

Consultant Reports
MHLS Directors Association
Meeting of Friday, February 5, 2016

Merribeth Advocate, Assistant Director

1. 2015 Annual Reports

- a. Each library is required to do an annual report online. All 2015 reports should be fully submitted by the end of day on February 19.
- b. At <http://midhudson.org/mhls-tips-for-completing-the-2015-annual-report/> you will find tips and information to help making the process of completing your 2015 annual report easier. New tips are being added to this list as they are uncovered.
- c. A reminder to add to your February or March Board meeting agenda the review and acceptance of the library annual report.

2. Zinio for Libraries eMagazines:

- a. This new product was successfully launched on January 1.
- b. In early February, MHLS will start monthly postings of the Zinio for Library statistics at <http://midhudson.org/topics/statistics-research/zino-usage-statistics-by-library>. The statistics are collected by library patron barcode range. We will provide by library, the patron registration numbers and the number of magazines checked out, during the month.

- 3. Vendor Contacts for Potential Databases:** A reminder that in September 2014 it was decided that MHLS and the Central Library/Collection Development Advisory Committee will only review databases that have been brought to the CL/CD committee by a county group for potential group purchase. Please do not refer vendors directly to MHLS.

- 4. Security Cases:** If your library uses security cases for AV materials, please let me know.

Rebekkah Smith Aldrich, Coordinator for Library Sustainability

1. **Governor proposes flat funding for library aid and construction aid.** While the good news is that the Governor retained the legislative add we achieved last year to match an increase to Library Aid with his proposed increase to Education Aid the bad news is that he held us flat to that number rather than making the connection that Libraries ARE Education and should be increased at the same rate as schools. The Governor also kept construction aid for public libraries flat for the 10th consecutive year.

There is work to be done this budget season to be sure. In the balance is tens of thousands of dollars for MHLS services to your library and your Local Library Services aid and hundreds of thousands of dollars for public library construction in our region.

- a. We need ***your*** help to push more library advocates to the NYLA Online Advocacy Center:
<http://bit.ly/1aPLSQb>



Will ***you*** commit to finding ***21 people or more*** over the next month to speak up for 21st Century library aid levels and send a message through this interface?

If so, MHLS will be in the lead in what is shaping up to be another year of competition with the other 22 library systems throughout the state! Let's make this happen!!!

- b. **Help us create a visual message with impact!** We're calling on **at least two libraries per legislative district** (more would be awesome!) to help us tell the story of what a good investment libraries are. Thanks to the investment of State dollars in the System your library is able to amplify your impact in your community to a ratio as high as 1:7, that's right, for every \$1 in State Aid the NYS Division of Library Development calculates this to result in \$7 worth of service to the public – that's impressive and a talking point we need to drive home.

To help us do this we're rolling out a request:

- ① Work with an avid library user or family of avid library users to calculate how much they save in a year using the ALA Library Use Value Calculator:
http://www.ala.org/advocacy/advleg/advocacyuniversity/toolkit/makingthecase/library_calculator
- ② Once the annual figure is calculated:
 - a) take a screen shot of the calculation to have on hand and
 - b) have the library user(s) write that number on a piece of paper (fairly large so it stands out) and snap a photo of the person or family holding up this sign:

\$495

[Don't forget: Use your **Photo Release Form** to document your patron's agreement to use their photo.]

③ Post this to your Facebook page (and Twitter and Instagram...) with a message telling the story of the picture and pushing your followers to use the Online Advocacy Center [<http://bit.ly/1aPLSQb>] to reach out to their legislators. Feel free to tag your legislators! Hashtags: #LibrariesTransform #nylalad16 #BuilttoLead

For example:

This is Alena, age 7. Alena loves to read. A LOT. Last year, her family saved \$9,234 because Alena came to Phoenicia Library for all her books, movies and for tons of free, cool programs. Won't you take TWO minutes to tell your NYS legislators how much your library means to YOU? The Governor has flatlined our library funding in his budget proposal and our communities need our legislators to stand up for libraries. We need your help. Make your voice heard!
<http://bit.ly/1aPLSQb> **Please share**. #NYLALAD16 #BuilttoLead #LibrariesTransform

#NYLALAD16 = hashtag for NYLA Library Advocacy Day

#BuilttoLead = Governor Cuomo's State of the State theme

#LibrariesTransform = American Library Association's marketing campaign

④ Send me this photo to be used on promotional pieces that will be used on Advocacy Day by February 24th.

- c. **Registration for Library Advocacy Day is now open!** With 15 legislators to make an impression on we need strong representation from each Senate and Assembly District in Albany on March 2. Please spread the word that library advocates can make a difference in Albany on this day and that libraries are counting on us to have a strong showing in Albany. To make this day as easy as possible we've been working hard to organize support for the day with our partners:
- i. Online Advocacy Day Briefing: February 19th @10:00am presented by myself in partnership with NYLA Executive Director Jeremy Johannesen.

- ii. Coordinated bus transportation along the NYS Thruway. THANKS TO THE GENEROSITY OF MHLS AREA FRIENDS GROUPS who donated to support the buses to Albany last year **the ticket price this year is 25% lower!** (Bus registration info is online and on the Advocacy Day flyer sent to your library and available at the DA meeting.)

2. Tax Cap:

- a. The State Comptroller has announced that the property tax levy growth for school districts will be capped at 0.12 percent above current levels for the 2016-2017. This number is a good predictor of where local governments (and therefore libraries) will land as well. Plan accordingly and urge your board to pass a preemptive override resolution if you pursue anything other than flat funding. You can always rescind the resolution later on if you stay below the cap.
 - b. I apologize for the late notice of the need for libraries with a calendar fiscal year to report file the Property Tax Freeze form with the Office of the State Comptroller. Libraries with a school calendar fiscal year will need to file this form in July.
 - c. The recent Freeze Form deadline announcement resulted in a veritable avalanche of questions to me about the Tax Cap in general including the revelation that a number of libraries have not been filing the annual Tax Cap form with OSC. ***I cannot stress enough that non-compliance with the Tax Cap procedures has the potential for a devastating financial impact on your library as you would need to “pay back” the community for any increase not properly requested (meaning a resolution was not passed appropriately if you overrode the cap and your reporting to NYS reflects this.)***
 - d. If you are feeling uncertain about the Property Tax Cap and the filing requirements please view the webinar we recorded on the subject: <https://www.youtube.com/watch?v=-hJ2GjiZ2hA&feature=youtu.be>
3. **Open Meetings Law (OML) Workshop Scheduled:** As requested at the last DA meeting we have scheduled a workshop with Robert Freeman, Chair of the NYS Committee on Open Government to cover the ins and outs of Open Meetings Law, this workshop is particularly targeted towards your trustees: Wednesday, March 23 from 6-8pm in the MHLS Auditorium.
4. **Independent Treasurers for Public Libraries:** Please note that in the new *Trustee Handbook*, vetted by the NYS Division of Library Development, is the following information regarding the treasurer position on your board:

*The office of **Treasurer** varies greatly, depending upon the library’s legal structure. **School district and most special legislative district libraries** must appoint (hire) an independent Treasurer who is not a member of the Board. Under the provisions of Education Law § 259 (1)(a) this independent officer reports to the board and is responsible for the receipt and disbursement of tax monies after Board approval.*

Special legislative district libraries should refer to their enabling legislation for clarification. In the case of school district libraries, the school district treasurer is required to act in this capacity unless the library board appoints its own Treasurer.

***Municipal libraries** that exercise their right under Education Law § 259 (1)(a) to request their tax appropriations be paid over to the library are strongly advised to appoint an independent Treasurer. In the case of municipal libraries where tax funds are held, and invoices are paid by the municipality, the Treasurer of the municipality serves in this capacity.*

The State Comptroller has repeatedly opined that the doctrine of “incompatibility of office” applies to school district, municipal and special legislative district libraries (according to their enabling legislation). This is often applied to the appointment of a board member to the office of Treasurer. In such cases it is considered a best practice to appoint (hire) an independent Treasurer and appoint a trustee as the board’s “Finance Officer” who would oversee the regular audit of claims, chair the board budget committee and otherwise serve in such a capacity.

***Association libraries** are not governed by these restrictions and may appoint a trustee as Treasurer to oversee the receipt and disbursement of library funds, report to the board and otherwise fulfill the duties of Treasurer.*

I am researching best practices of municipal, special district and school district public libraries related to the “independent treasurer issue” and will report back to you.

5. **Review of Minimum Standards for Public Libraries in New York State:** I am co-leading a group along with Wanda Bruchis, Executive Director of the Mid-York Library System that will be looking at modernizing and updating Commissioner’s Regulations §90.2 Standards for registration of public, free association and Indian libraries. These are the standards your library must comply with to maintain your registration with the state. Your registration is what allows you to receive state and local tax dollars. Stay tuned for more info.

6. Upcoming Events:

- a. After the February 5th DA Meeting: **Roundtable for New Directors**. Topic: Sierra & Tech Simplified with MHLS Technology Operations Coordinator Robert Drake
- b. Thursday, February 18th: **Friends Support Group** @Boardman Road Branch of the Poughkeepsie Public Library District
- c. Wednesday, March 2: **Library Advocacy Day in Albany**
- d. Tuesday, March 8th: **County Funding Advocacy Group** @MHLS Auditorium
- e. Wednesday, March 23rd: **Open Meetings Law workshop with Robert Freeman, Chair of the NYS Committee on Open Government** @MHLS Auditorium

Robert Drake, Technology Operations Manager

Technology Operations Overview

1. Sierra Users Guide

- a. Visitors to the Sierra Knowledgebase (kb.midhudson.org) will now see an updated home page showing the Sierra Users Guide, a listing of dozens of guides arranged in the areas of circulation, cataloging, acquisitions, reporting, and reference. These can be viewed either individually or as a single lengthy PDF to hopefully facilitate both your own use and the training of other staff. Don't forget there is also a growing catalog of webinars at the bottom.
- b. The knowledgebase can be reached at <http://kb.midhudson.org>.
- c. This site is password protected. If you have any trouble with your password, please contact techsupport@midhudson.org.

2. 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.

- 3. New Registration Cards:** New English/Spanish Languages registration cards have been designed. We are still working through our prior stock of printed cards, but if you would like to edit or print the newly designed card at whatever size you might choose, both PDF and Adobe Illustrator Versions can be found at: <http://midhudson.org/about-mhls/library-card-registration-forms/>

- 4. Reminder to run Clear Holdshelf Daily: Failure to perform this function continues to** create challenges system-wide. Please make sure this function is run every day you are open.

IT/Technology

- 5. Annual Technology Tasks: If you haven't already, we have a handful of recommended technology tasks to perform annually each year.**

- a. **Update your technology inventory and other network documentation:** Each library should create/update an inventory of their computers, printers, passwords, and software licenses.

A sample inventory can be found at: <http://midhudson.org/topics/resource-sharing/technology-operations/tech-documentation/>

- b. **Check Domain Name Renewal:** If your library has purchased a domain name for your website, you should check with your registrar if it needs to be renewed in the coming year. If you need assistance with this, MHLS can check when your domain is coming for expiration. I will be sending out reminders for the domains I know about after January 1.
- c. **Consider Computer/Equipment Replacement for Coming Year:** Mid-Hudson recommends that all libraries follow a five-year replacement schedule for their staff and public computers.

Sierra/ILS

6. Sierra Questions Webinar:

- a. Automation Coordinator Thomas O'Connell will offer his usual lunchtime webinar of training and Q&A on February 23rd at noon. The topic will be Patron Data Entry! 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.

7. Upcoming Sierra Products

- a. MYLibrary App

MyLibrary! is an Apple iPhone and iPod app that allows patrons to:

- Using the Scan Barcode option, the patron can scan a book's barcode with the device camera. A search for the title is automatically launched in the library catalog and, if the title is available, the patron can immediately place a hold on it.
- Digital content from OverDrive and 3M can be checked out directly from the app, without going to a third-party app or website.
- Patron account information is available, including profile information, checked-out items, holds, and current monies owed.
- Patrons can also search through the library's web catalog. The search results offer up-to-date availability information, and the patron can place holds from the results.

MyLibrary! is available in English and Spanish.

There is an, as of yet undetermined, price for the product.

- b. **Mobile Worklists**

The Mobile Worklist application offers streamlined workflows and new opportunities for paperless efficiency. The app combines interactive lists with mobile access to reduce time spent handling materials and remove manual steps from common tasks. Staff can use mobile devices, such as the iPhone, iPad, and iPod, to scan items and build ad-hoc lists. Electronic lists save paper and enable real-

time updates to the Sierra system.

There is an, as of yet undetermined, price for the product.

c. Sierra Web Client!

A web based version of the Sierra client is coming!

Currently the feature set is limited but full circulation functionality is expected in spring of this year. Details are limited, but staff attending IUG will be hoping to get further details around this functionality. There is no additional cost for this feature.

All of these products do require a version upgrade. This was released in late December and appears to have gone smoothly for libraries that have gone ahead. We are currently hoping to proceed with this upgrade in early to mid-March.

Cataloguing

- 8. Introducing Courtney Wimmers:** I'm happy to announce Courtney Wimmers as our new Cataloging Specialist here at MHLS. Aside from also working at the Pleasant Valley Library, she is currently working on her MLIS through San Jose State University's online program, and should be finished by the end of this year. Before that, she went to SUNY New Paltz and majored in English. She loves to read, play video games, and play with her cats in her spare time. One of her goals is to travel the world. She is very excited to be working as a cataloger and learning new things, and hopes to continue working in the Mid-Hudson Library System for a long time. Please join me in welcoming Courtney to the Cataloging team.