Merribeth Advocate, Assistant Director

1. **Upcoming workshops that will help to increase circulation:**
    a. **Web Management Reports for Circ Analysis** – Live Webinar by Thomas O'Connell
        i. Apr 7 & 10 from 10am-12pm
    b. **Enhancement of Create Lists Through Excel –** Hands-on by Bev Santero
        i. Level 1: at MHLS on May 18 from 10am-12pm & May 21 from 1pm-3pm
        ii. Level 2: at MHLS on June 10 & 11 from 10am-12pm
    c. **Throw the Bums Out – Effective Weeding for Increasing Circulation**
        i. Jun 2 at MHLS from 12:30pm-2:30pm (after the DA meeting)
        ii. Jun 3 at Saugerties from 10am-12pm.
    d. **Collection Development Through OverDrive – Best Practices for Increasing Digital Circulation**
        i. Jul 14 at MHLS from 12:30pm-2:30pm (after the DA meeting)
        ii. Jul 20 at Saugerties from 10am-12pm.
    e. **MHLS Removing Barriers Mini-Conference** – Keynote Speaker **Aaron Schmidt** (author of the 2014 book "Useful, Usable, Desirable: Applying User Experience Design to Your Library" and popular blogger at http://www.walkingpaper.org/)
        i. November 18 at MHLS (snow date if needed is 11/20)

2. **Summer Reading Mini-Grants:** Due April 9.

3. **TumbleBooks Authentication:** Many of you have received communications from TumbleBooks regarding the need for authentication of users. All access to TumbleBooks through the MHLS KidsPort at http://kidsport.midhudson.org/ and through the MHLS County eResources/HOME*ACCESS* pages at http://midhudson.org/for-the-public/databases/ does go through authentication, requiring patrons to use their library card for access. If you are one of the few libraries that has an additional link on your website that allows patrons to use this resource without a library card, note that TumbleBooks no longer permits this and the code needs to be changed. Contact techsupport@midhudson.org if you need the code that does authenticate.

4. **PlayMove&Sing Workshop with Sukey Malloy**: May 20 from 12:30pm-3:30pm in the MHLS Auditorium. An excellent professional development opportunity for staff that provide programs for young children and their caregivers.

5. **Scholastic FACE Literacy Initiative**: Research shows that children achieve superior outcomes in school and in life when they receive literacy support outside of the classroom. This support consistently results in higher graduation rates, increased future earning potential, and improved quality of life. Having books in their home is key to enhancing literacy. Enrolling in this 'take home book program' will give you 55-80% discounts and free shipping for books that will be given to children to take home and keep. More information at http://www.scholastic.com/FACE/bringliteracyhome

6. **Uncommon Approaches to Common Core 3**: in Albany August 11-12, 2015. This conference brings together public librarians, school librarians, classroom teachers, academic librarians, public historians, and representatives from museums, archives, public television, NYS historic sites, performing arts and other cultural organizations. The purpose is to develop understanding of the Common Core with the goal to create common skills, a common base of information and common language so that conference participants will be able to effectively support teachers, students (including English-language learners and children with special needs), and parents. More information at http://nysculturaled.org/uncommon-voices

7. **DA Meeting Date Changes:**
    a. May meeting has been changed to Thursday, May 7.
    b. Snow date for the November meeting has been eliminated.

8. **Completion of Fundamentals Training**: Congratulations to the following libraries who had staff complete Infopeople Online Learning Courses, approved by ALA's Library Support Staff Certification (LSSC) program, in the past 6 months for professional development in youth services:

Children's Services Fundamentals:	Teen Services Fundamentals:
Beekman Library	Brewster Public Library
Brewster Public Library	Desmond/Fish Library
Desmond/Fish Library	Kent Public Library
Kent Public Library	Kingston Library
Roeliff Janson Community Library	Pleasant Valley Library
Town of Ulster Public Library	Poughkeepsie Public Library District
	Roeliff Janson Community Library
	Starr Library

Rebekkah Smith Aldrich, Coordinator for Library Sustainability

1. **Albany Update:** An on-time budget is happening! As of the filing of this report a budget deal had been reached. The most up-to-date information will be provided at the DA meeting and through the MHLS Bulletin.

2. **Property Tax Freeze Efficiency Plan Action Memo:** On March 26th a MHLS Action Memo was sent to each director asking that you state your eligibility to trigger the Freeze rebate and share your plans for filing the required efficiency plan so that MHLS can plan on the level of support libraries will need to file. **ALL MEMBER LIBRARY DIRECTORS SHOULD FILE THIS ACTION MEMO.** Please feel free to contact me with any questions.

3. **County Funding Summary:** Representatives from each of the five counties served by MHLS came together in December to discuss county funding and advocacy for that funding. Attached to my report this month please find a summary of each county's report - how much they currently receive, how this compares to five years ago; who makes the decision; decision timeline; who is taking the lead in advocating. The group also shared best practices for advocating for county funding - this input is also included in the attachment.

a. **Please send me any corrections to the county funding information chart.**

b. **This group will meet again later this year to discuss adjustments they've made to their advocacy efforts, to fill in the blanks on the timeline and influencers list and to think about how to optimize future advocacy efforts.**

4. **Construction Needs & the State Aid For Public Library Construction Grant Program @MHLS:**

   a. Each member library director will receive a **MHLS Action Memo** that will be due on May 8th to assess

      i. **Projected construction needs – ALL MEMBER LIBRARY DIRECTORS ARE REQUIRED TO FILE THIS**. The NYS Division of Library Development relies on this information from us to justify the future of the $14 million State Aid for Library Construction Grant Program.

      ii. **Intent to apply for the upcoming round of State Aid for Public Library Construction Grants**. This section is only for those who feel they may have an eligible project for the upcoming grant cycle. The memo contains a checklist for you to help determine the eligibility and feasibility of your planned project.

   b. I am offering a **webinar on Friday, April 24th from 2:30 – 3:30pm** to help orient libraries to the grant program and help them fill out the action memo. Please register online at http://calendar.midhudson.org for this event.

   c. On average there is 2.5 times the amount of funds available requested through the grant program in MHLS. This means it is a COMPETITIVE GRANT PROGRAM. **Not only does your project need to meet the eligibility requirements for the grant program** *(found here: http://www.nysl.nysed.gov/libdev/construc/14m/faq.htm#b4*) **it also needs to address the priorities for funding set by the MHLS Board of Trustees.** These priorities were set at the March 2015 MHLS Board of Trustees meeting:

      i. Project must be **part of a long-range plan or a prioritized facility plan** which is reported to MHLS through the Construction Needs Action Memo issued annually (see above) and

      ii. **Provide for at least one of the following (the more the better!):**
         1. **An increase in services**, through an increase in usable public space or increased staff efficiencies (e.g., new buildings, additions to current buildings, renovation of existing areas for new uses); and/or
         2. **An increase in access** (e.g., handicapped accessibility; to optimize a space to bring in a new or underserved population); and/or
         3. **Energy conservation in the context of a professional's recommendations or with an historic preservation element.** For the purposes of the board's ranking a "professional's recommendation" will, at least, include the results of an Energy Audit by the NYS Energy Research & Development Authority (NYSERDA).

d. The MHLS Board also confirmed that they will retain their **definition of an "economically disadvantaged community"** for the coming grant cycle. Therefore it remains unchanged:

Definition:
(1) a political subdivision within which **15 percent** or more of the population is living in poverty as shown on the latest federal census.

(2) a public school district within which the percentage of student enrollment that is eligible for free and reduced lunch under the national school lunch program is **40 percent** or more for at least one month during the twelve months prior to the date of filing of the grant application.

(3) a political subdivision as described in #1 within which **10 percent** or more of the population is living in poverty **and** a public school district as described in #2 within which the percentage of student enrollment that is eligible for free and reduced lunch under the national school lunch program is **30 percent** or more.

5. **EveryLibrary Workshop Confirmed**: Thank you for your flexibility on your meeting date in May. As a result we are pleased to confirm that on **Thursday, May 7th from 12:30 – 2:30pm (after the DA meeting)** we will host a workshop at MHLS presented by John Chrastska, Executive Director of EveryLibrary, the first national political action committee for libraries. We invite member library **directors, trustees, staff and Friends Groups** to join us for a deep dive into library funding and building referendum campaigns from around the country. Since it started in 2013, EveryLibrary has provided pro-bono consulting and coaching to 25 library communities at the ballot box, winning 19 and assisting to secure over $46 million in stable tax revenue for those libraries. John will share real-world insights and actionable ideas for rural, suburban, and urban library campaigns, particularly for low-resourced communities. Whether you are on the ballot in 2015 or sometime in the next 3 years, come to learn about what drives voter behavior, how to engage - and overcome - the 5 main sources of opposition to library campaigns, how to use social media effectively in advance of a campaign, and how to leverage the entire advocacy community for success. You'll hopefully come away with a new framework for Information Only and YES campaigns. Please register online for this event at http://calendar.midhudson.org

6. **Policy Clinic: Internal Financial Controls** – In response to requests to help member library directors optimize their policies we will be piloting "policy clinic" events in late May. Our first focus will be on libraries' internal financial controls. The event will have two parts: 1) an overview of the policy area of focus and 2) hands-on time to work on your policies. Our first clinic will be held in two locations, both events will be from 10:00am-12:00pm:
   a. Thursday, May 28th @MHLS
   b. Friday, May 29th @Phoenicia Library

7. THANK YOU to all directors who responded to our **Member Library Contact Information Update request**. We heard from 65 of 66 libraries this year, a new record!

Robert Drake, Technology Operations Manager

Technology Operations Overview

1. **Ticket System for All Requests:** Hello everyone, just a reminder that all Sierra, website, tech everything queries should go to techsupport@midhudson.org. This goes into our ticket system which is directly accessed by five different staff people including myself, Gerry Formby, and Thomas O'Connell. Unlike our individual emails, multiple people are tracking whether or not tickets are resolved in timely fashion.

   To this end, please remind your staff to use this as well. While we endeavor to get through every email they send, tickets receive a much faster resolution due to the number of people simultaneously working to solve them.

IT/Technology

1. **E-Rate:** The deadline for Form 471 has been extended to 4/16/2015. If you have any last minute questions, feel free to contact techsupport@midhudson.org

Sierra/ILS

1. **Sierra Q&A Webinar:** Automation Coordinator Thomas O'Connell will offer his third lunchtime webinar of training and Q&A on Monday April 20th at noon. April's discussion will be an extension of March's session on reaching out to patrons via Sierra. The session will take place via a Goto Meeting session and last about 45 minutes. There is a 15 person attendance limit, so register on our calendar if you'd like to attend.

   If you have ideas about topics you would like to see covered in potential future sessions, please contact Thomas at toconnell@midhudson.org or call him at (845) 471-6060, ext. 221.

2. **Expiring Patrons:** To help facilitate libraries that wish to contact expiring patrons, we will be posting the 1st week of each month, a list of those patrons expiring in the next subsequent month (ex. On April 1, we will post those patrons expiring within May.
   a. http://kb.midhudson.org/patrons-expiring-next-month/ This link can also be found on the home page of the knowledgebase kb.midhudson.org .

Cataloguing

1. **Holdings Statement Action Memo:** There are a high number of inaccuracies in our holdings statements throughout the catalog. In order for our shared catalog to function properly, and adequately serve our patrons, each library needs to maintain an accurate holdings statement and item record for each magazine title owned.

   Nina Acosta sent out a to-be yearly reminder to update these holdings statements along with a list of titles and record numbers for magazines that are missing either item records or holdings statements. If you have any questions on updating these records please contact nacosta@midhudson.org.

2. **Database Statistics:** To be provided at DA meeting.

County Funding Summary

County	2014 Amount Received	How this compares:	What fund are used for	Timing/Key Players
Columbia County (11 libraries)	$57,000	2009: $65,000; 5% down over each of the past two years	Divided evenly amongst libraries; to be used at their discretion	**Decision Makers:** Board of Supervisors **Influencers:** Governance Committee oversees library aid from the county **Timing:** Decision made in the last quarter of the year **Conduit:** Columbia County Library Association (inactive); Columbia County Directors meetings (ad hoc)
Dutchess County (22 libraries)	$30,000	2009: $249,893 Now comes in the form of a competitive grant with double the number of agencies competing for less funds	Specific grant project: Teen Geeks. Majority of libraries participate but not all.	**Decision Makers:** County Executive (elected) & County Legislature **Timing:** Grant application released in November; Grant application due in January Sept-Oct Advocacy for line-item for grant program? (Should be on-going?) Grant funds awarded end of March/May; grant period covers April 1 – March 30; December – budget hearing @Bardavon **Influencers:** Currently unclear about which department/committee oversees grant program. County Survey to taxpayers about what they would pay extra for, used to include libraries, taxpayers clearly said libraries were something they would invest in; currently libraries are not an option on this survey **Conduit:** Dutchess County Directors meetings (ad hoc with bylaws); PPLD serves as pass through
Greene County (8 libraries)	$32,700	2009: $39,000; past four years @$32,700; anticipating level funding for 2015	-Pays Greene County share of MHLS database and ebook charges -$2,000 per library for discretionary spending -Pays tech support for libraries. Reimbursed upon request	**Decision Makers:** County Administrator (hired by the legislator) & County Legislature **Influencers:** Education Committee oversees funding **Timing:** Budget request due in the fall; used to accompany this with a presentation; Supply an annual report to the legislature in February **Conduit:** Greene County Library Association (they think they are a 501c3, not sure)

Putnam County (8 libraries)	$400,000	2009: $368,116; Have seen this amount increase each year. 5% increase projected for 2015	$350,000 divided proportionally based on population among libraries to be spent at their discretion. $50,000 is spent "programmatically" on the database and ebook charges through MHLS; to the county central library (Mahopac) and on homework help resources	**Decision Makers:** County Executive (elected) & County Legislature (9 members) **Timing:** Budget voted on before Election Day; end June/beginning July, departments heads solicited for input to the budget; *Public hearings in October; Spring: Proclamation by the county legislature using ALA template for National Library Week (start advocating for this in March so that it is done by April, good photo opp/press release for National Library Week); ongoing: *visible presence at the legislature meeting routinely – sit together, wear identifying buttons/stickers **Influencers:** Budget drafted by the Commissioner of Finance → County Executive presents budget to the legislature; *Rules Committee oversees library budget line (3 members of the committee) **Conduit:** Putnam County Library Association (501c3)
Ulster County (17 MHLS libraries/ 21 total)	$74,250	2009: $90,000 This is a line item in the county budget rather than considered one of the "outside contract agencies"	Supports the county InfoPortal [http://uclib.org/infoportal/] Pays for Ulster County share of MHLS database and ebook charges; $1,000 towards publicity	**Decision Makers:** County Executive (elected) & County Legislature **Timing:** Budget prep over the summer 3 public hearings held in various locations throughout the county November budget gets approved Formerly did a presentation to the legislature (outside of the budget timeline) **Influencers:** *Programs Committee meetings; get on their agenda to update them, build case for ask **Conduit:** Ulster County Library Association (501c3)

County Advocacy Techniques: What Works?

Notes from the December 2014 County Funding Advocacy Meeting @MHLS

- Show up. Be visible. Make sure they know your name.
- Keep things basic; do not assume they know anything about libraries
- Get legislators into libraries within their district: to read to children, for photo opportunities, for a VIP/behind the scenes tour
- At public hearings:
  - Use data
  - Be organized – line up speakers, dole out talking points – don't have each person say the same thing
  - Have patrons speak, particularly kids
  - Know what you are asking for
  - Numbers matter in the audience, even if not speaking, library supporters should be visible (buttons, signs, all sit together…)
  - Speak to the value of libraries in context of pressing issues (Putnam County: "after the storm"; Healthy Ulster County; Veterans Home project of the Ulster County Executive)
- Track WHEN action is needed
- All libraries in the county need to be on the same page; know what each other is doing; county funds should be an agenda item on each county director's meeting agenda
- Present budget in a professional manner
- Work on county advocacy year round, not just at decision time
  - Start early
  - Putnam County asks the legislature to do a Proclamation for National Library Week. They use the ALA template for the proclamation and begin working on this early in the year so it is ready to go in April for NLW.
  - Four times a year, attend county legislature meeting, get on agenda, report on good things going on at libraries around the county
- Someone has to "take point" – at least one director need to keep track of the timeline, help everyone get organized, keep people informed, delegate work/speaking engagements/etc.
- Cultivate comfort/trust/understanding with legislators
- Make patrons, trustees and Friends visible as speakers/writers/attendees
- Prepare for the next election and for turnover of legislators
- Find ways to convey you are working together with the legislature and county executive towards common goals

- Use "return on investment" message
- Understand who knows who and who is best to speak with/influence a particular stakeholder
- Invite legislators to your county-based events
- Recognize the need to utilize different communication styles and methods (data, anecdotes, graphics and photos – mix them up); use humor
- Frame your ask – tie to trending topics; understand the political agendas at play
- Seek informal opportunities to speak with executive and legislators. Be in the right place at the right time.
- If you need more funds, ask for more funds. If you don't ask, you won't get. When you don't get what you ask for, don't sulk, say thank you for what they were able to give you
- Build strong community partnerships – if other organizations view you as a partner they will help advocate for you
- Be good at talking about how libraries help with community-wide issues, not just "library issues"
- Have clear answers to the question of whether or not county funds = double taxation.
    - Equal access for all county residents, including those in unserved areas
    - Savings by working together; collective purchasing
    - Diversified funding sources for essential services
    - Fee for specific service