

Consultant Reports
MHLS Director's Association
Meeting of Wednesday, February 6, 2013

Merribeth Advocate, Assistant Director

1. **OverDrive LEAP Program Instituted:** We now have a new link on the left-hand navigation bar the MHLS Digital Download page at <http://mhls.lib.overdrive.com> giving patrons with print disabilities access to eBooks. Library eBook Accessibility Program (LEAP) is a partnership between OverDrive and Bookshare.org. The link directs patrons to apply for a Bookshare membership from our OverDrive-powered site. The accessible books will be provided by Bookshare to patrons enrolled in LEAP. OverDrive's role in the program is to **fully fund one year of membership for your qualifying patrons** (details on Bookshare.org: https://www.bookshare.org/_/membership/overview). There is no cost to MHLS or member library for this added feature.

2. **Annual Report Update:** The State Library currently anticipates that the online form will be open and available for data entry by mid-February. The due date will be adjusted accordingly. A full text version of the 2012 report form and instructions will not be available prior to the release of the online form. Please expect re-numbering due to questions added or re-ordered from the 2011 Annual Report to the 2012 Annual Report. MHLS will be able to send you the data we traditionally supply after we have seen the questions and instructions. When the online form is available we will send a message to the Directors listserv and post a link on the center section of midhudson.org
3. **Cancellations.com:** During recent bad weather I noticed that many libraries are using cancellations.com as a way of broadcasting weather related closings. If you are not yet using this free service, you can register your library at <http://www.cancellations.com/members/join.php?afid>= but don't wait till a storm to start the account as confirmation can take up to 24 hours.
4. **Continuing Education for Public Librarian Certification:** Public librarian professional certificates issued as of January 1, 2010 only remain valid when 60 hours of professional development are completed every five-year period. Even if this doesn't apply to you it may apply to staff in your library. Approved programs from accepted providers include formal classes or courses, workshops, seminars, lectures, institutes, webinars, e-courses, library conference programs, or other relevant programs. Curriculum that is **pre-approved by the employing library** can also fulfill the professional development requirement. Certificates or transcripts showing successful completion of courses are acceptable forms of documentation, **as are letters from a supervisor** indicating completion of a program or project. Full details at <http://www.nysl.nysed.gov/libdev/cert/conted.htm>
5. **Lynda.com:** I will have an update at the meeting on how you and your staff can access this web based training service for learning software, creative and business skills through MHLS.
6. **2013 NYS LSTA Summer Reading Program Mini Grants:** 2013 funds will be mini-granted to libraries for programs **collaboratively-planned** with schools that will increase the number of children **and families** involved in local summer reading programs **AND** foster school/library partnerships in support of "Summer Reading at New York Libraries". Libraries who submit applications that are rated successful by MHLS will each receive \$300-\$700 (a total of \$8,500 is available). Application available at <http://midhudson.org/program/SRP/2013application.doc>. **Applications must be received by April 11, 2013.** Libraries will be notified by April 18. You might find this list helpful: 'Tips for Developing a Successful Public

7. **Books for Kids:** This national organization promotes early literacy among all children with a special emphasis on disadvantaged youth. Additional information at <http://www.booksforkids.org/>. If your library has a local project to put books in the hands of this target group, they can be picked up at the Circle of Courage building in Poughkeepsie on 2/11 from 2-5pm (snow date 2/15). If you will be picking up books, please RSVP to Ellen Rubin at erubin@frontiernet.net

Rebekkah Smith Aldrich, Coordinator for Library Growth & Sustainability

1. **Governor's Preliminary Budget Released: The Governor's Proposed Budget holds library funding even with last year, retaining the 3% restoration gained during last year's legislative and advocacy season.** While not confirmed until after the next meeting of the NYLA Legislative Committee on the 14th, it is likely NYLA's budget priority will be to ask for a match to the proposed increase for education aid: 4.4%. **The \$14 million for library construction aid was included** in the Governor's budget.
2. **NYLA Advocacy Day, Tuesday, March 5th:**
 - MHLS makes **appointments** will all legislators for attendees.
 - **Bus** information is coming soon! Thanks to donations from area Friends Groups the ticket price is down to \$12 per library stakeholder (staff, trustee, Friend). I've heard a rumor that to encourage average, everyday patrons to attend the ticket price may be waived for them. We'll be adjusting the bus schedule this year to arrive earlier to hopefully get more library advocates into Meeting Room 6 when many legislators come down to have their "READ Poster" photo taken.
 - **Pre-Advocacy Day Events, Monday, March 4th:** Workshops – including Legal Issues Round-Up for Libraries! - and the New Yorkers for Better Libraries Political Action Committee's gala event are held in Albany the day before to get everyone revved up. The speaker at the PAC dinner will be **David Vinjamuri, the Forbes columnist who wrote the recent article, "Why Public Libraries Matter and How They Can Do More"**: <http://onforb.es/VJwBsU>
3. **State Legislators Update:**
 - Attached to my report is a **list of your representatives** in the NYS Senate and Assembly. All races are now final. There are now 15 legislators within the MHLS region, up from 13. FYI: This is more than any other System in the State.
 - **Committee Representation:**
 - Senate Library Committee: Senator Larkin & Senator Seward
 - Assembly Committee on Libraries & Education Technology: no area representatives. FYI: Micah Z. Kellner has been named chair of this committee. His district covers Manhattan's Upper East Side, Yorkville & Roosevelt Island.
 - Assemblywoman Sandy Galef has been named chair of the Real Property Taxation Committee
 - Assemblyman Kevin Cahill has been named chair of the Insurance Committee
 - **Local Meetings:** Many state legislators are holding open house/town meetings in their districts. Keep your eye out for these meetings and attend and talk with them about the importance of libraries in the lives of their constituents. Don't see a local meeting advertised? Reach out and offer to host their meetings at the library!

4. **Make the Ask:** While there are no official “member items”/“bullet aid”/special legislative grants from Albany we did see quite a bit of funding disbursed last year. Granted it was an election year, however, I’m recommending you let legislators know annually how they might be able to help your local library financially. Major capital projects, renovations and technology-related upgrades have been popular with legislators in the past. ***Please avoid your “ask” as your first communication with your legislator(s).*** If you have not met them or spoken with them in the past year, reintroduce yourself, reorient them to your library and remind them of your value to their constituents before mentioning your financial need.
5. **Upcoming Advocacy Related Training:**
 - **Advocacy Boot Camp** is a good place for directors, staff, trustees and Friends to get a basic understanding of how libraries and the System are funded, who key decision-makers are and message delivery tips.
 - Friday, February 15th from 10a-12p @Saugerties Library
 - Thursday, February 21st from 10a-12p @MHLS Auditorium
 - Thursday, February 21st from 6-8pm @Patterson Library
 - **Tell It Like It Is: Using the Power of Storytelling to Advocate for Your Library w/ professional storyteller Lorraine Harin-Gelardi** on Tuesday, February 19th from 6-8pm @Millbrook Library
6. **Planning a 414 Vote for 2013?** For Association and Municipal public libraries now is the time for your board to be seriously discussing whether or not they plan to pursue a 414 vote in November of 2013. If you have new trustees unfamiliar with 414 votes please feel free to share the publication: *“Inch by Inch, Row by Row: Implementing Chapter 414 of New York State’s 1995 laws, the “local votes law” for public libraries”* available online at <http://midhudson.org/trustee/414mhls.pdf>
7. **Construction Grant Application Cycle:** In March I’ll be sending out the “intent to apply” memo for the next round of Construction Grants. If your board has not recently updated the facility plan for your library, now would be a good time to do so to see if your timing and cash flow projections will match up with the next State Aid for Public Library Construction application cycle. If you do not have a prioritized facility plan let me know, I have a simple outline you can use to get one started.
8. **Gates Survey Due March 1st:** A short survey is being conducted on behalf of the Bill & Melinda Gates Foundation Global Libraries Initiative. *“The purpose of the survey is to help the Global Libraries Initiative identify opportunities to focus their current support of public libraries in ways that foster innovation and dramatically accelerate positive and lasting change in libraries throughout the U.S. and around the world.”* To fill out this short survey and help inform the Global Libraries Initiative, visit: <https://www.surveymonkey.com/s/W3DBZ96>. The Initiative will use this survey to determine which aspects of public libraries will lead to innovation and positive change in libraries around the world, and will then focus their attention on supporting these areas over the next three years. Previous grants from Gates have enabled MHLS member libraries to upgrade public access computers, train staff and upgrade broadband connectivity.
9. **Dutchess County:** Just a reminder that we’ll need a new representative from Dutchess County to the MHLS Marketing Advisory Committee. Our next meeting is in March. *“The mission of the MHLS Marketing Advisory Committee is to help guide the development of strategies and tools to strengthen member libraries’ ability to cultivate support amongst users and nonusers.”*

Legislators by Library

Library Name	County	Assembly	NY Senate
Chatham Public Library	Columbia	Steven McLaughlin	Kathleen Marchione
Claverack Free Library	Columbia	Didi Barrett	Kathleen Marchione
Germantown Library	Columbia	Didi Barrett	Kathleen Marchione
Hudson Area Association Library	Columbia	Didi Barrett	Kathleen Marchione
Kinderhook Memorial Library	Columbia	Steven McLaughlin * <i>* Stuyvesant: Peter Lopez</i>	Kathleen Marchione
Livingston Free Library	Columbia	Didi Barrett	Kathleen Marchione
New Lebanon Library	Columbia	Steven McLaughlin	Kathleen Marchione
North Chatham Free Library	Columbia	Steven McLaughlin	Kathleen Marchione
Philmont Public Library	Columbia	Didi Barrett	Kathleen Marchione
Roeliff Jansen Community Library (Hillsdale)	Columbia	Steven McLaughlin* <i>* Copake & Ancram: Didi Barrett</i>	Kathleen Marchione
Valatie Free Library	Columbia	Steven McLaughlin	Kathleen Marchione
Adriance Memorial Library - PPLD	Dutchess	Frank Skartados	Terry Gipson
Amenia Free Library	Dutchess	Didi Barrett	Terry Gipson
Arlington Branch Library - PPLD	Dutchess	Didi Barrett	Terry Gipson
Beekman Library	Dutchess	Kieran Lalor	Greg Ball
Blodgett Memorial Library (Fishkill)	Dutchess	Kieran Lalor	Terry Gipson
Clinton Community Library	Dutchess	Didi Barrett	Terry Gipson
Dover Plains Library	Dutchess	Kieran Lalor	Terry Gipson
East Fishkill Public Library District	Dutchess	Kieran Lalor	Terry Gipson
Grinnell Library Association (Wappingers)	Dutchess	Kieran Lalor	Terry Gipson
Howland Public Library (Beacon)	Dutchess	Frank Skartados	Terry Gipson
Hyde Park Free Library	Dutchess	Didi Barrett	Terry Gipson
LaGrange Association Library	Dutchess	Kieran Lalor	Terry Gipson
Millbrook Free Library	Dutchess	Kieran Lalor	Terry Gipson
Morton Memorial Library and Community House (Rhinecliff)	Dutchess	Kevin Cahill	Terry Gipson
NorthEast-Millerton Library	Dutchess	Didi Barrett	Terry Gipson
Pawling Free Library	Dutchess	Kieran Lalor	Greg Ball
Pine Plains Free Library	Dutchess	Didi Barrett	Terry Gipson
Pleasant Valley Library	Dutchess	Didi Barrett	Terry Gipson
Red Hook Public Library	Dutchess	Kevin Cahill	Terry Gipson
Staatsburg Library	Dutchess	Didi Barrett	Terry Gipson
Stanford Free Library	Dutchess	Didi Barrett	Terry Gipson
Starr Library (Rhinebeck)	Dutchess	Kevin Cahill	Terry Gipson
Tivoli Free Library	Dutchess	Kevin Cahill	Terry Gipson
Cairo Public Library	Greene	Peter Lopez	Cecilia Tkaczyk

Legislators by Library

Library Name	County	Assembly	NY Senate
Catskill Public Library	Greene	Peter Lopez	Cecilia Tkaczyk
D.R. Evarts Library (Athens)	Greene	Peter Lopez	Cecilia Tkaczyk
Greenville Public Library	Greene	Peter Lopez	Cecilia Tkaczyk
Haines Falls Free Library	Greene	Peter Lopez	Cecilia Tkaczyk
Heermance Memorial Library (Coxsackie)	Greene	Peter Lopez	Cecilia Tkaczyk
Hunter Public Library	Greene	Peter Lopez	Cecilia Tkaczyk
Palenville Branch of Catskill Public Library	Greene	Peter Lopez	Cecilia Tkaczyk
Windham Public Library	Greene	Peter Lopez	Cecilia Tkaczyk
Alice Curtis Desmond & Hamilton Fish Library (Garrison)	Putnam	Sandra Galef	Terry Gipson
Brewster Public Library	Putnam	Steve Katz	Greg Ball
Julia L. Butterfield Memorial Library (Cold Spring)	Putnam	Sandra Galef	Terry Gipson
Kent Public Library	Putnam	Sandra Galef	Terry Gipson
Mahopac Public Library	Putnam	Steve Katz	Greg Ball
Patterson Library	Putnam	Steve Katz	Greg Ball
Putnam Valley Free Library	Putnam	Steve Katz	Terry Gipson
Reed Memorial Library (Carmel)	Putnam	Steve Katz	Greg Ball
Clintondale Branch of Highland Public Library	Ulster	Frank Skartados	Cecilia Tkaczyk
Elting Memorial Library (New Paltz)	Ulster	Kevin Cahill	John Bonacic
Highland Public Library	Ulster	Frank Skartados	Cecilia Tkaczyk
Hurley Library	Ulster	Kevin Cahill	Cecilia Tkaczyk
Kingston Library	Ulster	Kevin Cahill	Cecilia Tkaczyk
Marlboro Free Library	Ulster	Frank Skartados	William Larkin, Jr.
Morton Memorial Library (Pine Hill)	Ulster	Kevin Cahill	James Seward
Olive Free Library Association (West Shokan)	Ulster	Kevin Cahill	James Seward
Phoenicia Library	Ulster	Kevin Cahill	James Seward
Plattekill Public Library	Ulster	Kevin Cahill	William Larkin, Jr.
Rosendale Library	Ulster	Kevin Cahill	John Bonacic
Sarah Hull Hallock Free Library (Milton)	Ulster	Frank Skartados	William Larkin, Jr.
Saugerties Public Library	Ulster	Peter Lopez	Cecilia Tkaczyk
Stone Ridge Library	Ulster	Kevin Cahill	Cecilia Tkaczyk
Town of Esopus Library	Ulster	Kevin Cahill	Cecilia Tkaczyk
Town of Ulster Public Library	Ulster	Kevin Cahill	Cecilia Tkaczyk
West Hurley Public Library	Ulster	Kevin Cahill	Cecilia Tkaczyk
Woodstock Public Library District	Ulster	Kevin Cahill	Cecilia Tkaczyk

Robert Drake, Information Technology Coordinator

1. Sierra Transition

See Erik's report for complete information.

Do note that on April 23rd (the day of the Sierra transition), SAM will not be able to process new computer users. Functionality should work normally, however new users will be required to use a visitors card pass until the following day.

2. E-Rate

February 14th is the last day you can file Form 470. March 14th is the final day you can file Form 471. See my previous reports for instructions on both of these forms.

DLD has provided additional clarification on what paperwork to retain, and the bidding process. For those not on this listserv, key details are listed below. The full article can be found at: <http://www.usac.org/sl/tools/news-briefs/preview.aspx?id=464>

Responding to questions from potential bidders

When completing the FCC Form 470, applicants must provide sufficient detail for a service provider to be able to formulate bids.

- For example, if an applicant posts for "local and long distance telephone service on 10 existing landlines," a service provider would probably not need more information in order to craft a responsive bid.
- On the other hand, if an applicant posts for "local and long distance telephone service for 10 new cell phones," the service provider would probably need information on the number of minutes that might be used, the likelihood that roaming charges would occur, and other information to craft a responsive bid.

Applicants – and consultants that act on behalf of applicants – should respond to bidder inquiries in a timely manner so that competitive bidding deadlines can be met. Not responding to a potential bidder can result in a compromised competitive bidding process which can result in funding denial.

Emails that can be identified as "spam" do not require a response – especially if the applicant has indicated in the FCC Form 470 and/or RFP a specific procedure or mechanism for submitting questions.

Rejecting all bids/canceling a procurement

If the applicant decides that none of the bids received is responsive and rejects all of them – or if the applicant decides to cancel the competitive bidding process for other reasons – the applicant must file a new FCC Form 470 to open a new competitive bidding process.

Considering all bids received

After the applicant has waited at least 28 days and the competitive bidding process has been closed, the applicant must carefully consider **all** of the bids received.

Applicants can use one or more factors in their [bid evaluations](http://www.usac.org/sl/applicants/step03/evaluation.aspx) (<http://www.usac.org/sl/applicants/step03/evaluation.aspx>), but the price of the E-rate eligible products and services must be considered a factor and must be weighted more heavily than any other single factor in the evaluation. If you need assistance constructing your evaluation documentation, there is a [sample bid evaluation matrix](#)

(http://www.usac.org/_res/documents/sl/pdf/samples/Bid-Evaluation-Matrix.pdf) on the USAC website for your reference.

After considering all bids, the applicant chooses the most cost-effective bid (i.e., the price of the eligible products and services is the most heavily weighted factor) and, if the services are not provided under tariff or on a month-to-month basis, can sign a contract and prepare to file the FCC Form 471. A complete discussion of evaluating bids can be found under [Applicant Step 3](http://www.usac.org/sl/applicants/step03/default.aspx) (<http://www.usac.org/sl/applicants/step03/default.aspx>) on the USAC website, and will also be addressed in a future SL News Brief.

Retaining documentation

Specifically, we recommend that you retain the following in your files (this list is not exhaustive):

- The FCC Form 470
- The RFP, if one is issued
- Questions from potential bidders and your answers
- Copies of winning **and losing** bids
- The final bid evaluation matrix and any supporting documentation
- The contract, if one is signed.

3. Sam Wireless Printing

The SAM Command PC installations are completed. Over the coming weeks, time allowing, I will be working with Comprise to get quotes on wireless printing. If you are interested in this product, please contact me so I have a rough count.

4. Windows 8

As mentioned over the Listserv, SAM does not currently work with Windows 8. They are planning on supporting it but do not have a committed deadline currently. Millennium and Sierra have been tested with Windows 8 and work without issue. Nevertheless, we recommend continuing with Windows 7 for the time being. Windows 7 Support is guaranteed to 2020.

5. Standardized IT Form - Repeating again, for those that missed it last month:

In order to assist libraries in purchasing equipment, we have created a standardized order form which can be found at the links below:

1. Standardized Order Form <http://midhudson.org/department/computer/2013SOF1.docx>
2. Description of Equipment <http://midhudson.org/department/computer/2013SOF2.docx>

For the coming quarter, these are the items (with prices) that we are able to purchase on behalf of member libraries. These prices include the cost of shipping and other fees. The form will be updated, as necessary, on a quarterly basis. Please note that the listed prices do not include the cost of an onsite visit for configuration.

When using this form please indicate the quantity of total price of equipment desired. Include payment with the form and send to the MHLS Business Office. Upon receipt, equipment will be ordered and you will be notified of the expected arrival date.

Eric McCarthy, Automation Coordinator

Sierra Training and Transition

1. **Scheduled Site Visits:** You should have been contacted regarding a site visit to load the preview Sierra database on your machine(s). Mid-Hudson will be conducting site visits starting Feb. 25th through April 1st and if you haven't been contacted, please get in touch with me. The topics covered will be focused on the differences between Millennium and Sierra in front-line circulation and linking items including:
 - All functions now being related to a unified client.
 - Logging in and accessing functions.
 - Changes made to offline circulation application.
 - Circulating materials.
 - Creating and updating patron and item records.
 - Linking and merging patrons.
 - Changes in notices.
 - Accessing printer settings.
 - Troubleshooting problems.

It is important that all directors, catalogers, and heads of circulation to be on-site during scheduled visits. **Please have tested the administrative passwords on your computers prior to visits. We will not be able to load software if we do not have these.**

2. **Licenses:** When using the Sierra preview desktop application you will be using one of your Millennium licenses. Keep this in mind if you get an "all ports in use" message.
3. **Off-Line Circulation:** Millennium and Sierra will be unavailable on the migration day (April 23rd). If you choose to remain open, Sierra off-line circulation will be available to you. We will install this application during the scheduled site visit.
4. **Days Closed:** I have configured the days closed table to reflect our migration date. We have had many libraries request to be closed both the day before and after migration and others to remain open. I will configure your preference in the days closed table.
5. **Initials:** I want to thank all the libraries that have worked with me getting this arranged prior to the migration. I have heard from most libraries already and I am working through all to configure these. If you have submitted your new initials to me and I haven't gotten to your library yet, please get in touch with me. When we migrate to Sierra I will make sure that the workflows and Macros are in place.
6. **Library Emails:** Many libraries have configured the branches table to receive bounced and replied to notifications. However some libraries still need to contact me about this prior to the transition. If you have not had this configured to reflect your library's email, please do. If you are unsure, give me a call and I can check.

Innovative

Laurie Shedrick will be our new sales representative for Innovative. Many of you already know Laurie as the former Automation Coordinator for Mid-Hudson.

Web Management Reports

There is a non-java based version of Web Management Reports available at <http://midhudsonlibraries.org/iii/webprt/app>