

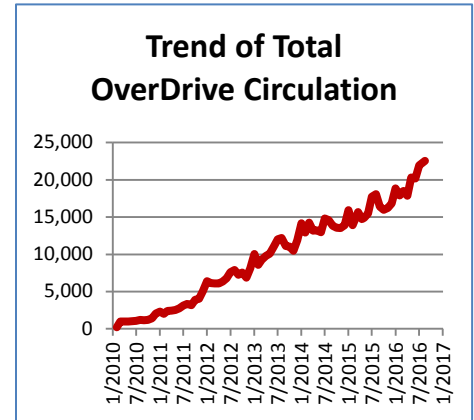
Consultant Reports
MHLS Directors Association
Meeting of Thursday October 6, 2016

Merribeth Advocate, Assistant Director

1. Digital Collection Access - In support of MHLS Digital Collection Access efforts, which focus on access to shared digital collections for all member libraries:

- **OverDrive eBooks & eAudiobooks:**

- A reminder that at the Central Library/Collection Development Advisory Committee has been discussing the OverDrive service and a [Working Paper on OverDrive Circulation and Budget](#) has been developed, which provides the background/foundation working assumptions about OverDrive use and funding. This provision of eBooks and eAudiobooks through a central portal for all MHLS library patrons was established in 2010 and has proved highly successful as measured by patron demand, with circulation increasing each year. Currently, the [MHLS OverDrive Collection Development Guidelines](#) for the cost-share funds



- cannot be followed because it dictates a standard of new titles plus holds fulfillment that cannot be supported by the current funding. The MHLS Central Library/Collection Development Advisory Committee will use the information in this working paper to develop a proposal on sustainable OverDrive service, funding and operations.
- The \$12,000 of MHLS unassigned funds that was recently put into the program (as per the recommendation of the SSAC and approved by the MHLS BOT), will be proportioned out by week in 2016, and (as per the guidelines) will be used to buy new titles from the NYT fiction bestseller list, and applied as far as they stretch to reduce the fiction holds que.
- Each month MHLS generated usage statistics by library are posted on midhudson.org under Topics (or get there directly at <http://midhudson.org/topics/statistics-research/overdrive-usage-statistics-by-library/>)
 - There you will also see directions for some of the many reports you can run. **Recently there has been a great interest in the report on ‘titles that patrons from your library are currently on the waiting list for’. This report can also be run by county.** Please note that to determine what to repurchase based on holds, note the following two points. In the report you will see that some titles have a number in the ‘Own’ column, but others (that are **metered** by time or number of checkouts) show a number of licenses.
 - Metered titles: If you sort the Own column in ascending order (so all the zeros come to the top), those zeros indicate metered titles. If a metered title has no number in the ‘Licenses left’ column, the title needs to be repurchased for your patron to get their hold filled.
 - Owned titles: You will want to look at the ratio of copies/holds to determine if you want to order an additional copy. To do so, sort the report by the Ratio column in

descending order (so the highest numbers appear at the top). For any that have above a high holds ratio you may want to consider purchasing an additional copy.

- **‘Zinio for Libraries’ eMagazines:**
 - Each month MHLS generated usage statistics, which are collected by library patron barcode range, are posted on midhudson.org under Topics (or get there directly at <http://midhudson.org/topics/statistics-research/zino-usage-statistics-by-library/>.)
 - There you will also see a listing of what are the most popular eMagazines system wide. A reminder to individual libraries and counties that funded titles – you will be contacted this fall about what renewals you are choosing to fund.
 - If you would like more access to the statistics (to see eMagazines your patrons have checked out in a specific time period, or who are the new patrons from your library who have registered with Zinio in a specific time period) contact me to schedule a 20 minute training session on the Zinio admin interface. We can do this over the phone.

Rebekkah Smith Aldrich, Coordinator for Library Sustainability

1. **Essential Documents Inventory Report:** Thank you to all libraries who are working on their Essential Documents and who responded to the MHLS 2016 Essential Documents Inventory Action Memo. We continue to see progress in the number of libraries that now have critical documentation in place to help govern their library’s operations and minimize liability. Trends of note this year:
 - 24% increase in the number of libraries that adopted a **Conflict of Interest policy**. There are still more than 25 libraries missing this policy completely as well as libraries that have a currently adopted version that does not meet the requirements under the NYS Nonprofit Revitalization Act which went into effect July 2014. **PLEASE NOTE: This policy, with specific inclusions, is required by law. Learn more through this informational sheet from the New York State Library’s web site:** <http://www.nysl.nysed.gov/libdev/trustees/coi-wb.pdf>
 - A focus over the past few years has been to help member libraries improve their **internal financial controls**. While there was noticeable improvement in this area there is still *a lot of work to be done*. Less than half of member libraries have policies to oversee credit card usage, petty cash, the claims audit process, or an audit/review schedule. Just 8 libraries reported documentation to define their reserve funds, just 3 have a policy related to online banking and wire transfers. **These are policies and procedures that the Office of the State Comptroller (OSC) will be auditing all public libraries on.** Now is the time to prioritize the work in this area of your policy manual. There is guidance and samples through the MHLS web site as well as links to the OSC Local Government Management Guides: <http://midhudson.org/topics/director-resources/policies/> This will be an area I will continue to focus energy on.

- There were tremendous strides reported in the number of libraries that now have a **board approved facility plan** in place, in the past two years more than 20 libraries worked on this and now 27 member libraries have this helpful plan in place to help prioritize work to be done on their facilities and to better position themselves for grants, including State Aid for Public Library Construction. If this is still on your to-do list, don't forget, a **sample outline for a facility plan** to get you started is available on the MHLS web site: <http://midhudson.org/topics/director-resources/facilities/>
- There was a 60% increase in the number of libraries that now have:
 - **“Vulnerable Adults” policy**
 - **patron complaint process**
 - **continuing education requirements for trustees**
 - **bylaw language related to the removal of a trustee**

2. NYLA Bulk Membership Order Update: Invoices have been sent to all participating libraries. Please remit the required paperwork with your payment to the MHLS Business Office:

- Associate Member Worksheet
- Trustee Registration Form

In the interim:

- If you receive a membership renewal form from NYLA just ignore it. Respond to the MHLS invoice to ensure you receive the discount.
- If your membership is lapsed and you want to register for the 2016 NYLA Conference in Saratoga as an organizational member just note that you have an organizational membership pending via MHLS in the notes field when registering. NYLA will adjust your total to reflect the member pricing.

3. Getting ready for the 2017 MHLS Real People. Real Dollars Campaign: The New York Library Association's **Library Use Value Calculator** [<http://bit.ly/2db2WH4>] has been updated and now includes two new values thanks to the MHLS Marketing Advisory Committee

- eMagazines Downloaded
- WiFi Connection
 - Have idea for a value? Send it my way and we'll talk to NYLA about getting it added. Check out what's already there at <http://bit.ly/2db2WH4>

4. New York Library Association's Sustainability Initiative (NYLA-SI)

- **There are a few seats left** for the full day Continuing Education Opportunity at the 2016 NYLA Conference in Saratoga Springs, NY on Wednesday, November 2: **Libraries – A Powerful Platform for Change**

- **Weekly Sustainability Spotlights:** <http://www.nyla.org/sustainability>
- **Get Certified!** NYLA is partnering with the Westchester Green Business Council and the New York State Energy & Research Development Authority (NYSERDA) to provide access to a tool that will help your library incorporate environmentally sustainable practices into operations and ultimately achieve certification as a Sustainable Library. An informational event to learn more will be held on **Wednesday, October 26, 2016 from 11:30 AM to 2:00 PM Montrose, NY at the Hendrick Hudson Free Library** - Westchester's first WGB-Certified library! At this event you will learn more about a pilot program launching in 2017 through NYLA to become certified as a Sustainable Library and to have your library's registration fee waived for the Westchester tool! To learn more and to register: <http://www.eventbrite.com/e/green-business-roundtable-for-westchester-nys-public-library-leaders-registration-27152117715>
- **Coming in 2017:** NYLA-SI Pilot Library program – an opportunity to test new tools to help your library become more sustainable using the guideline of the “Triple Bottom Line” (economic feasibility, environmental stewardship and social justice) with incentives to help underwrite the cost of certification as well as first dibs on the “Agents of Change” program.
- **Learn more about the NYLA Sustainability Initiative** at <http://www.nyla.org/sustainability>

5. Support for Friends Groups;

- **National Friends of Libraries Week:** Friends of Libraries groups have their very own national week of celebration! United for Libraries will coordinate the 11th annual National Friends of Libraries Week **October 16-22, 2016**. 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. Explore ideas and resources: http://www.ala.org/united/events_conferences/folweek
- **Friends Day at the NYLA Conference:** Did you know? **The registration fee is just \$30 for any one single day admission** to the conference for the following NYLA member types: personal members at the Friend level and individuals belonging to an organizational member Friends Group including the primary contact for the group (voting member) and the elected officers of that Friends Group who have been registered as non-voting members of NYLA. The conference registration entitles participants to an entire day of workshops sponsored by FLS and other NYLA Sections, Roundtables, and Affiliates plus a great trade show* of library-related vendors. *The trade show is not open on Saturday. On **Friday, November 4th at the Conference:**
 - 11 a.m. – 12:15 p.m. | Friends Grow Friends Online
 - 2:15 - 3:30 p.m. | Book Sale Bonanza
 - 3:45 - 5 p.m. | Friends Showcase

The FLS annual membership meeting, including the announcement of the Dan Casey Award winner and installation of the 2016 Executive Board, will begin the session, followed immediately by the program.

- **MHLS Friends Support Group – two locations to choose from:**

- Monday, November 7th from 5:30-7:30pm at the Hudson Area Library
- Thursday, November 10th from 5:30-7:30pm at the East Fishkill Community Library

6. [Yes, I'm providing this again...] **Tax Cap Reminder:** The 2017 inflation factor for those with a January 1 – December 31 fiscal year has been announced by the Office of the State Comptroller. It is **0.68%**. This is the second year in a row it is below 1%.

- This applies to all libraries that have ever had a public vote on their budget. Even if you aren't planning to hold a vote this year.
- To calculate your library's cap amount:
<https://www.osc.state.ny.us/localgov/realprop/localgovernments.htm>
- Reminder: Libraries are considered "local governments" in the eyes of this law. As such, you must submit your form sometime between when the form becomes available (which it looks to be now) and prior to the adoption of your 2017 budget.
- 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
- A reminder that the tax cap form must be filed
 - between when the form becomes available and prior to adoption of your budget for libraries with a calendar fiscal year (Jan-Dec)
 - by March 1 for libraries with a school fiscal year (June-July)
 - A primer on the Tax Cap for libraries is available from MHLS at
<https://www.youtube.com/watch?v=-hJ2GjiZ2hA&feature=youtu.be>

7. **Archived Webinars** – Did you miss one of the webinars MHLS offered this year? Don't despair – many are archived at <http://midhudson.org/topics/professional-development-continuing-education/>. Currently available for on demand viewing:

MHLS Engage! Webinar Series

- [Community Engagement Works!](#) [MHLS]
- [Phoenicia Rising](#) [Phoenicia Library]
- [Democracy in Practice](#) [Red Hook Public Library]
- [Outside the Library](#) [Highland Public Library]
- [DIY Coding Program](#) [Desmond-Fish Library]

[Outside the Lines – Libraries Reintroduced](#)

[Tips for Improving Productivity Webinar](#)

[Property Tax Cap Refresher Webinar](#)

8. Upcoming MHLS Workshops & Webinars:

- **The Inside and Outside of Evaluations** - How they impact planning, growth and funding webinar with Dr. Terry Kirchner: How to tie director and board evaluations with your library's vision and long range planning in order to produce meaningful results: Webinar October 12 (this event will be archived)
- **How to Deliver Great Library Customer Service** with Laurie Brown – group viewing of an ALA webinar with 3 locations to choose from on October 13 from 2:30-4:00pm:
 - Cairo Public Library
 - Desmond-Fish Library (Garrison)
 - MHLS Auditorium
- **Essential Trustee Duties & Responsibilities**
 - Tuesday, October 18th from 10:15am-12:30pm @Germantown Library
 - Wednesday, October 19th from 5:30-8:00pm @MHLS Auditorium
 - Thursday, October 20th from 5:30 – 8:00pm @Heermance Memorial Library in Coxsackie
 - Saturday, October 22nd from 9:30 – 11:45am @Kingston Library
- **MHLS Friends Support Group**
 - Monday, November 7th from 5:30-7:30pm at the Hudson Area Library
 - Thursday, November 10th from 5:30-7:30pm at the East Fishkill Community Library
- **Social Media Tune-Up: Little Tweaks That Make a Difference** Webinar with Sophie Brookover, Program Coordinator & Social Media Manager for LibraryLinkNJ Tuesday, December 6th from 10:00 – 11:30am online (This event will be archived)

Robert Drake, Technology Operations Manager

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.

2. Syracuse Transition: Our Sierra server is moving to the Syracuse the night of October 11th. We have contacted all libraries that we expect need to make changes in preparation for this transition however please note the following items for the morning of October 12th.

- **ALL LIBRARIES**
 - No downtime expected
 - Please report any issues to techsupport@midhudson.org

- Paging lists will likely be unusually light early in the day.
- Acquisition vendors are being contacted, but additional changes may be necessary. Please report issues transmitting carts.
- Specific other issues to look for: bounced emails, odd or incomplete search results, hidden or missing information on patron accounts. These are signs of incomplete indexing that may need to be finalized.
- **Libraries SAM / Envisionware**
 - Configuration changes have to be made. If you use SAM and have not been contacted, MHLS will be making this change on your behalf.
 - Please test that SAM/Envisionware works after the transition.
- **Libraries with API Authentication Databases**
 - Configuration changes have to be made. If you have databases that use the Patron API and have not been contacted, please let us know ASAP. Most databases do not use the patron API. The main exceptions are: Freegal, Hoopla, Lynda.com
- **Other**
 - **ULSTER COUNTY LIBRARIES:** We have spoken with Michael Bourse about the Ulster County App. Please test this the morning of October 12th.
 - **MARLBORO & BEACON:** Self Check is not expected to require any changes. Please test this the morning of October 12th.

3. **Computer Equipment cannot be Purchased in December:** Due to changes in MHLS business office policy, **orders for computers and other equipment can no longer be processed from December 1st to December 31st of each year.** If you have plans to purchase equipment at the end of the year, it must be received prior to these dates in order to be purchased and invoiced within 2016. No exceptions can be made. As always, our order form can be found at: <http://midhudson.org/topics/resource-sharing/technology-operations/tech-purchase-form/>

4. **Cablevision/Optimum Speeds:** If you are a cablevision/optimum library are not on an Educational account, you may have an opportunity for higher speeds or lower costs. The current packages for education institutes are:

- Base up to 25mbps download/5mbps upload for a computer/security camera @ \$69.94/month
- Ultra 60 up to 60 mbps download/ 25mbps upload for a medium network = \$89.89/month
- Ultra 101 up to 101mbps download/ 35mbps upload for a med/large network = \$119.94/month

Static IP Packages available for either Ultra product:

1 Static IP = \$15.00; 5 Static IP's = \$30.00; 13 Static IP's = \$55.00; 29 Static IP's = \$75.00

- To take advantage of these rates, please contact the Government/Education/Medical Account Manager for our region Matt O'Hare.
 - Office: 201-651-4055 Mohare@Cablevision.com

5. Sierra Tips and Tricks

- On Thursday September 22, MHLS hosted a panel workshop for anyone who regularly uses Sierra. Thirty nine staff from various libraries attended the workshop. Pam McCluskey of the Alice Curtis Desmond and Hamilton Fish Library spoke about common Sierra errors and how to fix them, Katie Scott-Childress of the Olive Free Library enlightened us to the use of High Demand Holds, and Daniela Pulice of the Pleasant Valley Library showed us some of her tricks to locate missing books, and more.
- This panel and colleague training format is something that we will likely explore more in the future. If you have a topic you would be willing to train on, please contact Thomas O'Connell at toconnell@midhudson.org.

6. Sierra Questions Webinar

- Automation Coordinator Thomas O'Connell will offer his usual lunchtime webinar of training and Q&A on October 27th at noon. Due to the popularity of last month's session, the topic will again be Updates to Create list Sierra 2.2! 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.
- 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. This session is open to all member library staff members!