

**Consultant Reports**  
**MHLS Director's Association**  
**Meeting of Wednesday, October 3, 2012**

**Merribeth Advocate, Outreach & Education Coordinator**

**1. OverDrive:**

- a. **Circulation:** This summer, circulation of eBooks and audiobooks averaged over 7,860 checkouts per month. At this point eBook checkouts in the MHLS Digital Downloads webpage at <http://mhls.lib.overdrive.com> are already double what they were in all of 2011, and downloadable audiobook checkouts are continuing to rise as well. In the past 12 months items in this 'Virtual Branch' circulated 74,188 items!
- b. **NEW - OverDrive Read: See Book – Read Book:** Many of the EPUB titles in the collection have a little  'sample' button below the book cover that now uses browser-based eReading technology so patrons can click and read the samples with no downloads, device activation or software installation required. OverDrive tells us that by the holidays this technology will be applied to all the EPUB books in our collection – patrons will be able to read the full book this way from any web-connected device. This will not change the number of available copies or holds in the collection, nor will it eliminate the need for user authentication. OverDrive Read broadens and deepens reader engagement and title discovery.
- c. **Help Resources:** The vast majority of patrons need no help with OverDrive. When there are problems, we find the most common pitfalls for patrons are:
  - i. They either do not have a PIN in Millennium or they have forgotten it – the PIN the patron needs in OverDrive is the same PIN they use in Millennium.
  - ii. They owe more than \$10 on their library card or have an expired card – Circulation is authenticated through Millennium and follows the same parameters (patron cannot check out if card is expired or owes over \$10).
  - iii. They have never downloaded before and are unfamiliar with how to start. This is when you point them to the great OverDrive Help interface, accessed by clicking the 'Help' button in the top tool bar of the MHLS Digital Downloads webpage at <http://mhls.lib.overdrive.com>. OverDrive Help has great "Getting Started With..." help, and is customized for the users computer or device.

**2. Correctional Facility Library Update:**

- a. In August alongside Cassie Artale and Mary Beth Farr from DLD, I spoke at a two-day statewide training session at the Albany Training Academy to all NY correctional facility librarians. Issues/topics discussed at the conference included:
  - i. Importance of the correctional facility library appearance and 'curb appeal'.
  - ii. Extending the library beyond the 4 walls of the library room.
  - iii. Building collections that reflect the needs of the correctional facility community.
  - iv. Services from public library systems to correctional facility libraries.
  - v. Ways correctional facility libraries can promote their value to their facilities.
  - vi. Input from correctional facility Program Directors (ex: transitional services, substance abuse treatment services, education, etc...) on what information, resources and materials they would like to see in the correctional facility library.
- b. In September MHLS hosted the annual Southeastern Region Correctional Facility library meeting which was attended by 14 area facilities. At that meeting we said goodbye to RCLS Outreach Coordinator Leslie Riley who is retiring, and welcome to Elena Falcone, the new Outreach Coordinator at Westchester Library System.

**3. Annual Reports:** Each year DLD asks in your annual report for the total number of reference transactions and total number of library visits during the year. This is something you can prepare for now.

- a. **Counting Reference Questions:**

- i. If your library does not count every reference transaction through the year, it is recommended that you make an estimate based on a typical week in October. A “typical week” is a week in which the library is open its regular hours, is neither unusually slow nor unusually busy, and containing no holidays/special events.
  - ii. Include in the count all information contacts that involve the knowledge, use, recommendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The term includes information and referral services. The request may come from an adult, a young adult, or child in person, by phone, by fax, by mail, or by electronic mail.
  - iii. Do not include in the count directional transactions or questions of rules or policies. (Examples of directional transactions are “Where are the children's books?” and “I'm looking for a book with the call number 811.2G.” An example of a question of rules or policies is “Are you open until 9:00 tonight?”)
- b. Counting Visits:**
- i. If annual counts are available, please report them. Otherwise, provide an annual estimate based on a count taken during "a typical week". If you have a “typical week” count, multiply the count by 52 weeks to report the annual count.
  - ii. A “typical week” is a week in which the library is open its regular hours, is neither unusually slow nor unusually busy, and containing no holidays/special events. It is seven consecutive calendar days, from Sunday through Saturday, or whatever days the library is open during that period. Please report all figures for the same week, if possible. It is recommended that libraries take a count during a typical week in October.
  - iii. •Report the total number of persons entering the library for whatever purpose during the year. Include persons attending activities, meetings, program sessions, and those persons requiring no staff services. This is an annual attendance total.

## Rebekkah Smith Aldrich, Coordinator for Library Growth & Sustainability

### 1. Albany Update

#### a. Tax Cap

- i. **Tax Cap Compliance Timing Issue:** To follow up on my report from last month, I am working with others in the state to clarify this and recently discovered that a library in another part of the state has received written confirmation that using the override mechanism to cover the library when your vote/budget approval timeline is out of sync with the OSC filing deadlines is acceptable. This ruling has been shared with NYLA and DLD and I am hoping it will become part of the OSC answer database. ***This could alleviate the need to change vote dates.*** Stay tuned...
  - ii. **Webinar for Libraries with a Calendar (January-December) Fiscal Year:** October 11, 2:00-4:00pm. Reserve your seat now at: <https://www3.gotomeeting.com/register/693913142>
- b. **New Law:** An amendment to New York's Penal Law was signed into law to punish people for knowingly accessing a Web site with the intent to view child pornography. Prior to the law being signed, accessing images under certain circumstances did not constitute "possession," thus preventing prosecution.
- c. **NYS Attorney General Meeting:** Earlier this year I reported that a contingent from NYLA were meeting with the NYS Attorney General to discuss the treatment of libraries by publishers in relation to the sale and pricing of ebooks. Basically, the AG staff said there is not a case to be made. From NYLA Executive Director Jeremy Johannesen: *“The representatives of the Antitrust Division were supportive and sympathetic, but reported that there is nothing about the publishers’ assorted policies on e-content with regard to libraries that is in violation of the law. The law does not require that any*

*company do business with any other entity (with the exception of protected classes, of which not include libraries)."*

- d. **Just a friendly reminder to keep your eyes and ears open during the coming month as legislators promote themselves before Election Day.** Many libraries may be represented by new people starting in 2013 and it will be good to know what their hot button issues and messaging looks like before we go and meet them! BTW: **2013 Library Advocacy Day is March 5!**

## 2. **Building Your Base Project Updates**

- a. **Leadership Development Series with Sandra Nelson:** Twenty-six member library directors attended the first session of the Series and are currently working on projects to build up collaboration in their libraries. Directors received some very practical advice on communicating with staff and trustees and were challenged to articulate their vision for their libraries in the future. The projects directors have submitted so far include working on **developing a shared vision amongst internal stakeholders to aid in moving their organization forward together, optimizing face time with trustees at board meetings, creating trustee orientation programs for their libraries, staff team building and more!** Very exciting stuff!
  - b. **BYB Online**
    - i. **"10 Things" Get Together:** All current participants and graduates from the first session of 10 Things are invited to an **in-person get together in the MHLS Auditorium on Wednesday, October 17<sup>th</sup> from 10:00am-12:00pm.** If you combine the graduates with our current group of participants that's over 100 people who are now able to share their experiences learning about social media, ebooks and so much more thanks to this program.
    - ii. **Social Media Policy Development Assistance** is now available on the MHLS *Sample Public Library Policy & Policy Development Tips* web page. There you will find policy development questions to ask yourself as you develop your policy, sample policies as well as staff considerations for your library as you amp up your online presence beyond your library's web site. Check out these new resources at <http://bit.ly/OZmaLX> I'd like to publicly thank Liz Anastasi, our intern over the summer, for her assistance we developed these resources for you.
    - iii. **Liz Anastasi** has been hired as a temporary employee to help finish up the good work begun over the summer to create screencasts to help member library staff learn common functions in Millennium as well as create how-to videos for the online catalog and MHLS Digital Download Center.
3. **Word-of-Mouth Marketing Experiment for the 4<sup>th</sup> Quarter:** MHLS Digital Download Center (OverDrive).
  4. **Next MHLS Friends Support Group:** October 24, 4:30-6:30pm. Topic: Publicity for your Friends Group – in person, in print and online.
  5. **Reminder: Roundtable for New Directors:** The next Roundtable for New Directors session will be a **hands-on workshop** on Millennium for Administrators. This event is designed for member library directors that have been in their positions for three years or less. It will be on Thursday, October 18<sup>th</sup> from 10am-12pm in the MHLS Auditorium.
  6. **A personal note:** Thank you for the patience and understanding so many of you have shown me over the past month as my family has dealt with the aftermath of my father's very serious bicycle crash. After three weeks in this hospital and rehab he is home and doing well. My schedule should be much less uncertain in the

coming weeks.

### **Robert Drake, Information Technology Coordinator**

1. **Transition:** If you have any questions about the transition please contact Eric or myself ASAP.
2. **Email Addresses @ YourLibraryURL.Org:** The Google For Education service offers free email accounts which can be set to *User@YourLibraryWebsiteUrl.com*. For all libraries with MHLS hosted websites, and most other libraries, we are able to help configure this service. If this is something you are interested in for your library, please contact me (after October 8/9<sup>th</sup>).
  - a. **Benefits**
    - i. Strong spam filters to block out unwanted emails
    - ii. Google's algorithms to search through email
    - iii. Mail filters can automatically label mail by source
    - iv. Easily accessible from your mobile phone
    - v. Other Google services are also available for free including Calendar and 25GB online storage via Google Drive
  - b. **Downsides**
    - i. Depending on the service, you may not be able to access prior emails sent to a different account
    - i. Depending on the service, you may not be able to retain your contact list.
    - ii. It will be necessary to update contacts with new emails
3. **E-Rate Grant Training – One More Reminder:** MHLS has worked with the Division of Library Development and E-Rate Central to schedule a Director Training in preparation for the next E-Rate funding year. This training will take place on October 30<sup>th</sup>. I encourage all libraries, even those not currently considering E-Rate to come to this training to gain a better understanding of the benefits and process involved. If you're interested in attending, please register as soon as possible.
4. **Intern:** Matt Reinhardt is interning with the IT department for a few months. He will be assisting us with the transition and other tasks.

### **Eric McCarthy, Automation Coordinator**

1. **Create Lists Workshops:** Five Create Lists workshops were completed in all five counties and sixty four total attendees.
2. **Teleforms:** A reminder that if you would like to use Teleforms (notification system using phone calls), please get in touch and I can get you a quote based on your population size.
3. **SSH/Telnet/Character-Based:** After the migration we will discontinue SSH access unless you have a special reason to use it. If you use SSH to check for bounced emails, let me know and we can adjust your notices so that bounced email notifications can be sent to the email address of your choice. We've tested this at several libraries and found that it works however some email programs will automatically send these to your spam folder. You would just need to make an adjustment to email settings to prevent this.
4. **Initials and Passwords:** Thank you to all libraries that have gotten in touch with me about updating your initial logins and passwords. I would like to have this all in place prior to migrating to Sierra in February. The password matrix I sent will help me set up all the necessary workflows so please use the template provided if

you haven't done so.

**5. Requests Limit:**

- a. The request limit of fifty items is now in place. I ran some numbers and we had sixty three patrons affected as of 21 September 2012.
- b. Patrons will not lose requests, they simply will not be allowed to request more until their request total is less than fifty.
- c. The message that is received upon placing number fifty one in the OPAC is: There is a problem with your library record. Please see a librarian.
- d. You will be able to override the request limit in the Millennium client in cases when you see a need.

**6. Server Migration:**

- a. Another reminder, on October 8<sup>th</sup> we will be migrating our server off-site. Millennium and the OPAC will be down all day. Please pay attention to the listservs in case we run into any problems. If you have not looked at the migration packet, please do so: <http://midhudson.org/transition>.
- b. I also want to thank all those libraries that worked on weeding item and patron records that did not need to migrate. That should make this process run much smoother.
- c. We don't expect any problems, however, if you find something isn't working correctly, please report it immediately so we can fix it. We will be working on Monday, testing links and troubleshooting installations. Please give us a call if you have any issues, and make sure to check the listserv first thing on Tuesday October 9 for the latest information.

**7. OPAC URL Change:**

- a. The OPAC URL will change to midhudsonlibraries.org from gigcat.midhudson.org. We will have a redirect in place, but if your patrons have saved PINs for gigcat, these will no longer work. Make sure all your frontline employees understand how to walk a patron through resetting their PIN. It is not possible to reset a PIN online if the patron does not have an email tied to their record.
- b. If you have used any permalinks on your Web sites or in brochures, those will change to midhudsonlibraries.org – there isn't a one-to-one redirect for these. Those links will go to the midhudsonlibraries.org home page. I have removed the current permalinks and will have the new links back up soon after the transition.