

Consultant Reports
MHLS Director's Association
Meeting of Wednesday, September 2, 2015

Merribeth Advocate, Assistant Director

1. Summer Reading Program Final Reports due from all MHLS libraries on September 9:

- a. **All libraries** are required by NYS to provide a Summer Reading Program Final Report. Access the report form at https://www.surveymonkey.com/r/SRP_2015 . Once received, a copy of your completed report will be emailed to your library. Please allow 1 to 2 business days to process.
- b. This report will help your library collect information needed for member library Annual Reports as well as provide NYS with important feedback about public library Summer Reading programs. Reminder: NYS considers any program that takes place during the summer months to be a "Summer Reading Program".

3. Choosing Community Partners and Building Rapport:

- a. In summer 2015, 19 MHLS member libraries received mini-grants from MHLS through the NYS Family Literacy Library Service Grant Program. The libraries were required to collaboratively plan (with agencies that affect their communities) interactive inquiry-based programs for families, before submitting the project to MHLS, resulting in 19 new community partnerships being developed and expanded. 100% of the libraries reported that their collaborations were successful, that they benefitted from the collaboration, that families in their community benefitted from the collaboration, and that their community partner agency benefitted from the collaboration. Thank you to the libraries involved for sharing their proven ideas for choosing a community partner and building rapport, available through the Tip Sheet at <http://tinyurl.com/oqdl9kx> .

4. Public Librarian Certificate - check your own certificate to make sure it is ACTIVE: several MHLS librarians have reported that their certificate is listed as INACTIVE.

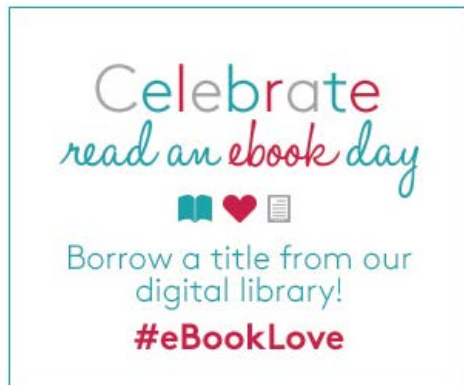
- a. Any person appointed to or employed in a permanent (part-time or full-time) professional librarian position in a public, free association or Indian library in New York State must hold an **ACTIVE public librarian certificate** issued by the New York State Education Department. Certificates must be renewed prior to their five year expiration date in order to remain ACTIVE. The status and expiration dates of Public Librarian Certificates may be verified by using the "Search for Certified Public Librarians in New York State since 1970" link on the Public Librarian Certification webpage at <http://www.nysl.nysed.gov/libdev/cert/search.htm>
- b. It is critically important that all certificate holders issued a Public Librarian Certificate as of January 1, 2010 and thereafter update their personal contact information using the new NYS Public Librarian Certification Portal <http://www.nysl.nysed.gov/libdev/cert/index.html> as soon as possible. This contact information will be used to send email reminders to certificate holders about upcoming expiration and renewal dates.
- c. Public Librarian Certificate holders issued a certificate as of January 1, 2010 and thereafter, will use the new online portal to renew their certificate. Any certificate holder may use the online portal to update contact information, request a name change, or print a certificate.
- d. Questions about the new online portal or about New York State public librarian certification requirements may be sent to NYSLPUBLIB@nysed.gov.

5. Marketing OverDrive:

- a. **7 Tips to Engage Digital Readers in your Community Who Are Not Currently Using the Library's Digital Collection** and tips to spread the word to library users too! Attached, and available at <http://tinyurl.com/q5dqgk7>.

- b. **Read an eBook Day – September 18:**

- i. The purpose of 'Read an eBook Day' is to celebrate digital reading as a great way to connect readers with their libraries and authors they love. Given that September is Library Card Sign-up Month, Read an eBook Day is the perfect time to introduce all your new users to your digital collection! Libraries and users alike are encouraged to share what they're reading, how they are celebrating on social media and join the #eBookLove conversation. You can also send users to <http://readanebookday.com> for reading recommendations based on their favorite genres.
- ii. To help spread the word and get your community excited about the MHLS Digital Download collection at <http://mhls.lib.overdrive.com> here are some quick promotional ideas from OverDrive:
 1. Issue a press release to your local news outlets. There is a template you can download at <http://tinyurl.com/o59pav9>
 2. Put a 'Read an eBook Day' graphic on your library website and link it to the MHLS Digital Download collection at <http://mhls.lib.overdrive.com/>. 3 graphics available:
 - a. <http://tinyurl.com/owbbnxc>
 - b. <http://tinyurl.com/qdz2bbx>
 - c. <http://tinyurl.com/nod353a>.
 3. Use these marketing materials to promote both inside and outside your community
 - a. Flyer: <http://tinyurl.com/npe4gvw>
 - b. ¼ sheet "I'm reading an eBook on Read an eBook Day" pledges: <http://tinyurl.com/nwc4lqr>
 - c. "I Love eBooks from my Library!" Stickers: <http://tinyurl.com/nlmmgtc>



Rebekkah Smith Aldrich, Coordinator for Library Sustainability

1. **Special District Legislation Vetoed by the Governor:** The Governor once again used his veto power to stop the potential creation of special district public libraries.
 - a. His veto message: *"...While I appreciate the Legislature's desire to assist in the maintenance and growth of public libraries, I remain concerned that these bills would establish yet another level of local government. At a time when taxpayers continue to be overwhelmed with property taxes, these bills have the potential to add to this onerous burden and add further to the plethora of levels of local government. For these reasons, I disapprove these bills."*
 - b. **Thank you** to everyone who quickly responded to the call to action to attempt to stave off this veto. The New York library community rallied and sent close to 1,000 letters to the Governor in less than a week.
 - c. **Next Steps:** This is a matter of statewide concern.

- i. The Public Library System Directors of NYS (PULISDO) have issued an official letter to State Librarian Bernie Margolis requesting his “leadership, guidance and support in addressing this issue.”
 - ii. The New York Library Association is seeking a meeting with the Governor’s staff to continue education on the issue and attempt to discover new paths forward. This is also a topic of discussion on the NYLA Legislative Committee’s agenda.
 - iii. The Regents Advisory Council will discuss this at their next meeting.
 - d. The Starr Library will pursue a 414 vote this November, a path they have used before to stabilize their funding. **We thank Steve Cook and the Starr Library board** for trying a second time. It was not an easy thing to do and as much as they did it for themselves, they “took one for the team” as well.
- 2. Tax Cap:** The 2016 inflation factor for those with a January 1 – December 31 fiscal year has been announced by the Office of the State Comptroller. It is **0.73%**.
- a. If needed, the language for an override resolution can be found here:
http://www.nyla.org/images/nyla/files/Sample_Tax_Cap_Override_Resolution.pdf
 - b. A reminder that the tax cap form must be filed
 - i. between when the form becomes available and prior to adoption of your budget for libraries with a calendar fiscal year (Jan-Dec)
 - ii. by March 1 for libraries with a school fiscal year (June-July)
- 3. The “Public Library Policies – Development Tips & Samples”** page [<http://midhudson.org/topics/director-resources/policies/>]
- a. Updated to bring everything into alignment with internal financial control best practices cited by the Office of the State Comptroller. Now includes a link to the **MHLS Internal Financial Controls Inventory Audit worksheet** used in the MHLS Policy Clinics earlier this year. You will need to use the OSC publication “The Practice of Internal Controls” (<http://www.osc.state.ny.us/localgov/pubs/lmg/practiceinternalcontrols.pdf>) as a reference with the worksheet.
 - i. Direct link to the worksheet: <http://midhudson.org/wp-content/uploads/2012/11/Internal-Financial-Controls-Inventory-Audit-Worksheet.doc>
 - b. **Updated MHLS Essential Documents Inventory Workbook (MS Excel).** For those of you already using the spreadsheet, no need to start over, here are the updates you can note in your existing copy:
 - i. External worksheet: no changes
 - ii. Internal worksheet:
 - 1. Essential Documents
 - a. ADD – Bill of Rights (ALA)
 - 2. Administrative
 - a. ADD – Records Management
 - 3. Financial Controls
 - a. ADD – Fund Balance / Reserve Funds
 - b. ADD – Wire Transfer / Online Banking
 - c. ADD – Travel and Conference
 - iii. Personnel worksheet:
 - 1. ADD – Whistleblower

2. REMOVE – Grievance (This has been removed, as a separate policy, as it has been determined to be a procedure embedded within your Harassment and Whistleblower policies.)

4. **Project Outcome** [<http://www.projectoutcome.org/>]: Project Outcome is now open for enrollment by all interested libraries.
 - a. “Project Outcome is dedicated to helping public libraries understand and share the true impact of essential library services and programs with simple-survey instruments and an easy-to-use process for measuring and analyzing outcomes. Project Outcome also provides public libraries with the resources, training and supportive online community needed to apply their results and confidently advocate for their library’s future.”
 - b. This program is free of charge.
 - c. On July 23, PLA hosted a webinar “How to Enroll in Project Outcome,” where participants learned how to use the website, survey portal, data dashboards, and other resources available through Project Outcome. If you were unable to attend the webinar or want to revisit what you learned, you can find an archived recording on the Project Outcome website (<http://www.projectoutcome.org/surveys-resources/how-to-enroll-in-project-outcome>). PLA will continue to host a variety of webinars in the upcoming months to keep participants informed and engaged. The upcoming webinars will help participants learn how to use and apply survey results, hear from peers about their own outcomes measurement techniques and experiences, and learn how to meet strategic goals through outcomes measurement.

5. **USA FREEDOM Act:** The USA FREEDOM Act is a federal statute passed in May of this year that “replaces and rectifies” Section 215 of the USA PATRIOT Act, the infamous “library records” provision of the PATRIOT Act, that allowed law enforcement officials to request patron reading and computer records from libraries – and then issue a gag order to prevent librarians from talking about these investigations.
 - a. The NSA will no longer collect library records in bulk
 - b. Any request for records must relate to a specific investigation
 - c. If a library does receive a gag order via a National Security letter there is now a stronger judicial review process

This is a good time to remind you to **review your library’s data collection procedures; brush up on patron confidentiality rights in New York State; and to review your law enforcement inquiry policy.** Check out the MHLS policy sample and development tips page (mentioned in #3 of my report) for more information on this topic.

6. **Friends of Libraries Week is October 19-24, 2015** – “The celebration offers a two-fold opportunity to celebrate Friends. Use the time to creatively promote your group in the community, to raise awareness, and to promote membership. This is also an excellent opportunity for your library and Board of Trustees to recognize the Friends for their help and support of the library.” For ideas, press releases and more please visit http://www.ala.org/united/events_conferences/folweek
7. **Leadership Circle:** Our next meeting will be Tuesday, October 6th after the DA meeting (12:30-2:30pm) Our topic will be “Diagnosing Your Library’s Organizational Culture” with guest presenter Jim Cosgrove. “Organizational Culture has been defined as “the way we do things around here.” At this event, the third meeting of this group, we will

- a. Learn about the Marlboro Library's experience using the Competing Values Framework to diagnose organizational culture
- b. Review practical ways you too can diagnose your library's culture to improve library service
- c. "Stories from the Frontlines" related to developing a higher understanding of how organizational culture impacts the director's leadership

Special note: We will be covering content from the book "*Diagnosing and Changing Organizational Culture*," by Kim S. Cameron & Robert E. Quinn. We thought you might like to obtain a copy to review before or after the event. This is not mandatory reading, just a suggestion!

8. **County Funding Advocacy Group** will meet on Tuesday, December 15th from 1:00 – 3:00pm in the MHLS Auditorium. We would very much like representation from each county there to receive updates on county funding advocacy, share effective strategies to position libraries to receive county funding and discuss grassroots advocacy efforts that are working.

Robert Drake, Technology Operations Manager

Technology Operations Overview

1. Ticket System for All Requests

- a. 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.
- b. 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 Research, Programming, News

2. E-Rate Bear Form

- a. If you have not already, for E-Rate funding year, 2014-2015, don't forget to file Form 472 (BEAR), which requests reimbursement. This form can be found here: <http://www.usac.org/sl/applicants/step07/form-472-filing.aspx>
- b. The deadline for this is based on when your services are completed (for voice services, usually the last day of the funding year) and can be calculated using this tool: http://www.usac.org/sl/tools/deadlines/form_472.aspx

3. E-Rate Changes & Opportunities: October 8th, 2015, from 10:00AM to 12:00 Noon

- a. As reimbursement for voice services is deprecated, libraries face new choices as to how and if they apply for E-rate Reimbursement. To help explain these changes and strategies libraries might use going forward, John Rossi, of TeleTech Associates, Inc has agreed to speak in the MHLS Auditorium on October 8th, 2015, from 10:00AM to 12:00 Noon. For more details on this presentation please view the flyer being distributed at the DA meeting, or contact rdrake@midhudson.org .

4. Windows 10 & Sierra

- a. Windows 10 is released! Based on our testing, both Sierra and SAM appear to work no differently than they do with Windows 7 (Yes 7!) however neither product is officially supporting it just yet. If choosing to move forward, we recommend doing so only with secondary staff computers at this time.

5. Sierra Q&A Webinar

- a. Automation Coordinator Thomas O'Connell will offer his usual lunchtime webinar of training and Q&A on Wednesday September 23rd at noon. The session will take place via a GotoMeeting session and last about 45 minutes. There is a 15 person attendance limit, so register on our calendar if you'd like to attend.
- b. 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.

Cataloguing

6. Expiring Patrons & "High Cost" Items

- a. Just a reminder, a list of the subsequent months expiring patrons is exported to the home page of the knowledgebase.
- b. We are now posting quarterly those items in the system over \$2500, which usually means they have been mis-entered.

7. Cataloging Schedule of Work: Aside from cataloging over 700 records a week and answering questions ranging from title/sub title changes, to changing number of disks, MHLS staff also perform a variety of clean-up and maintenance work on the catalog. An abstract of these tasks and the schedule they are performed is provided below. As staff find errors in records, please feel free to send recommended procedures that can make the catalog best for your patrons to toconnell@midhudson.org

Weekly:

- Use high demand holds list to prioritize cataloging of prepublication titles .
- Add subject headings to local history records
- Check our catalog for instances of common typographical errors such as those found at <http://librarytypos.blogspot.com/>.
- Delete records with no items or orders attached.

Monthly:

- Delete or suppress records with all orders received and no items attached.
- Check for mismatches on Material Type vs. General Material Designations
- Delete canceled orders.

Bi-Yearly:

- Run searches for incorrect skip digits in cataloged records.
- Check for invalid subfields or indicators, and correct them.

7 Tips to Engage Digital Readers in your Community Who Are Not Currently Using the Library's Digital Collection

Keep spreading the word about your digital collection!



- 1. WORD OF MOUTH:** The very best way to get the word out is to tell people. Really. If every staff member, trustee and Friend of the library told 10 people about this incredible resource, and those 10 people told 10 more people, and those 10 people told...The word would be out in no time! Tips for making this happen at <http://midhudson.org/topics/sustainable-libraries/marketing-pr/> under Word-of-Mouth Marketing (WOMM).
- 2. SIGNS:** Signs by the side of the road are the 2nd most popular way for people to find out about something. Promote on the existing library sign or create something custom.
 - Banners and Lawn Signs: Create a custom vinyl banner for as low as \$40. Other promotional signs are available to customize including yard signs and A-frame signs at <http://midhudson.org/topics/sustainable-libraries/marketing-pr/> under Do It Yourself (DIY).
- 3. BOOKMARKS, POSTERS, FLYERS:** Distribute in places that offer free Wi-Fi, along with coffee shops and bars. OverDrive Seasonal Promotional Materials at <http://midhudson.org/topics/sustainable-libraries/marketing-pr/pr-materials-gallery/> under Vendor Promotional Materials - OverDrive .



4. SOCIAL MEDIA:

- **FACEBOOK ADVERTISEMENTS: An economical way to provide greater exposure to your digital collection.** There are a variety of different types of FaceBook dvertisements, but potentially the most effective for libraries is 'boosting a post'.
 - *"I like boosting the FB posts a lot. A normal post's reach for us, without a boost, might top out at 300 if it got picked up by the little local news FB page. I don't know what the other legitimate avenues for advertising / getting the word out are. FB seems like the most robust thing after a local newspaper, which we don't have any more, and it's not that expensive."*
 - More about Boosting a Post at <https://www.facebook.com/help/347839548598012>
 - More about Facebook Advertisements at <https://www.facebook.com/ads/manager/creation/creation/>
 - **REDDIT: This news aggregate site is where the local conversations are happening.** Sub-reddits are topic or regionally based. Join an existing sub-reddit (a sampling listed below) or create one.
 - <http://www.reddit.com/r/beacon>
 - <http://www.reddit.com/r/brewsterNY>
 - <http://www.reddit.com/r/catskills>
 - <http://www.reddit.com/r/PhilmontNY>
 - <http://www.reddit.com/r/poughkeepsie>
 - <http://www.reddit.com/r/mahopac>
 - <http://www.reddit.com/r/NewPaltz>
 - <http://www.reddit.com/r/TivoliNY>
 - <http://www.reddit.com/r/hudsonvalley>-> by far the largest of the MHLS regional subreddits
5. **ONLINE LIBRARY CARD REGISTRATION: Attracting new users to start using the library digital collection really works when they can get their new library card now.** Online library card registration is available to all MHLS libraries for free. Contact techsupport@midhudson.org for the details.
6. **COMMUNITY EMAIL LISTS: Check what email addresses are available to you of people who might not yet be library users.** *"We reached into the community, sending a direct email to every city employee, advertising our eBook collection."* – Heather G, Watsonville Public Library
7. **LIBRARY EVENTS: You got them in the door, give them something more.** Library programming that is based on community interests brings in people who might not be library users. Seize the opportunity to surprise and delight this group by providing information at your library events about your digital collection.

Keep spreading the word about your digital collection to library users also!

'ALSO AVAILABLE AS AN E-BOOK' STICKERS AND SHELF TALKERS: Use with library books. Available at <http://midhudson.org/topics/sustainable-libraries/marketing-pr/pr-materials-gallery/> under Vendor Promotional Materials - OverDrive



DISPLAY IN THE LIBRARY: *"We created an in-library display of book covers that correlated with popular eBook titles and had a computer display at our checkout desks with information about OverDrive."*— Heather G, Watsonville Public Library

E-NEWSLETTERS: Spotlight some of the Featured Collections in the MHLS Digital Download Collection. Email Merribeth at madvocate@midhudson.org to get the most current link for the Featured Collection you want to promote:

- Summer Reads: <http://mhls.lib.overdrive.com/10/SKINID/en/CuratedCollection2.htm>
- Hudson Valley
- Books Becoming Movies
- Libros en Español
- Book Club Picks
- All the Light We Cannot See Read-Alikes
- Gone Girl Read-Alikes
- Shakespeare Saved My Life Read-Alikes
- Go Set a Watchman: To Kill a Mockingbird Series, Book 2 Read-Alikes

E-BLASTS: Make your Sierra patron e-mail list work for you. Use Library Aware to design professional e-blasts to patrons. Every MHLS member library has access to this free marketing program at <http://midhudson.org/topics/sustainable-libraries/marketing-pr/> under Do It Yourself (DIY)