presented. They're aware you'd be willing to work with them on other options as well. From what I understand, they are looking at a March timeframe. I'll let you know if there's interest on their end in pursuing an opportunity.

Thanks again for reaching out.

Best,

Mike

**Mike Kuza**

Middlesex 4

## **The Friends of the Goodnow Library Awarded \$15,000 from Middlesex Savings Bank**

On Thursday, January 24, 2019, The Friends of the Goodnow Library received a \$15,000 gift from the Middlesex Savings Bank. Alice Levine, president of the Friends and Susan Pettit, vice president, accepted the gift on behalf of the organization at a reception held at Middlesex Savings Bank headquarters in Westborough, MA. This grant will be used to expand the Friends annual support of programming and resources not included in the annual town budget for the Goodnow Library in Sudbury.

“Local libraries play a major role in making our communities the special places they are, said Mike McAuliffe, president and CEO of Middlesex Savings Bank. “They provide important resources that residents of all ages can utilize and enjoy. We are pleased to be making this gift to support all that they do.”

The \$15,000 gift to The Friends of the Goodnow Library is part of a cumulative gift of \$1.4 million that Middlesex Savings Bank distributed to 84 nonprofit organizations including libraries, food pantries, and senior centers within the Bank’s retail branch territory.

The Friends of the Goodnow Library is an independent, nonprofit 501(c)3 charitable organization dedicated to enhancing library services in the town of Sudbury, MA. The Friends are an all-volunteer group of supporters who believe that a vibrant public library makes a difference in the lives of Sudbury’s citizens. Membership is open to anyone who is interested in supporting the library. Incorporated in 1988, the Friends organization has provided essential funding and other support for the library for more than 30 years. During that time, the Friends have contributed more than **\$1.25 million** to the library, funding many of the most popular services the library offers. For more information, please visit [www.friendsofgoodnow.org](http://www.friendsofgoodnow.org).

Middlesex Savings Bank, founded in 1835 and headquartered in Natick, Mass., is a mutual savings bank. As one of the largest independent banks in Massachusetts with assets exceeding \$4.7 billion, the Bank has been committed to providing outstanding value in consumer banking and business banking products for more than 180 years. The FDIC and DIF insured bank has 30 branch offices located in 25 communities – Acton, Ashland, Bedford, Bellingham, Boxborough, Concord,



Framingham, Franklin, Groton, Holliston, Hopkinton, Littleton, Maynard, Medfield, Medway, Millis, Natick, Needham, Sherborn, Southborough, Sudbury, Walpole, Wayland, Wellesley, and Westford. For more information, please visit [www.middlesexbank.com](http://www.middlesexbank.com), and connect on Facebook, Instagram and Twitter.

12/05/22

### Laura's Presentation to the Trustees

My name is Laura Dowling, and I live at 25 Harness Lane. I have been the Treasurer of the Friends of the Goodnow Library for more than 13 years. I will be speaking to you about the Friends' budget process and our spending practices.

The Friends is an independent, nonprofit organized and staffed by volunteers and is an entity distinct from the Goodnow Library. Its mission to support and stimulate interest in the Goodnow Library has been carried out for more than 30 years including the past 2 years in which we have continued our good works by hosting an outdoor, drive-in summer movie and multiple Zoom programs on cooking and art which were attended by not only Sudbury residents but interested people throughout the country and abroad. We have given away nearly 8,000 books that were donated and ready for our pre-pandemic book and bake sale. The books were donated to elementary schools, Curtis Middle School, many area nursery school and day care centers, little neighborhood libraries and new teachers needing to create libraries in their classrooms.

About seven years ago, under new leadership, the Friends adopted a more business-like approach to funding our activities. To ensure we were in line with the guidance from the Attorney General's closer monitoring of nonprofits, we adopted a formal budget process that would allow us to keep our records in order and track spending. This is how it worked:

We adopted a general rule that our budget for each fiscal year would be based upon the income received during the preceding fiscal year. There were exceptions to this rule depending upon the previous year's spending and any special programs or resources we wanted to fund outside of the general budget. The Friends' President and Vice President would meet in person in May with the Library Director and Assistant Director to discuss available monies and library needs. We also reviewed spending for Friends-produced programming, museum pass and film license expenses and expected administrative expenses. With respect to library-produced programming, budget allocations were on a departmental basis. Department heads were free to spend the money allocated to them as they saw fit. There were no conditions attached to this funding,

though we did ask that the Friends be acknowledged for their contributions when the programs were presented, as all charitable funding organizations require. We notified the Library Director in June of each year of the department budget allocations for the coming year.

As Treasurer I would send a report each month to the department heads with their expenditures vs. the budget so they could keep track of their spending. If there were any discrepancies between their records and mine, we would work together to identify and correct any problems.

It is a general rule of practice that a nonprofit should maintain at least a two years expense budget in reserve for operating expenses in case of lean years. Because of the pandemic, we have not done any fundraising since the Fall of 2019. Our annual Book and Bake sale scheduled for April, 2020 was cancelled as a result of the pandemic. Another major fundraising event with the nationally known political satire group, The Capitol Steps, that was scheduled to take place at LS two weeks before the 2020 election was also canceled. Because we adhered to the 2-year reserve recommendation, we were able to fund library programming and other expenses through the pandemic as well as the current year.

We are sharing a number of pages that come from the correspondence to illustrate our budgeting process was well known by library staff and our funding of library-produced programming was not cut nor conditioned.

Let me describe the sources of our money. Nearly 50% of the funds we receive in any given year are generated by book sales and other fundraising activities. Nearly all of the remaining funds we receive come to us in the form of memberships. These memberships give the members a sense of belonging to a committed group of volunteers and entitles them to early access to book sales and other fundraising activities, invitations to special member events, a monthly newsletter and the right to vote for our officers. The remainder of the funds we receive is in the form of unsolicited donations, but it is usually a small percentage of the total. We have not accepted any donations that restrict our use of the money donated. All money received by the Friends, regardless of source, is spent at the discretion of the Friends and consistent with our mission. That is how all independent 501(c)(3) nonprofits operate.

About half of our spending in any given year is in the form of reimbursements or direct payments for library-produced programming. The other half is spent on Friends-produced programming, museum passes, movie license, copier rental (until the Town allocated money through a revolving account to cover this), the entrance garden planting and maintenance and administrative costs. On average we donated \$30,000 to the library. That number does not include special projects such as the book drop that cost \$7,700 nor the \$40,000 we donated toward the redesigned front lobby, nor annual staff appreciation gifts.

In recent filings of the Form 990 EZ tax return we no longer categorize ourselves as a “supporting organization”, as defined by the IRS. We are a 501(c)(3) nonprofit organization classified by the IRS as a “Public Charity”. We contacted legal counsel specializing in nonprofit law, and they advised us that we were not a “supporting organization” as defined by the IRS, and that we should apply to the IRS for a formal correction to our classification. We did file the appropriate application which was approved by the IRS. The updated classification makes it easier for us to receive funds from donor-advised accounts, but it does not affect our nonprofit status, nor does it change our charter or our mission.

I will now turn the program over to Claudia Brandon.

## FY2021 budget process correspondence (May - September, 2020)

Attached are correspondence related to the budgetary process for FY2021. One of the reasons for severing relations with the Friends was that the Friends were accused of under-funding library programs in FY2021. FY2021 was a pandemic year, but except for splitting the budget into two pieces, summer and the rest of the year, the Friends' budget process has been the same for more than five years.

Correspondence #1 shows that the summer budget was approved in full, with the exception of an end-of-summer party, for which the library could submit an off-budget request if it was determined the party was possible.

Correspondence #2 shows a request for \$800 in additional funds to cover additional activity kits for a successful children's summer program. The request was approved and money funded.

Correspondence #3 shows the Library Director's request to library staff to put together a proposed budget for the rest of the fiscal year. The Head of Reference Services puts together a 12-month budget for adult programming in response.

Correspondence #4 shows the proposed library budget for the remainder of the fiscal year, but note that the amount requested for adult programming is the same 12-month budget from correspondence #3, but only 10 months remain in the fiscal year.

Correspondence #5 shows a request for additional off-budget funding for a home schooling program fee of \$100. This request was approved and the money funded. Though not included here, a request for another \$100 for the home schooling program was submitted, approved and funded.

Correspondence #6 shows Friends' concern over the budget request for the balance of the year and a request for a meeting to discuss the budget proposal.

Correspondence #7 shows the Friends' approval of the budget request for the balance of FY2021, with two exceptions and the reasons for them. The budget request was 10% higher than the previous year and included money already spent for summer programming. The Friends approval is for level-funding from the previous year for the balance of FY2021. Also noted is that because of the pandemic, the Friends were unable to raise the revenue anticipated for the previous year and as a result would have to take money from their reserves to cover the level-funding for the balance of FY2021.

Correspondence #8 shows that the Library Director is not satisfied with the level-funded budget, wants to financially divest from the Friends and asks staff to consider how to do this.

#1

**From:** [Alice Levine](#)  
**To:** [Green, Esme](#)  
**Subject:** 2020 Summer budget  
**Date:** Thursday, May 14, 2020 12:26:18 PM

---

Hi Esme,

I just wanted to let you know that we had a successful meeting on zoom and on the phone and catch you up on a few things. The Board voted to approve the budget with one exception and a question regarding the children's virtual event line item. We wanted to know how many events and what type of events were being considered. (Amy did answer this question in her e-mail this morning) We are very interested in the Children's virtual programming as this is something the Friends might like to try for our programming. We were not quite ready to commit to the party at Haskell until we see how the season goes. If all goes well and it looks like the Haskell party is possible, Amy is welcome to come back to the Board with the plans for the end of the year party.

The reading challenge charity donation was approved. The Food Bank is a terrific idea and I am sure very needy. The Board voted to reimburse the staff for gift cards as we thought that gift cards were the most effective and helpful way for the library and food bank staff. We would hope that any purchases made would be done locally to support local business. If there is an alternative distribution idea please let me know, but the reimbursement to library staff is key.

Since we would like to be in our member's minds while the library is closed; it would be wonderful if Amy, Lili, and Karen could provide us with a calendar and any flyers of their offerings that we sponsor. We are going to try to have more frequent and shorter contact with our members and this would give us lots of good information as well as being good advertising for the library. Please send the information to Susan at [pettitsg@comcast.net](mailto:pettitsg@comcast.net).

The copier bill was a bit of a shock as there were no funds to offset the expenses. Laura will be talking to Anna about any ideas she might have to reduce the bill. Laura did put a hold on the Book Page subscription and the movies license. They will both be extended starting from the time the library reopens and covering the months the library has been closed. We will try to do the same with all of the museum passes.

We would appreciate the mention of "sponsored or paid for by the Friends" on the program that we are covering for the summer season. Please let me know if you have any questions.

Stay Well,  
Alice

**From:** Amy Stimac  
**To:** Laura Dowling; Alice Levine  
**Cc:** Green, Esme  
**Subject:** Budget request  
**Date:** Thursday, July 9, 2020 5:17:52 PM

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#2

Hi Laura and Alice,

As you both know, our activity kits have been a hit. Our original plan was to distribute 150 kits per week. Week 1 "sold out" in half an hour. We had a number of families who were sad that they missed out on getting a kit so we decided to ramp up production and created 200 kits for week 2. Those "sold out" in an hour and again, we had disappointed families. So, for week 3 we decided we would ramp up production a little more and we created 250 kits. Registration for those go live tomorrow at 9 AM and I'm hoping we still have some left for families by 11 am. Fingers crossed!

We have nearly 500 kids signed up for summer reading and we think that we might hit upwards of 600 kids. The fact is that we do not have the staffing nor the budget to meet the full demand for activity kits for all of these participants. So, I have decided that we are capping our production at 250 kits per week. Heidi and I took a long hard look at the original guesstimate budget we submitted to the Friends in early May. We decided to only book 2 trivia nights (one on July 20 and the other on Aug 10) and no other virtual performers. We are also cutting the caterpillars activity. However, the cost of increasing our production each week is more than these two cuts can cover.

I did apply for a CARES act grant through the state to see if I could get some grant money to cover these increased costs but sadly, I just learned that Goodnow was not awarded the grant.

Thus, I am reaching out to the Friends to see if you might be able to approve an additional \$800 to cover these costs.

Thanks for your consideration,  
Amy

--  
Amy Stimac  
Head of Children's Services  
Goodnow Library  
21 Concord Road  
Sudbury, MA 01776  
978-440-5545  
*she/her/hers*

**From:** [Green, Esme](#)  
**To:** [Amy Stimac](#)  
**Subject:** FW: Friends budget prep  
**Date:** Friday, August 14, 2020 1:41:51 PM  
**Attachments:** [image002.png](#)

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#3

**From:** Joanne Lee <jlee@minlib.net>  
**Sent:** Friday, August 14, 2020 12:40 PM  
**To:** Green, Esme <GreenE@sudbury.ma.us>  
**Subject:** Re: Friends budget prep

Hi Esme,  
For FY21, I would like to propose a \$6,000 budget for Adult Programs.

The breakdown behind this:

- 1) \$400 (third party presentations) x 12 = \$4,800
  - 2) \$50 (craft supplies) x 12 = \$600
  - 3) \$10 (weekly summer reading prizes) x 8 = \$80
  - 4) \$100 (grand prize-summer reading) = \$100
- Total: \$5,580 (round up to \$6,000)

My thinking is that if there is any money left over each month, it will allow me to create other adult programs that I might want to launch/experiment with.

Thank you!

On Thu, Aug 13, 2020 at 12:05 PM Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)> wrote:

Hi all,

As you are aware, due to covid and its timing, the Friends did not give us an FY21 budget in June, but instead provided a stop-gap budget to get us through summer programming. Now that summer activities are winding down, we really need to get a budget in place.

Could each of you work on a budget proposal that would be ready for a meeting with the Friends. They haven't asked us for one yet, but I assume it will be soon. I am attaching some historical requests for you to review. Thanks! And if anyone feels like a zoom conversation about this would help, just let me know and we will arrange it.

*Esme E. Green (she/her)*  
*Director, Goodnow Library*  
*Past President, MLA*  
978-440-5515





Massachusetts  
Library Association

#3  
continued

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Joanne Lee  
Head of Reference Services  
Goodnow Library  
21 Concord Rd  
Sudbury, MA 01776  
(978) 440-5524

**From:** [Amy Stimac](#)  
**To:** [Alice Levine](#)  
**Cc:** [sue.pettit](#); [Laura Dowling](#); [megankelley4@gmail.com](#); [Jean Nam](#); [Pat Scott](#); [barbara.cook](#); [Claudia Brandon](#); [Lisa Cornacchia](#); [Maria Dawson](#); [Green, Esme](#)  
**Subject:** FY21 Budget Request  
**Date:** Friday, August 14, 2020 4:09:07 PM

---

Hi Alice,

I hope you are doing well! Today is the last day of Summer Reading and, I've got to say, it has been very successful, especially when you take into account the times in which we find ourselves. All told, 662 people signed up for summer reading and collectively read 250,130 minutes! Our teen librarian Lily had great engagement with teens this summer through online book clubs and fabulous take and make programs over zoom. The children's department created and distributed 1,600 activity kits (!!) and adults have been more engaged in summer reading than in any previous year.

Back in May, when you asked us for programming budgets for the summer, we gave our best estimates and now looking back, we got some things right and other things wrong. We certainly made the right decision to create activity kits for contactless pickup. However, we did not know that the activity kits were going to be SO popular and our initial request was too low and thus we had to make a second request. While adults participated in the Spring reading challenge at historic levels, their participation dropped off as we entered the summer and thus I really overestimated how many people I thought would sign up for Summer Reading. I thought we might get 2000 people, but only ended up with 662. If I've learned anything from this summer it is that it's very difficult to predict programming needs and spending.

Those of us who run programming here at Goodnow (Joanne Lee, Lily Nicolazzo, Ferrell Mackey and myself) are beginning to plan for the rest of the year (sept-june) and are hoping that the Friends will take the following budget request into consideration. Typically, we ask for specific amounts in the following categories: Director's Budget, Adult Programming, Teen Programming, Children's Programming, Children's Summer Reading, Teen Summer Reading. Summer is now over thus we do not have a budget request for either Children's or Teen summer reading. We are also not asking for any money for the Director's Budget this year. We have found that take and make crafts have been very popular with teens and children and we would like to expand this to adults this fall. The NOW lab is a great community resource that is currently inaccessible to the public. The NOW lab coordinator, Ferrell Mackey, in conjunction with Joanne Lee, the new Head of Reference, would like to offer some virtual craft making programming for adults this year. Thus we are including a budget request for NOW lab programming to cover the cost of craft materials (i.e. programming supplies, not capital expenditures). The table below represents our best estimates at this date in time. However, we would like to ask for the flexibility to move amounts around between these categories. In practice, we would like to approach the full \$18,000 as one funding line called "All Ages Programming."

Adult Programming	\$6,000
Children's Programming	\$9,000
Teen Programming	\$2,000
NOW Lab Programming	\$1,000
Total	\$18,000

#4  
combined

Why do we want to do this? Because we really have no idea how the year is going to play out. Which age groups will want virtual programming? What will that virtual programming look like? If we open up again, which ages will be comfortable with in-person programming? Will the take and make craft model continue? Will the library re-open? Will we close again and everything that is currently happening come to an abrupt halt? As you can see there are SO many unknowns. Thus it is difficult to predict what each department will spend on programming. Approaching the budget as a lump sum that the four of us co-manage will allow us much needed flexibility.

I am on vacation next week but I wanted to send this to you before I left to give you and the Friends board time to consider this request. I look forward to connecting about this when I return on August 24th.

I thank the Friends of the Goodnow Library for their continued support and consideration of this budget request,

Amy

--  
Amy Stimac  
Head of Children's Services  
Goodnow Library  
21 Concord Road  
Sudbury, MA 01776  
978-440-5545  
she/her/hers

#5

**From:** [Green, Esme](mailto:Green, Esme)  
**To:** [Lee, Joanne](mailto:Lee, Joanne)  
**Subject:** FW: FW: homeschooling presentation  
**Date:** Tuesday, August 25, 2020 10:48:11 AM

---

FYI

**From:** Laura Dowling <[lsdowling4@gmail.com](mailto:lsdowling4@gmail.com)>  
**Sent:** Tuesday, August 25, 2020 10:21 AM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Cc:** Alice Levine <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)>  
**Subject:** Re: FW: homeschooling presentation

Hi Esme

Yes, the Friends will definitely support the \$100. Do you want to send the money in and I can reimburse you or do you want me to send the check to the PO box in Arlington? It might get there a little late even if I mail it today. Please advise.

Great program!  
Laura

On Tue, Aug 25, 2020 at 9:28 AM Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)> wrote:

Hi Laura,  
Will the Friends pay for this? We don't have a budget so I just don't know. If the answer is "no" or "not yet," just let me know and I will figure something else out. Thank you! Esmé

**From:** Joanne Lee <[jlee@minlib.net](mailto:jlee@minlib.net)>  
**Sent:** Monday, August 17, 2020 1:55 PM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Subject:** Fwd: homeschooling presentation

Hi Esme,  
Here is the information for my program on Getting Started Homeschooling, presented by Advocates for Home Education in Massachusetts...scheduled for August 27 6:30pm-8:00pm. They are asking for a fee (they call it a donation!) of \$100, and the W-9 is attached.

Thank you,  
Joanne

----- Forwarded message -----

**From:** Stephanie Griego <[garciaarte@mac.com](mailto:garciaarte@mac.com)<<mailto:garciaarte@mac.com>>>  
**Date:** Mon, Aug 17, 2020 at 1:45 PM  
**Subject:** Re: homeschooling presentation  
**To:** Joanne Lee <[jlee@minlib.net](mailto:jlee@minlib.net)<<mailto:jlee@minlib.net>>>

Hi Joanne,

I've attached the press release. Feel free to edit.

I've also attached the W-9. The check should be made payable to Advocates for Home Education in MA.

Please mail it to:

PO Box 1307

Arlington, MA 02474

I'll be in touch closer to the event to get the necessary Zoom information. Let me know if you have questions.

Stephanie

MS  
Completed

# 6

**From:** Green, Esme  
**To:** Ingrid Mavvasi (imavvasi@gmail.com)  
**Subject:** FW: Regarding Program Budget for 2020-21  
**Date:** Tuesday, August 25, 2020 9:56:53 AM

---

I can't even.

**From:** Amy Stimac <AStimac@minlib.net>  
**Sent:** Tuesday, August 25, 2020 9:55 AM  
**To:** Green, Esme <GreenE@sudbury.ma.us>  
**Subject:** Fwd: Regarding Program Budget for 2020-21

----- Forwarded message -----

**From:** Alice Levine <alicelevine53@hotmail.com>  
**Date:** Tue, Aug 25, 2020 at 9:52 AM  
**Subject:** Regarding Program Budget for 2020-21  
**To:** Amy Stimac <AStimac@minlib.net>  
**Cc:** Laura Dowling <lsdowling4@gmail.com>

Hi Amy,

I hope you had a great vacation and everyone is well at your house.

I got your e-mail for the coming year's programming budget. We need to discuss in greater detail the contents of your proposed budget. As you know, we were unable to hold our book sale last Spring, which is normally our largest fund raiser of the year, and we just had to cancel the Capital Steps concert planned for October, which we thought would be our largest fund raiser for this fiscal year. As a result, we must be very careful how we spend Friends money this year and next year.

I would like to set up a Zoom call to go over your proposed budget. I found the zoom call and the resulting budget proposal for this past summer to be very helpful. Please be prepared to discuss the specific programs you wish to run with Friends sponsorship, along with a proposed budget for each of them. Please let me know your availability this week or early next week so I can coordinate the meeting with Laura.

Stay Well,

Alice

Sent from Outlook

--

Amy Stimac

**From:** [Green, Esme](#)  
**To:** [Goodnow Library Trustees](#)  
**Subject:** FW: 2020-2021 Budget  
**Date:** Thursday, September 10, 2020 12:31:13 PM

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#7

FYI.

**From:** Alice Levine <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)>  
**Sent:** Thursday, September 10, 2020 11:45 AM  
**To:** Amy Stimac <[astimac@minlib.net](mailto:astimac@minlib.net)>  
**Cc:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>; Nicolazzo, Lily <[Nicolazzo@minlib.net](mailto:Nicolazzo@minlib.net)>; Ferrell Mackey <[fmackey@minlib.net](mailto:fmackey@minlib.net)>; Lee, Joanne <[jlee@minlib.net](mailto:jlee@minlib.net)>  
**Subject:** 2020-2021 Budget

Hi Amy,

I hope this find you and your family well. Here is the information regarding the programming budget.

The Friends met Tuesday night, September 10th and voted on the remaining 2020-21 budget ending June 30, 2021.

As your budget request is 10% higher than last year and the Friend's income is 50% lower, the Board approved level funding based on the 2019-2020 budget. The \$20,000 differential from the budget and our earnings will come from Friend's savings so that we can adequately support library programs.

The Friends are happy to approve \$15,000 to support children, young adult and adult library programming. We recognize how difficult it is during this pandemic year to understand how your programming will work. Per Amy's suggestion, and during this pandemic year only, you may shift the funding among line items.

The adult programming was cut because Joannes original budget was based on 12 months rather than the 10 months that we are working on. The summer programs that would normally be a part of a 12-month budget have already been funded. The board does not want to fund craft activity kits for adults. Adults taking courses at Adult Ed or at a Community Center are expected to pay or have their own supplies.

Please make sure to acknowledge our support in your programming material. As we have become much more active in social media, it would be great if we knew about your programming in advance so that we could also advertise.

Stay Well,

Alice

**From:** [Green, Esme](#)  
**To:** [Roughsedge, Anna](#)  
**Subject:** FW: 2020-2021 Budget  
**Date:** Thursday, September 10, 2020 3:12:35 PM

---

#8

Amy, Ferrell, Lily, Joanne, Karen and I had a long zoom meeting after we received this and there are some things I need to run by you...doesn't have to be now, but I don't want to forget.

We talked about how we can avoid using Friends money for supplies and creating a budget for them using state aid and trusts (if they ever get approved)—**I realize you may have some concerns about this so let's discuss.**

We also talked about only using Friends money for performers for whom we would write checks too, but I would also like to see if we can come up with a plan for adding **\*some\*** of them as town vendors. **I know it is a lot of extra work for you, so again, let's discuss!**

Finally, we have the museum passes. The Friends spend about \$7,500 a year on those. I am not sure what to do about that.

I think that if we can financially divest from the Friends over the course of this year, we can look to next year and the years after for revenue from our revolving funds. This year, obviously not so much.

I am meeting with the Foundation on Tuesday to discuss setting up a separate Memorial Gifts line for donations to go into that we can spend from on whatever we want.

UGH!!!! I'm sorry!

**From:** Alice Levine <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)>  
**Sent:** Thursday, September 10, 2020 11:45 AM  
**To:** Amy Stimac <[astimac@minlib.net](mailto:astimac@minlib.net)>  
**Cc:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>; Nicolazzo, Lily <[lnicolazzo@minlib.net](mailto:lnicolazzo@minlib.net)>; Ferrell Mackey <[fmackey@minlib.net](mailto:fmackey@minlib.net)>; Lee, Joanne <[jlee@minlib.net](mailto:jlee@minlib.net)>  
**Subject:** 2020-2021 Budget

Hi Amy,

I hope this find you and your family well. Here is the information regarding the programming budget.

The Friends met Tuesday night, September 10th and voted on the remaining 2020-21 budget ending June 30, 2021.

As your budget request is 10% higher than last year and the Friend's income is 50% lower, the Board approved level funding based on the 2019-2020 budget. The \$20,000 differential from the budget and our earnings will come from Friend's savings so that we can adequately



I'm Claudia Brandon, and I reside at 60 Balcom Road.

My role on the Board since 2009 has been producing adult and family programming, primarily for the Sunday Afternoons at the Goodnow Cultural Series. A sampling of the programs that I've brought to the library includes: a group from New York City who talked about South Korea and its history, and did a Korean wedding reenactment complete with a wedding banquet of Korean food. I've brought in Flamenco dancers with a Flamenco guitarist, Russian dancers, jazz trios, a trombone ensemble, string trios, Klezmer performers, classical pianists, cello and piano ensembles, re-enactors, authors, and visual artists. I've also brought in performers from the Boston Lyric Opera, an author/investigator who was an art theft expert and Director of Security and Chief Investigator at the Isabella Stuart Gardener Museum. We've even had programs where we brought in live kangaroos and owls to the joy of the many children accompanying their parents. We've also supported a summer movie series for several summers before the pandemic.

We've had good attendance. Typically, before Covid, a low turnout for the Sunday Afternoons series was 50 people, and attendance at our programs more often was 75 people and above. Frequently we filled the Community Room. Many of our programs use professionals and often we've needed to book them 3 to 7 months in advance. I've been supported in these efforts by Friends members who helped publicize the programs in our region, and who helped host and furnish refreshments to those in attendance.

I've researched and made a genuine effort to bring interesting and unusual programs to the Goodnow Library. Historically the Sunday Afternoon Cultural Series was created and carried out by the Friends. When I began my programming efforts it was my understanding that it was helpful to the Goodnow Library to have the increased traffic and attendance to enable additional financial support from the state. I was happy to help with this.

In addition to my efforts, other members of the Friends also created new programs. Deborah Norkin created and hosted a popular weeknight author series that included book signings. Abby Ward collaborated with the reference librarian to create a Cooking with Friends series. This was an earlier version of the current library cooking program. Publicity for these events and the Sunday Afternoon Cultural Series was done by the Friends publicity chair. She was assisted by a member of the Friends who created our flyers and by our social media volunteers who managed our website and Facebook and Instagram pages. This publicity was shared on the library website as well.

I was surprised when I learned in May of 2019 that the library director had issues with the Friends. As you know, we welcomed our current library director, as we had our prior library director, to come to our meetings and give a report. I sincerely wish in her briefings at our board meetings, that she would have informed us contemporaneously of the substance of her conversations about us at the Board of Trustees meetings. As it was, according to your minutes, our library director had been talking about us to you instead of talking about her concerns with

our board, as we unfortunately discovered when your minutes were uploaded months later in October, 2019, after our request to have them posted.

The handout you will receive shows communications that demonstrate our repeated attempts to respond to the Library Board of Trustees requests for meetings with the Chair of the Friends. I have also included at the beginning an email, dated January 3, 2019, that points to an understanding by a relatively new staff member that the library was looking at separating from the Friends, five months before May, 2019, when we first became aware that the library director had issues with our organization.

I will now turn our presentation over to Lisa Cornacchia.

## Summary of correspondence in support of Claudia Brandon's presentation:

In this handout, you will find 2 emails from the 2019 Reference Librarian Emily Trico. The first email implies an internal conversation between the Library Director and staff at the Goodnow Library prior to January 3, 2019. Emily Trico (Page 1, B) mentions her understanding that the library is looking at separating from the Friends in the context of confirming that programming invoices should still be sent to the Friends for reimbursement. Please note that January 3, 2019 is well before complaints regarding the Friends began. In the July 8, 2019 (Page 2, A) email the attitude encouraged at the library towards the Friends is evidenced.

Continuing through the handout, you will also see 3 e-mail threads regarding the Friends repeated requests for information regarding any issues and the Trustees inability to provide any answers. The first is a meeting that took place between Alan Gordon, Chair of the Goodnow Library Board of Trustees, Marie Royea, Susan Pettit and Friends Chair Alice Levine. After this meeting, where several hours were spent with Alice presenting the contributions of the Friends to the library, Marie submitted these notes (Page 3-4). Please note her final statement and her reasonable solution which was not followed. The second e-mail thread is in regard to a requested summer meeting with Alice Levine and Susan Pettit to include the Town Manager, the Library Director, a member of the Board of Selectmen, and Alan Gordon (Page 5, D and Page 8, D). This thread includes an email response from Susan Pettit (Page 5, C) as well as an email sent to the Town Manager by Alice Levine (Page 7, D), requesting information and including her phone number. You will see there is no response to Alice, although Alan Gordon encourages the Library Director and the Town Manager to call Alice (Page 7, A). The third e-mail thread begins with Alan Gordon's email (Pages 13-19) of an excerpt from the chapter from the book, The Good, The Great, and the Unfriendly by Sally Gardner Reed. The pages sent were from the chapter "When Friends Go Rogue." We are including pages (Pages 20-22) from the chapter that were not shared with the Friends that outline how to "Get a Divorce From Your Friends." The Friends reply again, asking for a description of the issues and who is raising them (Page 12, C). In a conversation between Alice Levine and Alan Gordon, on September 29, 2019, Alice was told by Alan Gordon to review the Trustees' minutes to discover the issues. Alice informed him that the minutes hadn't been posted since January 2019. The minutes were posted shortly after the conversation with Alan Gordon in October 2019. Alice refers to this conversation in her September 30, 2019 email to the Library Director and Alan Gordon (Page 23).

1

**From:** [Green, Esme](#)  
**To:** [Tricco, Emily](#)  
**Subject:** RE: Invoices  
**Date:** Thursday, January 3, 2019 3:01:32 PM  
**Attachments:** [Reimbursement Form.pdf](#)

A

I would request the money from the Friends. I believe there is money in the adult programming account. You can use this form for reimbursements, but for a check for a performer you can email the Friends treasurer, Laura Dowling. Include when you need it by, who it should be made out to, and the amount. If you have an invoice, you can send it too.

Laura's email is [Laura.Dowling@lantheus.com](mailto:Laura.Dowling@lantheus.com)

Sorry I took so long to get back to you—it's been hectic today!

**From:** Tricco, Emily  
**Sent:** Thursday, January 3, 2019 1:58 PM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Subject:** Invoices

B

Hey there,

For the programming invoices (ie. Ted Reinstein) who should I send those to? I know we were looking at separating ourselves from the Friends, so I didn't want to send it to them without talking to you.

Thanks!

**Emily Tricco**

Head of Reference Services

Goodnow Library

21 Concord Road

Sudbury, MA 01776

[Triccoe@sudbury.ma.us](mailto:Triccoe@sudbury.ma.us)

(978) 440-5524

[goodnowlibrary.org](http://goodnowlibrary.org)

2

**From:** [Tricco, Emily](#)  
**To:** [Green, Esme](#)  
**Subject:** Claudia  
**Date:** Monday, July 8, 2019 4:02:44 PM

A

---

So I just met Claudia from the Friends...she seems less hag-like than the others. Do we like her? Should I meet with her on my own?

**Emily Tricco**

Head of Reference Services  
Goodnow Library  
21 Concord Road  
Sudbury, MA 01776  
[Triccoe@sudbury.ma.us](mailto:Triccoe@sudbury.ma.us)  
(978) 440-5524  
[goodnowlibrary.org](http://goodnowlibrary.org)

3

**From:** [Marie Royea](#)  
**To:** [Green, Esme](#)  
**Subject:** friends mtg  
**Date:** Thursday, June 27, 2019 1:14:12 PM  
**Attachments:** [Meeting with Friends of Goodnow Library June 6.docx](#)

A

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summary attached....Sorry it's late and the ground work with Melissa is for naught, but Alan tells me Dan Carty is on board?

I'm available by phone til 4:30 ish today, 10:30-2ish friday if you want to commiserate,

Marie Royea

978-443-7809

Meeting with Friends of Goodnow Library June 6, 2019

Alice Levine, Susan Pettit, Alan Gordon, and Marie Royea present

We four met so that the Trustees can better understand the Friends' mission from their perspective.

Susan and Alice detailed the support the Friends provide to the Library annually in the form of supplemental programs and supplies:

1. Movie License and 6 summer movie events
2. Museum passes
3. Sunday Afternoons at Goodnow
4. Author Speakers
5. Children's programs such as the train for 'Touch a Truck' day, entertainers, and special programs (volunteers also run some programs)
6. Funding for the Volunteer Luncheon (to which they mentioned they were not invited)
7. Funding for Staff Appreciation
8. Summer Reading Program materials
9. Fundraiser events:
  - A. Trivia Night- Last Friday in October
  - B. 3 book sales: 3 weeks of Community Room end of March/ beginning of April, < 1 week May/Jun with Senior Service Day, and 1<sup>st</sup> Fri and Sat in Dec
  - C. Membership Drive mid September to end of October which raises ½ their annual funds
10. Calendar requests are attempted one year in advance...calendar migration had hindered this?
11. They feel early access denials for entrance reflect negatively on the facility. This is a policy change that the Trustees approved to provide for more effective opening window for staff.
12. Total annual support runs from 30-45K depending on the needs and requests of the Library Director.

I came away with a few impressions:

Stale leadership has prevented agility in accommodating the changing landscape at Goodnow.

They feel unappreciated and taken for granted as they continue to support programs annually.

Better 'sharing' of prime support appeal calendar times needs to be found so the Foundation and Friends each have separate prime time spotlights during the year.

We did NOT discuss hearsay situations of egregious behavior. I think more detailed written expectations of all groups may alleviate misunderstandings in the future. Perhaps Holly, Alice, and Esme with 2 trustees as a working focus group so that everyone 'has a say' would be productive.

Marie Royea

25 June 2019

**From:** [Rodrigues, Melissa](mailto:Rodrigues, Melissa)  
**To:** [Carty, Daniel](mailto:Carty, Daniel)  
**Subject:** Fwd: Time to meet  
**Date:** Thursday, June 27, 2019 3:25:17 PM

---

5

A

Sent from my iPhone

Begin forwarded message:

**From:** "Green, Esme" <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Date:** June 27, 2019 at 3:20:37 PM EDT  
**To:** "Rodrigues, Melissa" <[RodriguesM@sudbury.ma.us](mailto:RodriguesM@sudbury.ma.us)>  
**Subject:** FW: Time to meet

B

**From:** Susan Pettit <[pettitsg@comcast.net](mailto:pettitsg@comcast.net)>  
**Sent:** Thursday, June 27, 2019 3:17 PM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Cc:** [alantgordon@comcast.net](mailto:alantgordon@comcast.net)  
**Subject:** Re: Time to meet

C

Esme,

Alice and I were surprised to receive your email about an upcoming meeting with Alan Gordon, Melissa Rodriguez, and Jay Carty. As you know the Friends are an all volunteer board, and we do not meet over the summer. Our next board meeting is Tuesday, September 10, 2019. Alice and I are both busy this summer, but if you have questions that need to be answered in the meantime, we would be happy to respond by email.

Have a good summer,  
Alice and Susan

D

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

From: "Green, Esme" <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
To: "Rodrigues, Melissa" <[RodriguesM@sudbury.ma.us](mailto:RodriguesM@sudbury.ma.us)>; "Carty, Daniel" <[cartyd@sudbury.ma.us](mailto:cartyd@sudbury.ma.us)>; "Alan Gordon" <[alantgordon@comcast.net](mailto:alantgordon@comcast.net)>; "Alice Levine ([alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com))" <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)>; "Sue Pettit" <[pettitsg@comcast.net](mailto:pettitsg@comcast.net)>  
Sent: 6/27/2019 1:34:22 PM  
Subject: Time to meet

Hi all,

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6

Following up on the plan to meet. Melissa and I are both away the first week of July, so I would like to offer times the week of 15-19 and if that doesn't work, we can look at the week after.

I can meet after 1 on Monday, July 8, anytime between 9-5 on Wed and Thu (July 10, 11), and after 11 on Fri, the 12<sup>th</sup>. If it helps to work outside of business hours for you, Dan, I am able to meet early mornings or evenings as well.

Thank you,  
Esmé

*Esmé E. Green*  
*Director, Goodnow Library*  
*President, MLA*  
978-440-5515  
[goodnowlibrary.org](http://goodnowlibrary.org)  
[www.masslib.org](http://www.masslib.org)

Personal pronouns: she/her/hers

7

**From:** [alanguordon@comcast.net](mailto:alanguordon@comcast.net)  
**To:** "Green, Esme"; "Rodrigues, Melissa"; "Carty, Daniel"  
**Subject:** RE: Time to meet  
**Date:** Tuesday, July 30, 2019 7:14:39 AM

A

Good Morning All,

She has left the door open to discussion. Give her a call.

Alan

B

**From:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Sent:** Monday, July 29, 2019 2:04 PM  
**To:** Rodrigues, Melissa <[RodriguesM@sudbury.ma.us](mailto:RodriguesM@sudbury.ma.us)>; [alanguordon@comcast.net](mailto:alanguordon@comcast.net); Carty, Daniel <[cartyd@sudbury.ma.us](mailto:cartyd@sudbury.ma.us)>  
**Subject:** RE: Time to meet

First, I don't think she is being truthful; she does know what this is about. Second, at the June meeting, Alan stated that there would be a follow up meeting with you to the one he and Marie Royea (another trustee) had to discuss concerns with the working relationship between the Friends and the library.

C

**From:** Rodrigues, Melissa  
**Sent:** Monday, July 29, 2019 1:59 PM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>; [alanguordon@comcast.net](mailto:alanguordon@comcast.net); Carty, Daniel <[cartyd@sudbury.ma.us](mailto:cartyd@sudbury.ma.us)>  
**Subject:** FW: Time to meet

D

**From:** Alice Levine <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)>  
**Sent:** Friday, July 26, 2019 6:55 PM  
**To:** Rodrigues, Melissa <[RodriguesM@sudbury.ma.us](mailto:RodriguesM@sudbury.ma.us)>  
**Subject:** Re: Time to meet

Hi Melissa,

Got your e-mail. I am not sure what this is about. Please call me. 978-443-1729. Thank you, Alice

Sent from Outlook

8

**From:** [Green, Esme](#)  
**To:** [Rodrigues, Melissa](#); [alanigordon@comcast.net](mailto:alanigordon@comcast.net); [Carty, Daniel](#)  
**Subject:** RE: Time to meet  
**Date:** Monday, July 29, 2019 2:04:23 PM

A

First, I don't think she is being truthful; she does know what this is about. Second, at the June meeting, Alan stated that there would be a follow up meeting with you to the one he and Marie Royea (another trustee) had to discuss concerns with the working relationship between the Friends and the library.

**From:** Rodrigues, Melissa  
**Sent:** Monday, July 29, 2019 1:59 PM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>; [alanigordon@comcast.net](mailto:alanigordon@comcast.net); Carty, Daniel <[cartyd@sudbury.ma.us](mailto:cartyd@sudbury.ma.us)>  
**Subject:** FW: Time to meet

B

**From:** Alice Levine <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)>  
**Sent:** Friday, July 26, 2019 6:55 PM  
**To:** Rodrigues, Melissa <[RodriguesM@sudbury.ma.us](mailto:RodriguesM@sudbury.ma.us)>  
**Subject:** Re: Time to meet

C

Hi Melissa,

Got your e-mail. I am not sure what this is about. Please call me. 978-443-1729. Thank you, Alice

Sent from Outlook

**From:** Rodrigues, Melissa <[RodriguesM@sudbury.ma.us](mailto:RodriguesM@sudbury.ma.us)>  
**Sent:** Thursday, July 25, 2019 4:18 PM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Cc:** Carty, Daniel <[cartyd@sudbury.ma.us](mailto:cartyd@sudbury.ma.us)>; Alan Gordon <[alanigordon@comcast.net](mailto:alanigordon@comcast.net)>; Alice Levine <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)> <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)>; Sue Pettit <[pettitsg@comcast.net](mailto:pettitsg@comcast.net)>  
**Subject:** Re: Time to meet

D

Hello all,

I know that summer is very difficult. I only have a few weeks left here in town and would love to be able to meet with you all before I head off.

I know we can continue to do such wonderful things together and would love to help collaborate that.

We are very lucky to have such wonderful volunteers and groups in town to help support our

9

mission.

I look forward to meeting with you and appreciate your help!

Best,

Melissa

Sent from my iPhone

A

On Jun 27, 2019, at 1:34 PM, Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)> wrote:

Hi all,

Following up on the plan to meet. Melissa and I are both away the first week of July, so I would like to offer times the week of 15-19 and if that doesn't work, we can look at the week after.

I can meet after 1 on Monday, July 8, anytime between 9-5 on Wed and Thu (July 10, 11), and after 11 on Fri, the 12<sup>th</sup>. If it helps to work outside of business hours for you, Dan, I am able to meet early mornings or evenings as well.

Thank you,

Esmé

*Esmé E. Green*  
*Director, Goodnow Library*  
*President, MLA*  
*978-440-5515*  
[goodnowlibrary.org](http://goodnowlibrary.org)  
[www.masslib.org](http://www.masslib.org)

Personal pronouns: she/her/hers

**From:** [Green, Esme](#)  
**To:** [Carty, Daniel](#)  
**Cc:** [Rodrigues, Melissa](#)  
**Subject:** FW: Friends Board Meeting on Sept. 10th  
**Date:** Wednesday, September 4, 2019 4:49:51 PM

10

A

Hi Dan and Melissa,  
Just keeping you up to date on things. Melissa, I am sure you have one foot out the door, so do with this what you will! Esmé

**From:** Alice Levine <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)>  
**Sent:** Wednesday, September 4, 2019 2:01 PM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Subject:** Friends Board Meeting on Sept. 10th

B

Just wanted to let you know, the Friends Sept. board meeting will be an off site retreat for board members only.

We are beginning our Fall Membership Drive and have Sunday Afternoon programs scheduled for September, October and November. Trivia night is scheduled for Friday, Oct. 25th and we are participating in the Sept. 21st "Do Good Fair" at the library.

If you have any important information that we should know about, please e-mail me the information before the board meeting on the 10th.

Best,  
Alice

Sent from [Outlook](#)



**From:** [Green, Esme](#)  
**To:** [Alan Gordon](#); [Pryor, Barbara](#); [Whitlock, Beth](#); [Ingrid Mavvasi \(imavvasi@gmail.com\)](#); [Gordon, Lily](#); [marie.royea@gmail.com](#)  
**Subject:** FW: Friends Board Meeting on Sept. 10th  
**Date:** Wednesday, September 4, 2019 2:06:28 PM

---

**From:** Alice Levine <[alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com)>  
**Sent:** Wednesday, September 4, 2019 2:01 PM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>  
**Subject:** Friends Board Meeting on Sept. 10th

Just wanted to let you know, the Friends Sept. board meeting will be an off site retreat for board members only.

We are beginning our Fall Membership Drive and have Sunday Afternoon programs scheduled for September, October and November. Trivia night is scheduled for Friday, Oct. 25th and we are participating in the Sept. 21st "Do Good Fair" at the library.

If you have any important information that we should know about, please e-mail me the information before the board meeting on the 10th.

Best,  
Alice

Sent from [Outlook](#)

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**From:** [Green, Esme](#)  
**To:** [Alan Gordon](#); [Pryor, Barbara](#); [Whitlock, Beth](#); [Ingrid Mayyasi \(imayyasi@gmail.com\)](#); [Gordon, Lily](#); [marie.royea@gmail.com](#)  
**Subject:** FW: Reply to Your Email  
**Date:** Monday, September 9, 2019 11:06:26 AM

A

Hi All, here is the latest from the Friends. Alan sent them an email Friday which I will forward.

**From:** [alanlgordon@comcast.net](mailto:alanlgordon@comcast.net) <[alanlgordon@comcast.net](mailto:alanlgordon@comcast.net)>  
**Sent:** Monday, September 9, 2019 10:55 AM  
**To:** Green, Esme <[GreenE@sudbury.ma.us](mailto:GreenE@sudbury.ma.us)>; [marie.royea@gmail.com](mailto:marie.royea@gmail.com)  
**Subject:** FW: Reply to Your Email

B

I have a reply.

**From:** Susan Pettit <[friendsofgoodnow@gmail.com](mailto:friendsofgoodnow@gmail.com)>  
**Sent:** Sunday, September 8, 2019 9:13 PM  
**To:** [alanlgordon@comcast.net](mailto:alanlgordon@comcast.net)  
**Subject:** Reply to Your Email

Dear Alan,

C

We have received your email.

Please send us an email describing the issues you referenced and who is raising them.

Thank you,  
The Board of the Friends of the Goodnow Library  
Alice Levine  
Susan Pettit  
Laura Dowling  
Lisa Cornacchia  
Jo Travers  
Claudia Brandon  
Bethanne Hinkle  
Barbara Cook  
Mary Scott  
Lela Digenis

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**From:** [alanigordon@comcast.net](mailto:alanigordon@comcast.net)  
**To:** [alicelevine53@hotmail.com](mailto:alicelevine53@hotmail.com); [pattitsg@comcast.net](mailto:pattitsg@comcast.net)  
**Cc:** "Green, Esme"; [marie.royea@gmail.com](mailto:marie.royea@gmail.com)  
**Subject:** Board Retreat  
**Date:** Friday, September 6, 2019 8:52:51 AM  
**Attachments:** [Unfriendly Friends 1.pdf](#)  
**Importance:** High

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Hi Alice and Susan,

Esme forwarded your email regarding the Friends meeting on the 10<sup>th</sup>. I am sorry to miss the meeting, but I hope you have a very productive retreat.

I just wish that you had been able to meet with Melissa, Dan, Esme and me before the meeting, as that would have provided you and the board with some important issues to consider. Fortunately, I have a short article that I hope you can share with your board. I found it very informative. While not all of the points apply to the current relationship between the Friends and the Goodnow Library, I think there is material that deserves your attention.

Please let me know if I can be of any assistance and I hope to meet with you soon.

Alan Gordon





## When Friends Go Rogue

IF YOU BOUGHT THIS BOOK AND WENT STRAIGHT TO THIS CHAPTER, I feel your pain! Luckily, most Friends groups are absolutely essential to the library; not only do they raise money for the library, they can also be ambassadors for the library, promoting its value throughout the community. They can provide tremendous help in a capital campaign (in fact, many Friends groups were established as a result of people coming together to help fundraise for a major building or technology project). The best Friends groups will contribute to the morale of you and your staff by being fond supporters of all you do.

But sometimes, Friends groups become quite unfriendly, and when this happens, it can be a terrible strain on your relations with them, it can deprive your library of much needed money, it can cause morale to drop, and it can cause a loss of sleep and worry over what to do. Almost always, the rift comes from personalities that make working out a functional relationship with them (or him or her) more an art than a science.

Because Friends groups are typically 501(c)(3) organizations, they are a totally separate entity from the library, and technically, you have no jurisdiction over them (although they can be restricted from using your name in the fundraising efforts if they are not helping the library—more

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on this later). This can make working with an unfriendly group even more difficult but not impossible! This chapter will address the most common types of problems libraries and librarians face with dysfunctional Friends, which include the following:

- Friends are secretive and unwilling to share their organizational and financial information with the library.
- Friends don't invite the library's administration to their meetings.
- Friends believe that, because they raise the money, they should decide how it is spent.
- Friends are withholding money for which the library has a legitimate need.
- Friends are opposing library policy and/or direction.
- Friends are giving their money to organizations or initiatives outside the library.
- Friends have become "clubbish" and follow their own agenda versus that of their mission.
- Friends' officers don't turn over, and they begin to think of the money raised as their own.

### **SECRETIVE FRIENDS WHO DON'T WANT YOU AT THEIR MEETINGS**

Many librarians believe that they are entitled to access Friends' documents and that Friends meetings must be open to the public. Sadly, bylaws are not public documents unless your state has nonprofit governing laws stating otherwise, and your state's open-meeting laws might not apply to nonprofits (they usually refer only to government agencies, which, of course, Friends groups aren't). This means that, when you ask for their records and their minutes or even ask to attend their meetings, they might have the right to refuse. One piece of information that is available to you (and might yield the information you need) is their 990 forms, which they have to file with the IRS every year to protect their nonprofit status. You can find your group's filings at <https://projects.propublica.org/nonprofits> or at [www.guidestar.org](http://www.guidestar.org).

How did it come to this? There could be a variety of reasons: Perhaps the previous director alienated the Friends, and they have decided that

in the future, they will keep the work to themselves to avoid any more unpleasantness. It could be that some of the Friends have decided that this is *their* group and that the library has too much influence on their decision-making—which is nonsense because they exist to serve the *library's* needs. Or—maybe they just don't like you!

So, what can you do? It's time to become their best Friend! Join them and make a membership donation. If they have open membership meetings, attend. Hold a potluck to thank them for all they've done for the library. Write an op-ed thanking them for the gifts they've made in the past. Try to personally befriend a member of their board who would be willing to be your spokesperson for more transparency. Ask them what more you can do to help their efforts.

If you have faced a brick wall in trying to get information from them, you should stop trying immediately and swallow your pride. It will take time (and hopefully a change in their leadership) for you to worm your way into their hearts, but if you can do so, you'll have gone a long way in improving relationships for the long term.

### **FRIENDS TO LIBRARY: "IT'S OUR MONEY, WE'LL DECIDE HOW IT'S SPENT!"**

OK, first of all, it's not really their money. They don't own it; they are stewards of it. But, try telling them that! Obviously, all gifts to the library should have final approval from the director or in the case of larger gifts, often the approval of the trustees. For a sample gift acceptance policy, see appendix C.

It's important for the Friends to realize that the library director is the one who knows what the library needs most. The Friends might want that marble bench outside the library (with their name inscribed on it), but the library director knows that what's really needed at this point are new laptops in the teen center. It's clearly a sad misuse of funds if the Friends get their way and an important need of the library goes wanting. For a chart of roles for Friends, directors, and trustees, see appendix D.

So how do you resolve this issue? You can start by including them in your short-term planning. Once a year, when your budget is being set for the following year, ask for time on the Friends' agenda to share with them what the year ahead is looking like. (If you are anticipating budget cuts—this is also a great time to rally them for advocacy.) Discuss with

your group the community trends that will impact library services. Do you have a population of people who are Vietnamese moving in? What will that mean for collection development and community programs? Are new families moving in, raising the number of children you'll be serving, and how will this impact youth services?

Explore the goals you have for the coming year with your Friends, and discuss how they can ensure that their contributions align with these goals. Let them have a chance to give input as well. This type of respectful once-a-year dialogue will help put you on the same page, and when you go to them for money for a new Vietnamese collection, they'll likely have the check waiting for you!

Bad things happen in a vacuum. It's important to include the Friends as you survey the year ahead and continue to keep them in the loop throughout the year. Be sure to have a gift acceptance policy in place so that when you say no to the marble bench, you have an objective policy to back you up. And finally, present the Friends with a wish list, so that rather than using their own imaginations about what the library needs most, they'll have a menu of items that *you* know are most needed.

### **FRIENDS HOLDING ONTO THE MONEY THEY'VE RAISED**

The first of two of the most common calls we get at United for Libraries is from Friends who say, "We never see the library director until she needs something. She treats us like an open checkbook and rarely even thanks us for what we do." The second call comes from library directors who lament, "The Friends are sitting on thousands of dollars that they say they are saving for a rainy day. It's pouring outside! How can I get them to release their funds?"

This scenario is a twist on Friends deciding how their money will be spent. It comes from a misunderstanding of what the library needs and why. As is always the case, communication is critical here. The problem once again is that Friends are breaching good faith with donors who believe that their money will be spent to help the library, rather than sitting in a bank account somewhere.

The best Friends groups (if they are not acting as a foundation whose role is to amass great amounts of money for future library projects) spend

nearly everything they make each year on the library (see appendix E). This annual spending provides the catalyst for fundraising in the following year. When the Friends have a close-to-zero balance in their checkbook, it creates an urgency for more fundraising.

So, how do you ask your Friends to give even more? This is a sensitive area because if they are giving *some* money each year, you could come across as ungrateful or, worse yet, greedy. I know, I know—this is not for you but for the library! If you don't even know how much the Friends have, that creates an even trickier problem—how much do you ask for to convince them to dig into their nest egg? Again, you can find their financial information from [guidestar.org](http://guidestar.org).

Once you know how much money they're holding onto, the next step is to develop a plan for your library of important services, facilities support, new collections, technology start-ups, and/or anything else you believe your library needs *right now!* If you don't want your Friends to pick piecemeal from your plan, you should tie it into one project; for example, if you don't already have a "makerspace" in your library, you could ask your Friends to provide the technology you need for such as space as a start-up. Most Friends (rightly) don't want to spend their money on items for which the funding authority should be paying as part of the library's basic services.

Another way to encourage the Friends to let go of that rainy-day fund is to ask for the money as a catalyst for future fundraising or library construction. Asking for the funds to engage a fundraising consultant or a building consultant is an excellent way to leverage their money into a big project and for them to be leaders at the beginning.

Excellent relations and communications are critical here as in all your relationships with your Friends. You might include with the types of requests already mentioned a discussion of how your Friends see themselves as supporting the library. You can let them know that best practices among the country's Friends groups are to spend most of their money each year so that when they go out to raise money in subsequent years, they have much more to boast about in terms of what they've recently sponsored. It will make the case for repeat donations, as well as for recruiting new donors/members. Show them the Fact Sheet (appendix E) from the national Friends organization. Sometimes (sad but true), it takes an outside organization to make the same points you've been making for others to finally listen.

## FRIENDS PUBLICLY OPPOSING LIBRARY POLICY AND/OR DIRECTION

It's true—some library Friends groups actually go out publicly to oppose the library policies and decisions. For example, there was once a California Friends group that started an active campaign to oppose the library's building plans. Incredible, right? The library board of trustees had received a perfect parcel of land (for free!) upon which to build a new central library. It was right in the geographic middle of the city's population growth (and projected growth according to the city's planning and zoning department).

The new location, however, meant a one- to two-mile drive from where the central library was currently located, which was basically in the old village of this bustling and growing city. The Friends leadership at the time also lived in the old village; they liked the convenience of getting to their library relatively quickly, and they worried about the building's future. So, in their own self-interest, they began making buttons, attending council meetings, passing petitions, and writing letters to the editor, making it clear that the Friends of the Library opposed the new building site.

We do live in a democracy, and one of our most cherished rights is freedom of speech. So, it's certainly OK to form a "Citizens Against the Library" group and oppose the plans under that moniker. It is *not* OK to use the Friends designation for this activity. Not only is it highly unethical, but it's most likely in violation of their bylaws as well, most of which include *supporting* the library in their mission statement and, therefore, could threaten their 501(c)(3) status.

Another similar but even more dastardly scenario happened a few years back. A Maryland city was in financial straits and, in an effort to consolidate resources, planned to close some underused neighborhood branches. I don't have to tell you, this did not go well with the neighborhoods targeted! So what happened? The Friends (the good guys) held their annual membership meeting to elect new officers. What did the angry citizens do? They began joining the Friends in legion numbers; then, they attended the membership meeting and wrote in their own candidates for the board. They staged a coup!

It worked, and once the new "Friends" board was installed, they immediately began to oppose the closings with their "Friends of the Library" designation. It was a brilliant plan, and as with the aforementioned case,

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it was an easier sell to the public—"Gee, even the Friends of the Library are opposed."

It is unlikely that a group this unfriendly would be amendable to your requests that they not use the Friends designation. You can point out that this puts the Friends' 501(c)(3) designation in jeopardy, but they are not likely to care because they have another agenda entirely. If you can't get these folks to back down willingly, you'll probably want to end your association with them entirely (see "Getting a Divorce from Your Friends" later in this chapter).

## FRIENDS OF THE LIBRARY SUPPORTING OTHER ORGANIZATIONS

It is most typically the case that the Friends bylaws reflect a singular purpose of supporting the library. Some, though, have included the phrase "the library and literacy" in their mission statement. If literacy is included, that opens the door for them to support other compatible but not directly related organizations in addition to or even instead of the library.

Partnerships for literacy are so very important, and that means it requires all hands on deck. The appalling rate of illiteracy and semi-literacy in America can certainly be viewed as the number one threat to our country. In an increasingly global and technical world, we simply will be unable to compete if we can't ensure that our children are successful in school. We know that targeting early childhood literacy is especially important.

As the library director, your job is to be involved or at least quite knowledgeable about the Friends' work with other literacy agencies, and you should highly encourage your Friends to work with library staff in creating meaningful partnerships for literacy and to fund those. If they call themselves "Friends of the Library," there should be library input, agreement, and involvement with literacy partnerships. If the balance tips to an organization that diminishes in any significant way their direct support for your library, you should discuss this with them. Perhaps they can reform as "Friends of Literacy," leaving the Friends of the Library title available so that you can start a new group.

Other than literacy (and then only if you agree and it's a part of their mission), the Friends should not spend their money on other groups and

organizations. Again, it's a breach of faith with their donors/members who believe they are supporting the *library* when they support the Friends, and it's likely outside of their mission. What to do? If you are unable to convince them to support only what they have nonprofit status to support (i.e., what's in their bylaws), see "Getting a Divorce from Your Friends" later in this chapter.

## IT'S OUR CLUB: DO YOU KNOW THE SECRET HANDSHAKE?

This is a fairly typical problem, and it can certainly contribute to the scenarios already mentioned. The group was founded years ago, and over time, the same five to ten (sometimes even less) people run it. They might do the usual things—like having a membership drive (for contributions only), holding a used book sale, maybe sponsoring a program or two, and supporting the summer reading and learning program.

This would be OK, except the group is aging out, and though you hear them complain that "they just can't seem to recruit new and younger members," they certainly aren't trying very hard to do so. They are very content with the group they have. They are very content with the work they do (and have done for ages). They circulate among the board positions—"Betty" serving as president this year and board member-at-large the next—and finally returning to the president's position once again. They don't hold membership meetings, and they don't try new things.

If you, too, are content with the group as is, maybe this isn't a problem for you—for now. The truth is, however, that we all age out eventually, and if the Friends aren't bringing in new members, the group could go away entirely in several years, leaving you to have to do the harder work of starting a new Friends group all over again (see chapter 1).

In addition, a cliquish Friends group is not engaging community in their group—a positive activity in its own right. They may even be sending out negative vibes (even unintentionally) that others are unwelcome in their group, and this could certainly impact their fundraising ability. Finally, most groups that don't grow and evolve over time fail to take on new initiatives and think differently about how they're structured and how they can raise even more money for the library. If the active group is small and ingrown, their ability to be strong advocates when you need them is hindered—they may not even be willing to advocate at all if it's not something "they've always done."

How can you convince them to open the doors to active new members? As with many of the remedies, you should be their strongest supporter. You should ingratiate yourself with them, and let them know how much you appreciate their work. You can let them know that they have created a strong legacy for the library that you are worried won't succeed them. You would hate to see all their wonderful efforts on behalf of the library diminished by not having succession planning in the mix of all they do. Let them know you are most willing to help with the recruiting effort.

Some groups become so small and clannish that they aren't raising the kind of money you know is out there. The problem is, because they are carrying the Friends of the Library title, you're hard pressed to start a new fundraising and support organization. What would you call this new group? How could this be done without confusing your community?

Once again, the answer may be that you have to let this Friends group go. If they are standing in the way of creating a robust grassroots fundraising environment for the library, they really aren't your "Friends." If you can't get them to change and grow, it might be time for the last unhappy step.

## GETTING A DIVORCE FROM YOUR FRIENDS

The time has come. You've tried everything—maybe even counseling (e.g., a facilitator or consultant), but the marriage between you and your Friends group is irretrievably broken. You might feel there is nothing else you can do except wait for them to end their volunteer activities as they move into a nursing home.

The truth is, there is something you can do, and, in fact, if your Friends group is dysfunctional and actually standing in the way of what could be a different, strong, robust, and engaging group, you actually have a responsibility to do everything you can to open the pathway for a new group to form. This isn't an easy or pleasant step to take, and you might get some negative feedback. You'll know when you're ready to take this step, and you won't be doing it alone.

First of all, if you have a governing board, you must discuss this issue with them (if you haven't already). Let them know what you've done to try to remedy the situation. It's likely they'll have some ideas as well and may be reluctant at first to take any drastic steps. Give them some time to get used to the idea of asking the Friends to disband. It's important that you do what you can to get your trustees on your page.



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## STRONG FRIENDS = STRONG LIBRARY SUPPORT

Governing boards have the authority and fiduciary responsibility to protect the library's assets. This includes the name of the library. Though your trustees do not have authority over the Friends (assuming they are a separate 501(c)(3) organization), they do have authority over who uses the library's name.

Once the decision has been made by the board to disassociate with the Friends, the board should send a "cease and desist" letter to the Friends' board for using the library's name. In addition, the board should write a letter to the editor thanking the Friends for past service and explaining in a clear, non-emotional way why the board is taking this action. If the library plans to work to develop a new Friends group, an invitation to new recruits asking new volunteers to contact the library director can be included in the letter to the editor. As mentioned before, there is likely to be some pushback, but if your reasons are solid, you need simply stand by them.

If you do not have a board or if your board is advisory only, you still have a path that you can take. In this case, you should meet with your direct supervisor—the city or county manager or the mayor. It'll be an easier course with a paid administrator, because he or she will be less worried about any political fallout such as a move might have.

A mayor or other elected official to whom you report will most certainly be concerned about political fallout. If this is the case with you, you will want to have solid evidence that extends over a year at least documenting conversations you've had, money they've collected for the library but have not released, and money they've spent elsewhere. Be sure to let the mayor know that you are planning to start a new group if this is the case, and you might even sweeten the effort with him or her by stating a monetary goal you believe a new Friends group could bring within the next three years—being sure the goal well exceeds what the Friends have given over the past three years.

If you are unsuccessful getting your board or your boss to take action on disallowing the Friends to use the library's name in your fundraising, you could consider instead starting a foundation or working with the foundation to engage more on the grassroots level. You might also consider starting a new group with a different name, but that would undoubtedly cause even more confusion among community donors. In the end, if you aren't able to secure authorization to send out the "cease and desist" letter, consider working with them as best you can, or even not working with them at all and put this relationship at the very bottom of your worry list.

Libraries across the country have been benefiting for years by wonderful Friends groups that want nothing more than to help make their library the very best it can be. They happily engage in fundraising activities, they promote and advocate for the library when needed, and they work hand in hand with the library administration in order to provide exactly what the library needs.

It seems true that the most high-functioning Friends groups have strong, visible support from the library. I believe that because Friends are so important, the library director should attend their meetings and functions. It will honor the Friends and show them that they are an important component for development, advocacy, community engagement, and library promotion.

No matter how hard you work, there may be times when—because leadership of the Friends turns over, or a former director neglected them, or for a myriad of personality problems—Friends become unfriendly. This can and does cause many headaches for the library director and can, in fact, cause poor publicity for the library when and if these dysfunctional relationships become public. In addition, these groups make it almost impossible to create a new high-functioning board when they hold onto their name as "Friends of the Library."

It's always best to take the time and trouble to mend poor relationships, but in the end, you might have to work to disband them. Understand that when this becomes the only option, it also becomes the best option. It is your responsibility to ensure that unfriendly groups don't remain Friends with you.

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**From:** [Alice Levine](#)  
**To:** [Green, Esme](#); [Alan Gordon](#)  
**Subject:** Trustee's Board Meeting  
**Date:** Monday, September 30, 2019 10:09:52 PM

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Hi Esme and Alan,

I chatted with Alan last night regarding the Trustees board meeting. Though I have asked Alan and Melissa Rodrigues exactly what issues the Trustees would like to discuss with the Friends, I have still not received an answer. Last Saturday I tried to ask Ingrid Mayasi and she told me it was not appropriate for her to speak to me. I will not be attending tomorrow's meeting. Alan should reply to the Friends through e-mail the specific issues of concern, with examples, that the Trustees have. After review, the Friends will invite Alan to one of the Friends board meetings to discuss the issues. Our October 10th board meeting is a meeting that is very full as we need to make sure that our upcoming Trivia Night is in order and so will not be a convenient meeting for Alan to attend.

Best,

Alice  
Sent from [Outlook](#)

## Steps Forward

12/6/22

My name is Lisa Cornacchia, and I reside at 10 Curry Lane. I've been a member of the Friends' group since 2017. My current role on the Board is as the clerk. Thank you for the invitation to the Board of Trustees meeting this evening. I appreciate the opportunity to come and speak with all of you.

I don't know anyone on the Board of Trustees except for Jean (whom I met during her time on the Friends' Board). I would like the opportunity to get to know all of you as neighbors as well as collaborators in supporting the Goodnow Library. As good neighbors, I am hoping we can work together to build trust, respect and good will.

When a breakdown such as ours has happened, trust is lost and once trust is lost, it is difficult to reestablish it. This is the challenge we face in coming before you, neighbor to neighbor, to work out together the changes needed to return the Friends to the library. To be successful, this must be a collaborative process without ultimatums and where both sides can be equally heard and all viewpoints acknowledged.

The big question is what is the plan to reintroduce the Friends back into the Library?

And, most importantly, what mechanisms are in place in order to sustain the relationships so history is not repeated?

In order for this to move forward in an authentic manner, all players (Trustees, Foundation, and Friends) should start with good and honest intentions to make these relationships work. We must keep the lines of communication open. We must treat each other with respect in order to rebuild trust and confidence. The bottom line is all of us love the Library and want to see it thrive as a community institution, as well as it being a vital vehicle for outreach to the community.

Here are some of our suggestions as to how the Friends, the Trustees and the Foundation can rebuild a fractured relationship.

- We propose to have a series of meetings between the Trustees and the Friends to work out the concerns between the two groups. We are looking to engage with the Trustees in a cooperative and collaborative manner, working together with honest communication and transparency.

## Steps Forward

12/6/22

- Once we work out the relationship with the Trustees, we propose meetings between the Board members of the Friends and the Foundation.
- We propose for the three groups to review each organization's mission and expectations to support the library. Identify the needs of each group to fulfill their responsibilities and be successful. Each organization is different and unique.
- We propose for each organization to assign one of their Board members to attend each other's meetings to ensure good relations and communications between the groups, and to deal with issues in an expedited and tactful manner. Past handling of minor issues has resulted in resentments and mistrust. Moving forward, we need to be constructive in communications and resolution of conflicts and to ensure transparency.

The Friends have been a vital part of the community since 1988. The Friends are a committed group of supporters who believe that a vibrant library makes a difference in the lives of the residents of Sudbury. Although the library receives core budget support from the town, the all-volunteer Friends organization has provided annual, supplemental financial support to the library for over 30 years. It is imperative that we come together in good faith to heal and rebuild the relationships to fulfill the short-term and long-term goals to support the Library and the contributions to our wonderful community.

I now turn closing comments back to Alice Levine.