

Consultant Reports
MHLS Directors Association
Meeting of Tuesday April 5, 2016

Merribeth Advocate, Assistant Director

1. **2-1-1 Covers the MHLS Region:** 2-1-1 is an easy-to-remember telephone number for your patrons to call for free and confidential community referral that connects callers with resources providing food, shelter, rent assistance, clothing, child care options and other types of community assistance. Trained referral specialists are multi-lingual and available to help individuals find the help they need. This coordination of information by United Way simplifies access and increases the effectiveness of the health and human services system, increasing the efficiency of government and not-for-profit service providers, and connects people with education and training opportunities. You can also visit their website to find services and organizations to connect with in your community. Check your listing with them and make sure it is up-to-date with services people are looking for.
 - a. Columbia & Greene: <http://www.211neny.org>
 - b. Dutchess, Putnam & Ulster: <http://www.hudson211.org>

2. **Open eBooks:** The White House announced that the Open eBooks app to put eBooks in the hands of lower income children and young adults aged 4-18, is up and running. Librarians, educators, and program leaders working with children and youth from in-need families can sign up with First Book to receive free access to the Open eBooks app. There are 3 simple steps to get started and access Open eBooks:

1. **SIGN UP** – Sign up with First Book at <https://register.firstbook.org/?rgst=openebooks>
2. **REQUEST YOUR FREE CODES** — Visit the First Book Marketplace and request as many free access codes as you need for the number of lower income children you serve.
3. **DOWNLOAD AND ACCESS** — You will then receive an email with the requested access codes and download instructions for the app.



Participating publishers: Bloomsbury, Candlewick, Cricket Media, Hachette, HarperCollins, Lee & Low, Macmillan, National Geographic, Penguin Random House, Simon & Schuster. More information at <http://openebooks.net>.

3. **Completion of Professional Development for Youth and Teen Services:** Congratulations to the following libraries who had staff complete Children’s Services Fundamentals and/or Teen Services Fundamentals (Infopeople Online Learning Courses, approved by ALA's Library Support Staff Certification program) and/or Collaborating with Teens to Build Better Library programs (ALA eCourse), in the past year. This represents in total 324 hours of professional development!

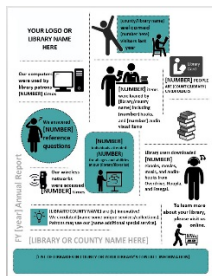
Children's Services Fundamentals	Teen Services Fundamentals	Collaborating with Teens to Build Better Library Programs
<ul style="list-style-type: none"> • Beekman Library • Brewster Public Library • Desmond/Fish Library • Kent Public Library • Roeliff Janson Community Library • Town of Ulster Public Library 	<ul style="list-style-type: none"> • Beekman Library • Brewster Public Library • Desmond/Fish Library • Kent Public Library • Kingston Library • Pawling Free Library • Pleasant Valley Library • Poughkeepsie Public Library District • Roeliff Janson Community Library • Starr Library 	<ul style="list-style-type: none"> • Kinderhook Memorial Library • Mahopac Public Library • Patterson Library • Saugerties Public Library • Tivoli Free Library • Town of Esopus Library

1. Albany Update

- a. By the time of the DA meeting we should know the fate of library aid and construction aid in the new budget.
- b. Heading in to negotiations things were looking very good for libraries. The Assembly and Senate had agreed on a proposal for libraries, something we have not seen before. Their proposal included:
 - i. An additional \$5 million for library aid.
 - ii. An additional \$10 million for State Aid for Public Library Construction
 - iii. \$1.3 million to reimburse libraries who paid the MTA tax last year
- c. Reminder: Once the budget passes, hopefully on April 1, we move to the legislative advocacy portion of the state advocacy season: NYLA 2016 Legislative Agenda:
https://www.nyla.org/max/userfiles/Advocacy/2016_NYLA_Budget_&_Legislative_Priorities_2-26-16.pdf
 - i. Includes a bill of great interest to smaller association libraries to *Permit Collaborative Capital Improvements for Small & Rural Libraries*

2. County Funding Advocacy Report 2016

- a. Summary Report attached
- b. Two new advocacy resources now available on midhudson.org:
 - i. New [annual report template \(MS Word\)](#) now available [Putnam County Library Association]



- ii. Guidelines for [“Real People. Real Dollars.” DIY Campaign.](#) [MHLS]



3. State Aid for Public Library Construction Grant Program:

- a. MHLS Board has set its Funding Priorities for the next State Aid for Public Library Construction grant funding cycle and confirmed their definition of an “economically disadvantaged community”:

M H L S Board Priorities for Funding

To be considered for funding a project must:

1. **Meet eligibility requirements as defined in NYCRR Title 8 – Education §90.12**
[http://www.nysl.nysed.gov/libdev/excerpts/finished_regs/9012.htm]

2. **Be part of the library’s board approved, prioritized facility plan** which is reported to MHLS through the Construction Needs Action Memo issued annually in April. If a library is breaking a large project into phases this must be itemized with a timeline within the facility plan, and

3. **Provide for at least one of the following outcomes (points are awarded for each outcome the project addresses, so, the more the better!):**
 - **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

 - **An increase in access** (e.g., compliance with the Americans with Disabilities Act (ADA); improved broadband; optimization of a space to bring in a new or underserved population); and/or

 - **Energy conservation in the context of a professional’s recommendations or with an historic preservation element.** For the purposes of the MHLS 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). Libraries are expected to comply with the MHLS *‘Useful life energy conservation standards’* for the purposes of this grant; and/or

 - **Disaster recovery** in the context of a substantial loss of access to library services due to a low probability-high consequence event(s) (e.g., fire, flood). This will apply to libraries: (1) located within a declared state or federal disaster area, or (2) not located within a declared disaster area if sufficient evidence documents a low probability-high consequence event resulted in substantial loss of access to library services. Within the grant narrative the library must adequately describe: a) length of forewarning; b) magnitude of impact; and c) duration of impact, meaning lack of access by the public to library services; and/or

 - **Leadership in sustainable design** in the context of pursuit of certification through the Leadership in Energy and Environmental Design program (LEED); Green Globes; Living Building Challenge; Energy Star; Net Zero Energy Building Certification and/or Passive House.

Economically Disadvantaged Community Definition

The MHLS Board has generated the following definition of what an “economically disadvantaged community” will qualify as in our region to comply with the amended legislation that allows for state aid to be provided up to 75% for buildings/public libraries located in such a community.

Application requests greater than 50% need to demonstrate how the project will address the service needs of one or more economically disadvantaged communities. A library would need to fall within one of the three definitions listed in order to qualify for the lower match requirement.

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.

b. Preparing for Construction Grant Season:

- b. Create or update your library's **board approved, prioritized facility plan**. This plan is now a required submission with the construction applications. Libraries working on large projects for which they would like to apply for smaller, phased portions of through the grant program should itemize the phases in their facility plans and note the projected timeline of the phases. Sample plan outline is available: <http://midhudson.org/wp-content/uploads/2013/04/Facility-Plan-Outline.docx>
 - c. If you haven't already, have a **NYSERDA Energy Audit** [<http://www.nyserda.ny.gov/All-Programs/Programs/Small-Commercial-Energy-Assessments>] done to help inform your facility plans. Evidence of this audit is required to earn the energy conservation point in the MHLS Board's grant ranking process to calculate recommended award amounts.
 - d. Sign up for the **April 12th introductory webinar**, this webinar will introduce the program, eligible projects, MHLS priorities, the application process and more.
 - e. Fill out the **Construction Needs Action Memo** which will be sent to you via the MHLS Alerts list this month. This memo is required to be submitted to be considered for the grant. **PLEASE NOTE: All libraries are expected to submit their construction needs to MHLS, regardless of your intent to apply for the grant program. MHLS is required to submit a report to NYS on the total amount of construction need in our System annually to assist with advocacy efforts for the aid program.**
 - f. The state usually opens the grant portal in June. MHLS has scheduled a technical assistance workshop for June 7th to walk you through this year's application. Grant deadline for member libraries will be set once the state notifies the System of the System deadline.
4. **Reminder: MHLS Action Memo #16-01 - Calculating Impact: Minimum Wage Increase is due Friday, April 29th**. This action memo, sent out to all directors via the MHLS-ALERTS list, is designed to help libraries calculate the impact of the Governor's proposed increase to the minimum wage in New York to \$15 per hour. While likely to be phased in over a number of years, this change has the potential to have a big impact on many MHLS libraries' budgets.

- a. **Please note:** If passed, the implementation proposal the Governor has submitted would see a \$15 minimum wage instituted by the end of 2018 in New York City and by July 2021 in the rest of the state, likely following the graduated schedule as the increase to \$9 did, meaning an incremental bump each year between passage in Albany, which could be as early as this year, and 2021.
5. **A threat to 259 and 414 votes:** The DeWitt Community Library near Syracuse has accrued \$35,000 in legal bills fighting a lawsuit that challenges the library's right, as an association library, to put their tax levy up for a vote using the school ballot mechanism, also known as the 259 vote. The lawsuit challenges §259 of Education Law, which also contains the language authorizing libraries to use the municipal ballot option, also known as the 414 vote. The New York Library Association has started a campaign to raise funds for their Legal Defense Fund to support DeWitt as this lawsuit is escalated. Given that the outcome of this lawsuit can either strengthen libraries' right to hold a public vote or, potentially, invalidate libraries' right for a public vote I am urging all of us to consider a donation to the NYLA Legal Defense Fund on behalf of DeWitt. Learn more here: <https://www.nyla.org/max/donate/formnldf.html>
 6. **414/259 Vote Planning:** If your library is planning to pursue a 259 or 414 vote in 2016 please let me know. So far on my list:
 7. **Upcoming Events:**
 - a. Tuesday, April 12th: **Introduction to the State Aid for Public Library Construction Program** [webinar]
 - b. After the May 5th DA Meeting: **Leadership Circle for Directors**
 - c. **Essential Trustee Duties & Responsibilities:**
 - i. Friday May 13, 10:15a-12:30p @MHLS Auditorium
 - ii. Saturday, May 14, 10:15a-12:30p @Starr Library (Rhinebeck)
 - iii. Saturday, May 21, 10:15a-12:30p @Cairo Public Library
 - iv. Wednesday, May 25, 5:30-8:00p @Mahopac Library
 - d. Wednesday, May 25th: **Getting It Started: Creating a Friends Group for Your Library** (offered in partnership with the Ramapo Catskill Library System) @Newburgh Free Library
 - e. Thursday, May 26th: **Friends Support Group: Keep It Going! Strengthening Your Group** with Lisa Wemett & Terry Mulee of the Friends of Libraries Section of NYLA @MHLS Auditorium
 - f. After the June 2nd DA Meeting: **Roundtable for New Directors**
 - g. Tuesday, June 7th: **Construction Grant Technical Assistance Workshop** @MHLS Auditorium
 - h. **NEW DATE:** Tuesday, September 13th: Planning Programming that Pops! With Janie Hermann of the Princeton Public Library

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

2. E-Rate

- a. Final Reminder on E-rate's filing deadlines.
 - i. Filing Deadline Form 470 – April 1st
 - ii. Filing Deadline Form 471 – April 28th
- b. This year there are some challenges with whether libraries are indicated in the EPC portal as Libraries, Library Systems or Consortium. Unless a library has branches, it appears Library is the appropriate designation. If this is listed incorrectly in your application portal, it is necessary to contact USAC for the change.

Sierra/ILS

3. Mobile Worklists?

- a. Sierra has development a mobile app (iOS only) called Mobile Worklists which potentially facilitates weeding, updating records, and other tasks requiring custom lists. We are currently investigating this product and would be interested in what if any interest exists system wide. A video demonstrating the functionality can be found at <https://www.iii.com/community/videos/872>

4. Sierra Release Notes

- a. We upgraded to version 2.1 on March 24th. A small selection of fixes and features:
 - i. In Create Lists, there is a new "Import Records" button will import a text file of record numbers and populate a review file with that list of records.
 - ii. Selecting a record from a review file should open that record in View or Edit mode, but the record summary is displaying instead.
 - iii. In the SDA, Check Out (Circulation Desk), Fines tab, clicking the Print button prints the table of outstanding fines. This printout will now include the total amount owed by the patron (sum of outstanding charges).
- b. We are not looking to schedule the Encore 4.5 update. No down time is expected. This update is expected to include a Genre Facet.

5. Sierra Questions Webinar

- a. Automation Coordinator Thomas O'Connell will offer his usual lunchtime webinar of training and Q&A on April 19th at noon. The topic will be the **Item 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.

6. **IFTTT**

- a. 'If This Then Than That' is a free service you can use to connect apps and services. Common examples: send an email whenever an RSS feed is updated, save photos you (or perhaps your library?) are tagged in facebook to a dropbox folder, or receive text reminders when the international space station is overhead. Thousands of 'recipes' exist which might help you save time between websites and tools, or tips you might pass along to patrons in a program. Links & a few example:
 - b. **Main site:** <https://ifttt.com/recipes>
 - c. **Facebook to Dropbox Example:** <https://ifttt.com/recipes/15-save-new-facebook-photos-you-are-tagged-in-to-dropbox>
 - d. **Automatically Save Attachments to Dropbox:** <https://ifttt.com/recipes>

County Funding Advocacy Meeting | 2016

County	Amount Received (2016)	How this compares:	What fund are used for	Timing/Key Players
Columbia County (11 libraries)	\$67,700	2015: \$57,000 2009: \$65,000; 5% down over each of the past two years	2016: \$62,700 divided evenly amongst libraries; \$5,000 to purchase digital materials that will be accessible to all county residents 2015: Divided evenly amongst libraries; to be used at their discretion	Decision Makers: Board of Supervisors Influencers: Governance Committee oversees library aid from the county; town supervisors Timing: Decision made in the last quarter of the year; year round outreach with town supervisors Conduit: Columbia County Library Association (becoming more active); Columbia County Directors meetings (ad hoc)
Dutchess County (22 libraries)	\$0	2015: \$0 2014: \$30,000 2009: \$249,893	2014: 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: County Executive; Planning and Development Commissioner (Eoin Wrafter); Community Development Advisory Committee; county legislators Conduit: Dutchess County Directors meetings (ad hoc with bylaws); PPLD serves as pass through

<p>Greene County (8 libraries)</p>	<p>\$32,700</p>	<p>2015: \$32,700</p> <p>2009: \$39,000; past four years @\$32,700; anticipating level funding for 2015</p>	<p>2016: -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</p> <p>2015: (same as above)</p>	<p>Decision Makers: County Administrator (hired by the legislator) & County Legislature</p> <p>Influencers: Education Committee oversees funding</p> <p>Timing: Budget request due in the fall; used to accompany this with a presentation; Supply an annual report to the legislature in February</p> <p>Conduit: Greene County Library Association</p>
<p>Putnam County (8 libraries)</p>	<p>\$435,707</p>	<p>2015: \$400,000</p> <p>2009: \$368,116;</p>	<p>2016: \$380,907 divided proportionally based on population among libraries to be spent at their discretion. The rest goes for the databases purchased through Mid-Hudson, e-books and downloadable audiobooks through Overdrive, homework help, Internet access, Ancestry Library, literacy materials, and reference materials for the Mahopac Library.</p> <p>2015: Similar to description above.</p>	<p>Decision Makers: County Executive (elected) & County Legislature (9 members)</p> <p>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 op/press release for National Library Week); ongoing: *visible presence at the legislature meeting routinely – sit together, wear identifying buttons/stickers; bring teens to speak publicly</p> <p>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); PCLA is routinely in touch with the county executive</p> <p>Conduit: Putnam County Library Association (501c3)</p>

<p>Ulster County (17 MHLS libraries/21 total)</p>	<p>\$74,250</p>	<p>2015: \$74,250 2009: \$90,000 This is a line item in the county budget rather than considered one of the “outside contract agencies”</p>	<p>2016: Supports the county InfoPortal [http://uclib.org/infoportal/] Pays for Ulster County share of MHLS database and ebook charges; \$1,000 towards publicity 2015: (Same as above.)</p>	<p>Decision Makers: County Executive (elected) & County Legislature (# of members?)</p> <p>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)</p> <p>Influencers: *Programs Committee meetings; get on their agenda to update them, build case for ask; routinely invite county legislators to libraries</p> <p>Conduit: Ulster County Library Association (501c3)</p>
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County Advocacy Techniques: What Works?

- Show up. Be visible. Make sure they know your name.
- Keep things basic; do not assume they know anything about libraries
 - Check out the new annual report template (MS Word) now available to all libraries thanks to the Putnam County Library Association!
<http://midhudson.org/topics/sustainable-libraries/marketing-pr/>
- 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 and teens
 - 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 as the foundation of 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
 - See guidelines for “*Real People. Real Dollars.*” DIY Campaign. [MHLS]
<http://midhudson.org/topics/sustainable-libraries/marketing-pr/>
- Understand who knows who and who is best to speak with/influence a particular stakeholder
- Invite legislators to your county-based events and to local libraries – routinely
- 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 visible county wide, like at the county fair!
- 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. Example messages:
 - 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