Consultant Reports
MHLS Director's Association
Meeting of Wednesday, March 5, 2014

Merribeth Advocate, Assistant Director

1. **Annual Reports:** Thank you to everyone who out time and effort into meeting the deadline. As we have talked about there has been more attention from the public on annual reports. We have just heard that NY library annual report results will be available to the public online soon, starting with the 2012 reports at NY's Open Data Portal.

2. **NYS Library Early Literacy Website:** The New York State Library is in the development phase of creating an interactive calendar website for families with young children. The calendar uses multimedia to enhance books, songs, and family health and educational resources and bring these various components to life.

Rebekkah Smith Aldrich, Coordinator for Library Sustainability

1. **NYS Budget Update:** We've been working hard in Albany over the past month. The Governor did not offer a restoration before the end of his 21-day amendment period which leaves things in the hand of the NYS Legislature. Early word from both the Senate and Assembly is that a restoration of at least $4 million is likely. This is very positive as usually only the Senate proposes restorations and we have to negotiate with the Assembly. We'll have the latest information for you at the DA meeting.

2. **NYLA Legislative Agenda:** All state level advocacy efforts are focused on full funding of library aid for now but we'll soon transition to pushing the pieces of legislation that the NYLA Legislative Committee has identified as priorities for New York's Libraries. Of particular interest to libraries in MHLS:
   - **Library Construction Aid & Matching Provisions (***S.6329 Farley / A.8732 Thiele***)**
     Retain current program guidelines on matching requirements to ensure libraries in economically disadvantaged areas are able to make needed capital improvements.
   - **Exempt Public Libraries and Library Systems from the MTA Payroll Tax (***S.1891 Martins / A.1665 Abinanti***)**
     Include libraries with educational institutions already exempt from the commuter tax. This impacts libraries in Putnam and Dutchess counties as well as MHLS. The Governor has allotted $1.3million to pay back this tax but that amount is not keeping up with the actual amount we're paying.
   - **EDC Study on Economic Benefits of Public Libraries (***S.5854 Farley / A.7666-A Kellner***)**
     Allows the Economic Development Corporation to conduct a study on the economic impact of public libraries and library systems in New York State.

3. **Property Tax Freeze Proposal:** As mentioned at the January DA meeting, the Governor is proposing a plan to freeze property taxes for two years in exchange for municipalities sharing services and abiding by the Tax Cap. I've been closely monitoring the state of this proposal to see if it has traction. So far it does not seem to be getting anywhere but efforts surrounding this may pick up once the state budget is finalized by April 1. I am working with NYLA's Government Relations staff person, Mike Neppl, to stay on top of this issue. Here's why you should be paying attention to this: While the Tax Cap law allows for an override of your calculated cap, if this proposal were successful, it would mean that if a village, town, school district or library did not stay under the cap (even if your board and voters approved a budget that overrides the cap) that tax payers would not receive the benefit of having their taxes "frozen" for two years through this proposed state subsidy. For all libraries with a public vote on their budgets, 414 libraries in particular, this would make passing your votes that much harder.

4. **Construction Needs Update Memo & Declaration of Intent to Apply for the Next Round of Construction Grants:** Expect this annual memo to arrive in your inbox in the next week. This memo is required of all libraries to state their construction needs – which are reported to the date - and to identify which libraries are planning to apply for the next round of construction grants so that I can best help you prepare for the application.

5. **Director-to-Director Mobile Device Sharing Program Launched:** An identified **barrier to staff comfort levels** with downloading media from the [MHLS Digital Download Center](#) (OverDrive) to mobile devices is the absence of **hands-on training on the variety of mobile devices patrons are walking through our doors with**. Staff that do not own their own mobile device or have experience with just a single device can benefit from exposure to and hands-on time with a variety of devices to maximize their ability to help patrons connect with services like downloadable ebooks. To that end, the Marketing Advisory Committee polled their peers at the December DA meeting and seven libraries have stepped up, **offering to lend devices they have in their libraries to libraries without these devices for the sole purpose of in-house staff training.** They'll supply the devices, you - or that one tech savvy person on your staff - organizes the training for your staff! **Information is enclosed with this month's DA packet.**

6. **What's new in LibraryAware?**
   - **Feeling boxed in by templates?** Use the **keywords** *Flexible* or *Overlay* when searching in templates and let your creativity shine through.
   - **Have more to say?** E-blasts and Newsletters now include a **Rich Text Area** option. **Think articles**. Insert the *Rich Text Area* box and add as much text as you like.
   - Create **slick e-blasts by using buttons** instead of text. From your template choose *insert image*, search **keyword button** in the gallery, insert your selected button image and link it.

   - Save time by using **promotional items as inserts.** You can now **add a previously created promotional item into a new template**. From your template choose *insert image*, select the tab *Promotional Items* and insert your selected image.

     For more information about your library's free LibraryAware account visit:
     http://midhudson.org/libraryaware.htm

7. **Non-Library-User Outreach Program**: At their next meeting the MHLS Marketing Advisory Committee will be working on the planned system-wide outreach program to **survey non-library users throughout the System service area in May-June 2014**. I've asked that libraries who are interested in participating in this program let me know. This is a great opportunity for libraries working on their next strategic plan, planning an upcoming budget vote or libraries who are interested in building their base of support in their community. Here's who I have on the list so far, if you are interested and are not on this list, please let me know:
   - Cairo
   - Cold Spring
   - Greenville
   - LaGrange
   - Hurley
   - Hyde Park
   -
   - New Lebanon
   - North Chatham
   - Pleasant Valley
   - Roeliff Jansen (Hillsdale/Copake/Ancram)
   - Staatsburg

8. **Edge Initiative:** *Edge* is a management and leadership tool that will help public libraries assess their current technology services and make improvements that will better serve their communities. As part of a national random sampling, 58 New

York State public libraries in 19 public library systems have been selected by the *Edge* Team to participate. **Seven of those libraries are in MHLS:**

- Cairo
- Cold Spring
- Greenville
- Kinderhook
- Poughkeepsie
- Rosendale
- Stone Ridge

These libraries have been invited to participate at no cost and help build a national data set for the *Edge Initiative*. The *Edge Initiative* was developed by a coalition of leading library and local government organizations with funding from the Bill and Melinda Gates Foundation and led by the Urban Libraries Council. Partners include, among others, the Public Library Association, the International City/County Managers Association, OCLC's WebJunction, ALA's Office for Information Technology Policy, the University of Maryland and the University of Washington. ***How will public libraries benefit from participating in Edge?*** There is value in using the *Edge* Benchmarks to assess and improve your library. Your *Edge* results will provide a snapshot of the library's current public technology services along with steps to make improvements. In addition, you will have the tools necessary to work more closely with your local leaders to address community issues. There are three key benefits for participating:

1. Assess the use of public access technology,
2. Identify specific ways to strengthen or enhance public access technology, and
3. Engage with key leaders about the role for the public library in improving communities.

More information about the *Edge Initiative* is available at: http://www.libraryedge.org/

9. **Upcoming Events:**

- **Legal Resources: Risk Management workshop** with Robert Schofield & Ellen Bach: Tuesday, March 18th from 6:00 – 8:00pm. This workshop is appropriate for both directors and trustees so please help spread the work to your board.

- **Advocacy Boot Camp**: Wednesday, March 26th @Patterson Library, 6:00 – 8:00pm

- **Friends Support Group:** Wednesday, April 2nd @MHLS Auditorium, 4:30-6:30pm with Guest Speaker Cassie Guthrie, Executive Director of the Pioneer Library System. **Topic: Signature Fundraising Events**

- **Vote Toolbox Workshop – "Know-how for your library's vote":** Tuesday, April 29th from 10:00am-12:00pm in the MHLS Auditorium

- **2014 LTA Trustee Institute:** May 2 & 3 at the Westchester Marriott, Tarrytown, NY http://www.librarytrustees.org/institute.php

- **New Directors Roundtable** after the May 6 DA meeting. Topic: Best Practices for Working with your Board with Patti Haar, director of the Patterson Library

Robert Drake, Information Technology Coordinator

1. **Sierra User Names:** Management of Sierra usernames is going to be transitioning to the IT department. As part of this process, we are going to be cleaning up unused logins and working with system services to develop a process around username management for the future.
    The proposed process is as follows:

    1. Each Library Director will be provided a list of usernames via action memo believed to be associated with their library. Any names indicated as no longer in use will be removed.   Names that do not have your three library code or similar identifier will be noted – if still in use you will have the opportunity to mark them for replacement.

    2. Following the receipt of these action memos, new names will be created as necessary and all names not in use will be removed.

    3. This action memo will be merged with the days closed action memo and sent annually at the end of the year to help keep our user name database current and organized.

    4. I'll be working with system services to develop a web form to best capture username information for requesting new logins throughout the year.
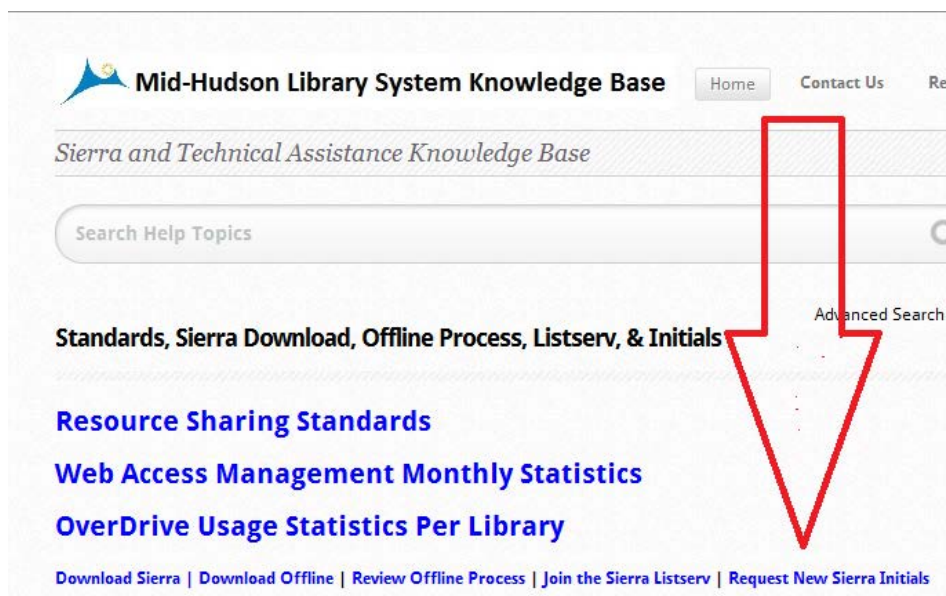
2. **E-Rate:** Deadline for Form 471 is 3/26/2014.

    Also, remember that form 471 must be filed at least 28 days after you filed Form 470. The purpose of this wait period is to give vendors time to provide quotes, which you are required save.

Prior to filling out Form 471 you should have a bidding matrix listing all of the vendors which supplied a legitimate bid on the services you listed in Form470. This matrix may use any number of criteria to come up with a final vendor, however price must be the most important criteria used. Other criteria may include previous relationship, quality of service, etc. Since these measures are subjective you have a great deal of freedom in choosing your vendor. It is important to note though that if you do not go with the highest bidder on your matrix, you will not receive funding. Further, if you are forced to go with another vendor for any reason, it will have to be the #2 company on your bid matrix if you wish to retain funding.

A sample matrix is located below:

http://www.e-ratecentral.com/applicationTips/bidAssessment/BidResponsesAssessments.pdf

Directions for Form 471: http://www.usac.org/_res/documents/sl/pdf/forms/471i.pdf

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

3. **Impact Survey:** For libraries with websites hosted with MHLS, we are happy to add the impact survey to your website. To do this, we will need the 5-7 digit FSCS code that serves as your login. If your county has not decided on a group date, we will also need to know when you want the survey to run. Info at http://midhudson.org/mhls/impactsurvey.htm

Eric McCarthy, Automation Coordinator

Cataloging

1. **Attaching an item v. creating a brief bib**: When creating brief records, first make sure you should not be attaching to an existing record. Our catalog is not "edition specific". For instance, "The Catcher in the Rye" has been published many times, with many ISBNs but we do not have bibliographic records for each ISBN change. Each library's technical services staff needs to make sure they are searching for title and author, not just the ISBN, before they are creating new bibliographic records. If your Technical Services staff would like to add an ISBN to an existing record, please feel free to contact our cataloging staff at cataloging@midhudson.org. The amount of time our catalogers spend merging records could be reduced if this extra step were taken by technical service staffs.

2. **Bucket Records**: We have many records in the catalog we refer to as bucket records. Books in the public domain might be published yearly through various imprints. These bucket records will not have an ISBN included and they always have the note: "Title may vary. Publisher may vary." A new bibliographic record may created for one of these classic titles if something significant is included in the edition: an introduction, new bibliography, etc. The decision is often made by the catalogers here on staff when a new bibliographic record is warranted. If you believe a new bibliographic record for a classic should be created, please contact the cataloging department.

3. **Linking to Wrong Record:** Cataloging staff is noticing this happening with greater frequency. Often the problem occurs when linking to A/V bib records. Be careful to note the number of disks of the item you are linking to, the narrator, the material type (DVD combo packs are often linked to non-combo pack records), and other details often found in the description field. If you see any discrepancy, please report this to the cataloging department.

4. **Brief Accuracy:** When creating a brief record, make sure to be as complete and accurate as possible. Especially when creating a record that does not include an ISBN. For instance, when creating a bibliographic record for a DVD:
    a. Include the UPC if an ISBN is not available.
    b. If splitting a combo pack, do not use the ISBN (or UPC) in the brief records being created; rather add a note to each that says something like: Disc was originally part of a combo pack ISBN 978xxxxxxxxxxx or UPC number.
    c. Use the added author to add an actor or director to further identify the record.
    d. Use the note field to add episodes of a TV series if you feel this will help identify the item in hand. Or in the case of a movie, any extra features that may help to identify this edition over another. Example: You would not need to list all the episodes of a new Breaking Bad season you are creating a record for, however, if you are creating a record for a compilation of Lone Range episodes, having the names will save time in researching that bib.
    e. Please do not include the digital copy in the number of discs description field. The digital copy should not be circulated.

    If you have any further questions, please contact the cataloging department, they will be more than happy to advise you on creating brief bibliographic records that will help minimize the wait time for full and complete bibliographic records. We are working on data entry training and will offer this soon.

    When entering a music CD, please make sure to specify if it is the explicit or edited version.

5. **Book Covers:** There have been some questions recently about book covers in the OPAC and the accuracy of the item a tech service staff member might be attaching. Book covers are based on the ISBN in the record. We contract this service with Syndetics, they also provide the enhanced content for summaries. The ISBN is most likely going to describe the hardcover version of the book but your technical services staff can attach a paperback (and should) with a different cover to this record, despite the change in appearance. As long as the item does not warrant a new bibliographic record.

Sierra

The downtime we experienced on 2/24/2014 was due to a problem Innovative was experiencing with their ISP at one of their data centers. They assured us the problem was resolved:

An outage was identified earlier today which potentially affected hosted customers but was not directly related to the Innovative Data Centers. Innovative's ISP has acknowledged that the problem was due to a nationwide problem with Cogent. This very large ISP has confirmed that they experienced a downed fiber span which caused latency for internet users. The outage was not related to Innovative's hosting equipment or software. Our ISP will continue to monitor the situation and follow up with Cogent to obtain an updated status. We have also provided a link below which can be used to monitor updates provided by Cogent.

Hudson Valley Reads Newsletters

The problems we experienced with the Hudson Valley Reads newsletters have been resolved. If patrons are reporting any issue related to newsletters, including the links contained in the newsletter not resolving, please contact me.

Mobile Device – Sharing Opportunity: Director-to-Director

The following libraries are offering to make their mobile devices available to you and your staff for the purposes of **in-house staff training**. Our hopes are that through this program, more of your staff will feel comfortable and confident using a wide variety of devices to support patron access to media available through the MHLS Digital Download (OverDrive) interface.

Please communicate directly with the library below to agree on loan times and arrange delivery.

By Device

Device	Library	Contact Person
Kindle	Julia L. Butterfield Memorial Library (Cold Spring)	Gillian Thorpe, Library Director: butterfd@gmail.com
	Highland Public Library	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
	Marlboro Free Library	Jim Cosgrove, Library Director: jcos@marlborolibrary.org
	Phoenicia Library	Liz Potter, Library Director: director@phoenicialibrary.org
	Saugerties Public Library	Frank Rees, Library Director: director@saugertiespubliclibraries.org
	Olive Free Library (West Shokan)	Katie Scott-Childress, Library Director: director@olivefreelibrary.org
Kindle Touch	Highland Public Library	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
Kindle Fire	Highland Public Library	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
Nook	Julia L. Butterfield Memorial Library (Cold Spring)	Gillian Thorpe, Library Director: butterfd@gmail.com
	Highland Public Library	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
	Marlboro Free Library	Jim Cosgrove, Library Director: jcos@marlborolibrary.org
Nook Color	Highland Public Library	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
	Pleasant Valley Free Library	Daniela Pulice, Library Director: danielapulice@gmail.com
Nook Tablet	Highland Public Library	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
Nook Simple Touch	Pleasant Valley Free Library	Daniela Pulice, Library Director: danielapulice@gmail.com
Sony Reader	Julia L. Butterfield Memorial Library (Cold Spring)	Gillian Thorpe, Library Director: butterfd@gmail.com
iPad	Julia L. Butterfield Memorial Library (Cold Spring)	Gillian Thorpe, Library Director: butterfd@gmail.com
	Highland Public Library	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
	Marlboro Free Library	Jim Cosgrove, Library Director: jcos@marlborolibrary.org
	Saugerties Public Library	Frank Rees, Library Director: director@saugertiespubliclibraries.org
Galaxy Tablet	Highland Public Library	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
Google Nexus 7	Highland Public Library	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
Asus Eee Pad Transformer Prime TF201	Marlboro Free Library	Jim Cosgrove, Library Director: jcos@marlborolibrary.org

By Library

Library	Devices	Contact Person
Julia L. Butterfield Memorial Library (Cold Spring)	Kindles, Sony Reader, Nooks, iPads	Gillian Thorpe, Library Director: butterfd@gmail.com
Highland Public Library	Kindle, Kindle Touch, Kindle Fire, iPad, Galaxy Tablet, Nook, Nook Color, Nook tablet, Google Nexus 7	Julie Dempsey, Library Director: jkelsall@highlandlibrary.org
Marlboro Free Library	Kindle, Nook, iPad, Asus Eee Pad Transformer Prime TF201 (Android tablet)	Jim Cosgrove, Library Director: jcos@marlborolibrary.org
Phoenicia Library	Kindle	Liz Potter, Library Director: director@phoenicialibrary.org
Pleasant Valley Free Library	Nook Color, Nook Simple Touch	Daniela Pulice, Library Director: danielapulice@gmail.com
Saugerties Public Library	Kindle, iPad	Frank Rees, Library Director director@saugertiespubliclibraries.org
Olive Free Library (West Shokan)	Kindle	Katie Scott-Childress, Library Director director@olivefreelibrary.org

Please communicate directly with the library below to agree on loan times and arrange delivery.

Library Trustees Association (LTA) of New York State

presents the

2014 Trustee Institute - May 2ⁿᵈ & 3ʳᵈ

Challenging the Past to Create the Future

Location: Westchester Marriott
670 White Plains Road, Tarrytown, NY 10591

Hosted by:
Mid-Hudson Library System
Ramapo-Catskill Library System
Westchester Library System

Please join fellow trustees from around the state to participate in challenging conversations that spark new questions. Share ideas and best practices as we envision the library of the future!

INSTITUTE SCHEDULE

FRIDAY, MAY 2

3:00 – 6:00 pm	GENERAL REGISTRATION
3:30 – 5:30 pm	LIBRARY TOUR OF GREENBURGH PUBLIC LIBRARY
6:00 – 7:30 pm	LIBRARY FEATURES & FUTURE FAIR *A showcase of library, library system, and vendor events, programs, activities, and products.*
7:30 – 9:30 pm	DINNER & PRESENTATION OF SERVICE & TRUSTEE AWARDS Opening remarks LTA President Bob Presutti, Host Systems and Bernard Margolis, Assistant Commissioner for Libraries and State Librarian

SATURDAY, MAY 3

8:00 – 9:00 am	BREAKFAST	
9:15 – 10:15 am	**CHALLENGING CONVERSATIONS (choice of Workshop A, B, C)**	

A. *Rethinking the Budget: Is the only choice to cut hours?*
 	
Presenter: **Gerald Nichols**
  Director, Palmer Institute for Public Library Organization and Management
	B. *Responding to Emerging Technologies: Are you prepared?*
	
	Presenter: **Norman Jacknis**
	  Senior Fellow - Intelligent Community Forum, Senior Fellow – National Association of Counties
		C. *Rediscovering Your Community: Are your only users @ the library?*
		
		Presenter: **Rebekkah Smith-Aldrich**
		  Coordinator for Library Sustainability, Mid-Hudson Library System

10:30 am – 12:00 noon	**GENERAL SESSION** *Trustee Responsibility for Intellectual Freedom: Questions you didn't know you should ask!* *Moderator:* Robert Hubsher, Executive Director RCLS Panel of Library Director, Attorney and Library Trustee will examine legal and ethical perspectives of individual privacy issues	
12:15 – 1:30 pm	LUNCHEON & PRESENTATION OF VELMA K. MOORE AWARD	
1:30 – 3:00 pm	KEYNOTE ADDRESS – *to be confirmed soon! Watch for details!*	