Consultant Reports
MHLS Director's Association
Meeting of Friday December 6, 2013

Merribeth Advocate, Assistant Director

1. **Impact Survey – Advancing libraries through community insight:** At this point I have a list of over 40 MHLS libraries that would like to run this survey. At your next county meeting please discuss if in your county you are doing it at the same time as each other or not, and let me know. The survey is available now: http://impactsurvey.org/

2. **NYLA Library Assistants Program in MHLS Auditorium - Registration is Now Open:** This program will meet on three consecutive Tuesdays (Jan 7, 14 & 21) from 9am-4pm. The cost for the program is $215 for NYLA Members and $255 for NON-NYLA Members. All materials and lunch each day are included in the registration fee. It is focused on participants who ALREADY HAVE library jobs...particularly those with five or fewer years of experience, and covers the topics of Reference Services, Public Services & Technical Services. The full information about the program and registration at **http://tinyurl.com/m6sj2ep**.

3. **OverDrive Funds:** Circulation of OverDrive downloadable audiobooks & eBooks has increased 55% compared to the same time last year. To help meet the increased patron demand for materials and insure the library stays relevant to digital users, several libraries have contributed extra funds to the MHLS Digital Download collection of OverDrive downloadable audiobooks & eBooks. Most recently from Kingston Library, Beekman Library, Highland Public Library & Columbia County Libraries. These materials are shared with all MHLS library patrons - thank you! If your library would like to contribute funds there are several ways to do it:
   a. Contact Joan Kay in the MHLS Business Office at jkay@midhudson.org and ask her to invoice your library for the amount.
   b. Send a check to MHLS attention Joan Kay. Mark 'OverDrive donation' on the check.
   c. Purchase OverDrive digital materials thorough your own account, and OverDrive will bill you directly. Contact me at madvocate@midhudson.org to set this up for you.
   d. Individuals can make a donation for adding digital materials to the MHLS Digital Download collection by sending a tax-deductible check to the Foundation for Hudson Valley Libraries, c/o MHLS, 103 Market St, Poughkeepsie NY 12601. Mark 'OverDrive donation' on the check.

4. **2013 Annual Reports:**
   a. The 2013 Annual Report is due from each member library to MHLS on February 19.
   b. It will include new questions regarding <u>adult</u> summer reading programming in libraries.
   c. Hands-on Annual Report Workshops, designed for new Directors (and anyone else at your library who is new to working on the annual report) but open to all, are being held on January 23 & 29 at MHLS. Register through the MHLS online calendar.

5. **Recording of Webinar Available – Basic Library Law for Trustees**: Jerry Nichols introduces public library trustees to the critical laws and regulations that govern their library. Topics include the legal structure of libraries; the By-Laws and other critical documents; conduct of meetings and FOIL; policy fundamentals; trustee liability; and legal resources for trustees. http://www.nysl.nysed.gov/libdev/webinars/index.html.

6. **YSS Conference:** On April 4th the Youth Services Section of NYLA will be holding their 39th annual conference very close to us - at the Crowne Plaza in White Plains. The conference is titled Everything is New Every Minute: Full of Opportunities - registration information is available on the MHLS online calendar.

7. **Early Literacy Outreach:** 16 member libraries were awarded MHLS Early Literacy Outreach Mini Grants. Their projects include specific community outreach to parents/caregivers of children 0-5 years old who are not typical library users, and long term incorporation of early literacy components in their story times. As part of the stste-wide focus on early literacy, Beth Zambito from PPLD will conduct **workshops in 4 locations around the region in Feb/Mar that are open to all** library staff, volunteers and daycare providers. Beth is the Head of Youth & Teen Services at PPLD. She has

developed and conducted early literacy trainings based on ALA's Every Child Ready to Read, editions I & II, for daycare providers and library youth services staff throughout the area. Beth was recently selected to represent the Mid-Hudson Library System as its expert on early literacy in order to assist the NY State Library in the development of an Early Literacy Training Plan. Workshops will be posted on the MHLS online calendar.

8. **County Meetings & Advisory Committee Dates:** If you already know your county meeting dates for 2014, please email them to me now. We are in the process of scheduling all 2014 advisory committee meetings and do not what to schedule on top of you. The advisory committee meeting dates are expected to be included in the January DA packet.

Rebekkah Smith Aldrich, Coordinator for Library Sustainability

1. **Tax Cap**
    - 'Tis the Season… for reporters to look and see **which organizations reported to the Office of the State Comptroller that they would override the tax cap**. One article has already appeared locally (Poughkeepsie Journal). Be prepared with your talking points and brief your board and staff so they feel prepared in case community members have questions.
    - Of those libraries that have submitted their post-vote results survey to me - over 50% of libraries overrode the tax cap for FY2014.
    - [Yes I am repeating this one…*again*] **Tax Cap Reminder: All libraries that have _ever_ had a vote on their budget – yes, even 414 libraries that have not gone back out in the last few years - should be filing the Tax Cap Online Form.** If you cannot find your log-in information please call 518.473.0006. Reminder: the Allowable Levy Growth Factor for the 2014 calendar fiscal year is 1.66% (not 2%). To access the form: http://osc.state.ny.us/localgov/realprop/

2. **2014 Advocacy Day**: **Thursday, February 27th in Albany** – This is earlier than usual, and on a different day of the week. Requests for donations to underwrite the bus coordinated by the Ramapo Catskill Library System (RCLS) will be going out shortly to area Friends Groups, the letter will come from me as usual. Last year we were able to reduce the cost for attendees thanks to the generosity of the Foundation for Hudson Valley Libraries and area Friends Groups. Bus location stops are planned to be the same as last year – along the NYS Thruway at New Paltz, Kingston and Catskill. MHLS will once again take the lead in scheduling appointments will all area legislators.

3. **Greenbuild Conference:** I was privileged to attend the U.S. Green Building Council's annual conference, Greenbuild in November. This conference had over 30,000 attendees who are focused on building sustainable buildings, neighborhoods and communities. It was an inspiring event filled with hope and determination to make a better future for ourselves through sustainable choices in not only the built environment, but in all aspects of our organizations and the world. I learned many things related to **helping member libraries make good design choices in a building project that will help lower operating costs and improve indoor air quality** – from historic preservation to retrofits and new construction projects; new ways to approach green purchasing of things like office products; and how to break through the "cost barrier" of "going green." However the biggest point driven home for me is how **interconnected** almost everything we do is: the choices we make about our facilities, indoor environmental quality, procurement, programs and collections all are part of telling our story. **A sustainable future for your library depends on making sustainable decisions throughout your library.** I'm anxious to share many of the things I learned but thought I'd start with just one key thing that is highly relevant right now:
    - **Libraries have a role to play in the "resilient design" movement.** A major buzz phrase around the conference was "resilient design." Multiple sessions focused on methods to pursue to make buildings, neighborhoods and communities more resilient in the face of extreme weather (Superstorm Sandy/Hurricane Irene) and terrorism. In the largest of these sessions, a room filled with design and construction professionals (over 500), the following principle was ranked #1 out of 10: "***Social equity and community contribute to resilience.*** *Strong, culturally diverse communities in which people know, respect, and care for each other will fare better during times of stress or disturbance. Social aspects of resilience can be as important as physical responses*." **We are part of both the social and physical, perhaps the most perfect blend of the two.** If conversations are happening in your community around the concept of "resiliency" be sure the library is

represented at the table. If this conversation is not happening in your community, maybe it starts at your library… To see all 10 resilient design principles visit http://www.resilientdesign.org/the-resilient-design-principles/

4. **Essential Documents Inventory – coming in 2014 – really!** Given the major overhaul and expansion of the inventory of documents in the new version we're double checking all items already submitted to ensure we do not create unnecessary work for you. Many libraries had items that were not originally on the list but now are so we want to make sure the new inventory reports match up with what you have already sent in. We estimate we can wrap that portion of the project up by the end of January and get the new inventories to you then. Just in time to start your 2014 "to-do" lists!

5. **Law Enforcement Inquiry policy:** The Marlboro Library recently had a town police officer request information that is protected under NYS Civil Practice Laws and Rules section 4509: Confidentiality of Library Records. This event serves as a great reminder to us all that every library should have a law enforcement inquiry policy to ensure all staff understand what to do when faced with a request. While a natural reaction may be to help the police officer, we have a responsibility, by law, to uphold patron confidentiality. Samples of this policy are available at midhudson.org. The Patterson Library has a particularly good policy which addresses all types of paperwork that might be presented.

6. **NYLA Restructures Organizational Dues:** The New York Library Association is our voice in Albany, *"they" are "us."* My own perspective has been that the good they do in advocating on our behalf justifies the cost of membership but in addition to their role as chief library advocate in NY they provide a long list of continuing education and professional development opportunities that any library can benefit from. If your library is not an organizational member, January will be a great time to join. At the organizational meeting in September the NYLA membership **voted to restructure membership dues to make them more affordable for small libraries.** Libraries, with budgets under $50K will see a reduction in their dues rate, from $100, to $50. Libraries, with budgets between $50K - $100K will see a reduction in their dues rate, from $100, to $75. Libraries with budgets over $3M will see an increase in dues. With the new organizational membership, libraries will receive a block of individual memberships for assignment to individuals at their organization. The number of 'associate' memberships is determined on a sliding scale based on the library's budget. One individual will be named as the organization's designated representative, serve as the primary contact for the membership, and the primary section chosen by this individual will receive a dues allocation of $20. These bundles of associate members are intended to serve as an offset for the increase in dues for larger libraries. For more information please visit:
http://www.nyla.org/max/4DCGI/cms/review.html?Action=CMS_Document&DocID=948&MenuKey=membership

Robert Drake, Information Technology Coordinator

E-Rate Funding Year 2014 - December/January Tasks

1. **Find your Free/Reduced Lunch Eligibility & Discount Percentage**
   - http://portal.nysed.gov/pls/cn_port/mel3_pkg.elig_enroll_search
   - Fill in either County or District, select Claim Period October or November or December. Select School under Public.
   - Find the school district that covers the location of your library and note the value under TOTAL.
   - Match this value against the discount matrix: http://www.sl.universalservice.org/reference/dmatrix.asp
   - Rural/Urban is decided per county and is further explained here:
     http://www.usac.org/sl/applicants/step04/urban-rural.aspx
   - Currently, Ulster, Greene, and Columbia counties are considered RURAL

- Currently, Dutchess and Putnam counties are considered URBAN
- This discount percentage multiplied by the your telecom and/or internet expenses is the amount you may receive from the E-Rate program

2. **Choose whether or not to proceed with E-rate application**
   - Phones are the easiest to apply for and remain eligible for funding 2014.
   - Internet service reimbursement is also a priority 1 service and relatively easy to apply for but requires filtering

3. **If moving forward, complete form 470**
   - Review deadlines
   - http://www.usac.org/sl/tools/deadlines/default.aspx
   - Fill out Form 470. Deadline is expected to be February 26th. Do it well before this!
   - All forms can be found at: http://www.sl.universalservice.org/menu.asp
   - If you would like direct assistance, please contact rdrake@midhudson.org and we can schedule a time to go through the application together (please assume 90 minutes).
   - If you have individual questions, feel free to email me as well.
   - Do not complete form

   Form 470/471 Resources

   - Further Instructions for form 470 can be at: http://www.usac.org/_res/documents/sl/pdf/forms/470i.pdf
   - If you do not know your entity number, you can search for it here: http://www.sl.universalservice.org/Utilities/BilledEntitySearch_Public.asp
   - If you do not know the SPN numbers of your telephone and internet providers, you can find that at: http://www.sl.universalservice.org/Forms/SPIN_Contact_Search.asp

   Other Resources
   - E-Rate Listserv: http://www.e-ratecentral.com/subscribe.asp
   - USAC Submit a Question - www.slforms.universalservice.org/EMailResponse/EMail_Intro.aspx
   - USAC Glossary and Acronyms: http://www.usac.org/_res/documents/sl/pdf/handouts/SL-Glossary-of-Terms.pdf
   - E-Rate Eligible Services List: http://www.usac.org/sl/applicants/beforeyoubegin/eligible-services-list.aspx

Year-End Technology Tasks: As the year comes to the end, there are a handful of tasks that each library should consider.

- Update your technology inventory and other network documentation:
  Each library should create/update an inventory of their computers, printers, passwords, and software licenses. A sample inventory can be found at: http://mhls.info/tech-documents/

- Check Domain Name Renewal:
  If your library has purchased a domain name for your website, you should check with your registrar if it needs to be renewed in the coming year. If you need assistance with this, MHLS can check when your domain is coming for expiration. I will be sending out reminders for the domains I know about after January 1.

- Consider Computer/Equipment Replacement for Coming Year
  Mid-Hudson recommends that all libraries follow a five-year replacement schedule for their staff and public computers. Generally any new computer you might purchase would be acceptable, however we currently recommend:
  - Windows 7 Professional Operating System
  - Intel I Series (i3,i5,i7) Processor or AMD equivalent

- 4gb+ of RAM
- 100gb+ of Hard drive space

As mentioned a number of times before, support for Windows XP is ending.

Once again: here is MHLS standardized purchase order:
- Standardized Order Form http://midhudson.org/department/computer/2013SOF1.docx
- Description of Equipment http://midhudson.org/department/computer/2013SOF2.docx

Eric McCarthy, Automation Coordinator

Cataloging

1. **Part-Time Cataloging Position**
   The MHLS cataloging department is actively seeking resumes for a part-time cataloger. The position performs duties related to bibliographic maintenance to ensure database records are complete, up-to-date, and accurate. Please forward resumes to jobs@midhudson.org.

Sierra/OPAC

1. **Compact Browse/Glacial Display:**
   The compact browse and glacial display options in Sierra will give the user a look that more closely resembles the look and feel of the Millennium display, only including the facet term narrowing feature. Let me know if you are interested in using either one of these display options or testing it on one of your accounts.

2. **Due Slip Disallowed**
   Several libraries made a request to disallow date due slips. After testing we have found that this is possible and if any other libraries would like to permanently disallow due slip printing, get in touch and we can make the changes necessary to make this happen.

3. **Demand for Web Management Reports training and Create Lists training**
   One additional date has been added for the Web Management Reports training in Columbia County (1/21) and I am looking at an additional date for Create Lists training in Ulster County. I will be adding additional dates for these trainings to meet additional demand. If you feel like your library would like to host a workshop, please get in touch.

4. **TNS**
   We experienced issues regarding the automated telephone notification system on 11/14 and 11/15. These problems have been resolved and we are working on a solution to minimize any further problems with the system. We apologize for any inconvenience.

5. **Knowledge Base**
   All documentation related to the ILS and related procedural documents have been moved to kb.midhudson.org, including those related to Web Management Reports, WAM reports and Overdrive statistics. In addition, and for a limited time, you can continue to use midhudson.org. The link "Old Millennium Guides" has all the ILS documents in one place. Ultimately new documentation will only be updated on kb.midhudson.org. If you have any questions regarding the site, please get in touch.

6. **Clearing Holdshelf**
   It is important to run the Clear Holdshelf function as frequently as possible. Not running this function can cause problems with the statuses of records, in addition to delaying the wait for another patron. The Clear Holdshelf documentation can be found on the knowledge base here: http://kb.midhudson.org/clearing-hold-shelf/.