Merribeth Advocate, Assistant Director

*Digital Collection Access*

1. **OverDrive E-Books & E-Audio – 3 elements to incorporate into your purchasing to meet the needs of your patrons**

1. **Your Patrons Have Holds on Metered E-Book Titles that are Scheduled for Deletion Unless Repurchased:** A reminder that as per the DA, for any metered access title with zero checkouts left or zero days left, MHLS will remove the title from the OverDrive collection and delete the bibliographic record from the MHLS catalog and cancel the existing holds on **June 15**. Any patron notification of holds being cancelled is the responsibility of the local library. Ongoing, MHLS will run this process on or after the first of each month, starting August 1.

2. **Your Patrons Have Asked for New Titles they Would Like Your Library to Purchase:** A reminder that as per the DA, the built-in OverDrive ‘Recommend to Library’ has been enabled so that individual libraries would be able to get recommendations from their patrons of OverDrive titles that would like the library to purchase. In the past 2 months, over 2,000 patron recommendations have come through.

3. **You Can Jump Your Patrons to the Front of the Holds Queue by Purchasing through an Advantage Account:** A reminder that the DA approved a service enhancement that enables "Local Preference" for filling holds, just like our online catalog does for the physical collection. "Local Preference" means that for items purchased by an individual library, that library's patrons have "first dibs" on those items. Regardless of how many holds may be on that item, your library's patron receives your library's items first. These OverDrive Advantage accounts are available to every member library.

   i. **If you already have an Advantage account,** no action is needed. The DA approved settings were applied at the consortium level and every Advantage is automatically opted in.

   ii. **If you do not yet have an Advantage account,** email our OverDrive Collection Development Specialist Kristin Preyss (kpreyss@overdrive.com) for the enrollment form. At this point OverDrive is continuing to offer enrollment for the price of 3 curated titles.

**Clarification of County Advantage Accounts:** We have received verification from OverDrive that while individual library Advantage accounts are possible, and county Advantage accounts are possible, a library cannot be part of 2 Advantage accounts. This is because it the additional layers of authentication creates problems. So all the libraries in a county could have a county Advantage account, but that means they could not have individual library Advantage accounts.

**Monthly Statistics:** Each month MHLS generated OverDrive 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/](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 including the report on ‘titles that patrons from your library are currently on the waiting list for’.
2. **New Interface & New Name Coming for Zinio E-Magazines - RBdigital**
   a. **New App Coming in June**: Once the new RBdigital app is made available within iTunes and Android App Store, patrons with the current Zinio for Libraries app will receive notification that the new app is available. Within that message, the link for the new app will be provided so your patrons will not be required to search for the new app. The previous Zinio for Libraries app will remain downloaded and active on their phone for several months following the launch of RBdigital; however, that app will eventually be disabled. Download print-ready and digital images at [https://www.recordedbooks.com/Resources/Marketing-Materials/Digital-Resources/Magazines](https://www.recordedbooks.com/Resources/Marketing-Materials/Digital-Resources/Magazines).
   
   
   c. **2018 Collection – Title renewals/deletions due by October**
      i. The collection is currently fully funded with support from New York State (through Central Library Development Aid and Central Book Aid), Columbia County Library Association, East Fishkill Public Library District, Poughkeepsie Public Library District, Putnam County Library Association and Ulster County Library Association.
      
      ii. Libraries and county associations that provide funding for Zinio titles need to have any additions or deletions to the 2018 collection to me by October.
   
   d. **Monthly Statistics**: 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/](http://midhudson.org/topics/statistics-research/zino-usage-statistics-by-library/).) 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 phone training session on the Zinio admin interface.

3. **NOVELny Databases – changes effective July 1**
   a. Provided by the New York State Library to every library in the state, NOVELny databases are funded by with temporary federal Library Services and Technology Act funds from the Institute of Museum and Library Services (IMLS). The changes listed below have been announced, effective July 1. MHLS Tech Support will update the library websites hosted by MHLS and the county E-Resources pages ([http://midhudson.org/for-the-public/databases/](http://midhudson.org/for-the-public/databases/)). URL’s for libraries that manage their own website will be available closer to the date.
      
      i. **New**: Research in Context (Gale, a Cengage company)
      
      ii. **New**: Encyclopedia Britannica (Britannica Digital Learning, a division of Encyclopædia Britannica, Inc.): Includes Britannica School, Britannica Academic and Britannica Escolar
      
      iii. **Removed**: eLibrary Elementary, Scholastic Go! and Gannett Newsstand Complete

4. **New App Available Now for TumbleBooks**
   a. All MHLS member libraries have access to TumbleBooks and now there is a new app to access them – available for both Apple iOS and Android devices. It is set up to work with all MHLS member library barcodes. If you find it is not working for you, please let me know what barcode number you are using.
Coordinated Outreach

5. MHLS Outreach Mini Grant Program 2017 – applications due August 11
   a. NYS Outreach Categorical Aid funds, received from the NYS Library Division of Library Development, will be used to fund mini-grants of up to $2,000 per member library to develop programs and services to attract and connect to outreach target populations and form relevant community partnerships at the local level.
      i. Outreach target populations [as defined in Education Law §273 (1) (h) (1)] are those who are educationally disadvantaged, members of ethnic or minority groups in need of special library services, unemployed, blind, physically disabled, have developmental or learning disabilities, or who are aged or confined in institutions.
   b. Applications, Mini-Grant Information and Requirements available at https://tinyurl.com/MHLSOutreach-2017

Communication Among Member Libraries

6. Advisory Committee Membership – attached is an updated listing. A reminder that membership for each of the committees is chosen by each county’s directors association. Committee membership terms are 4 years. To ensure leadership is present, terms are staggered so the entire committee will not roll over at one time. Half of the members in each committee have a term ending December 2017. County Chairs – please report to me in November who will be filling those slots for 2018-21

Awareness & Advocacy

7. Funds for Assembly District 106 for Summer Reading Program – This month the 16 public libraries in Assembly District 106 will each receive a share of a $20,000 Special Legislative Project Grant sponsored by Assemblymember Didi Barrett to support summer reading programs.

Interlibrary Loan (ILL)

8. Request for Comments on the Proposed Revision of Regional ILL Code – due by June 14
   a. The Southeastern NY Library Resources Council region (Columbia, Greene, Ulster, Dutchess, Orange, Sullivan, Putnam and Rockland counties) has maintained a Regional Interlibrary Loan Code to govern interlibrary loan since the mid-1980s, last updated in 2002. A revision is now proposed by their Regional Interlibrary Loan Committee (RIC) for 2 reasons: There are parts of the regional code that are no longer applicable, and there have been many updates to the “Interlibrary Loan Code for the United States”.
   b. What is being recommended is that the region adopt the “Interlibrary Loan Code for the United States” with its “Explanatory Supplement” and a short document of regional specifications and exceptions. The document is available at http://www.senylrc.org/ProposedILLCode. Librarians and interlibrary loan staff in the region are asked to review and comment on the proposed document (email comments to ILL@senylrc.org by June 14). After a time of review and comments, RIC will meet to consider all comments and make changes to the document as appropriate. Then, RIC will ask for regional approval of the code by all eight regional library systems in fall 2017.

9. Your Library May be Using ILL Dummy Cards Incorrectly
   a. ILL Dummy Cards allow for the tracking of out-of-system ILL materials through Sierra. This provides an easy-to-find and organized method of keeping all important ILL information together, gives an indication in the patron’s record that they have an ILL item checked out, and is a great asset for your annual report statistical records.
ii. Item Dummy Cards are to be used when an item comes to your library, from out of the MHLS system, for your patron.

iii. Patron Dummy Cards are to be used when you are sending items outside of the MHLS system.

b. When reviewing the member library annual reports, it became evident that some libraries are using ILL Dummy Cards incorrectly, and additionally are sometimes using them for a variety of things that they should not be used for (for example bookclubs, storytimes, local schools - techsupport@midhudson.org can give you suggestions on how to track these appropriately). This affects the statistics from your library for your annual report to the state.

c. Instructions on the proper use of ILL dummy cards are available in the MHLS Sierra Knowledgebase at http://kb.midhudson.org/wp-content/uploads/2016/01/Outside-ILL-Procedures.pdf and are also attached to this report.

Cooperative Efforts with Other Library Systems

10. Fall Into Books 19th Annual Children’s & Teen Literature Conference – early bird discount deadline July 29

a. Early Bird Registration must be postmarked by July 29, 2017 for the Fall Into Books 19th Annual Children's & Teen Literature Conference being held on October 25 at the Best Western Plus Kingston Hotel and Conference Center. Information and registration at http://midhudson.org/fall-into-books/

b. Held annually, Fall Into Books brings together school and public librarians from eight counties within the Hudson Valley for a day of literacy, discussion, networking and insight. This collaborative event (sponsored by MHLS, RCLS, SEnYLRc and the following BOCES School Library Systems: Dutchess, Orange-Ulster, Rockland, Sullivan, Ulster) features book discussion sessions (ranging from picture books to young adult), Keynote Speaker Christopher Wyble, Professional Development Coordinator for GLSEN Hudson Valley, author presentation from Kwame Alexander, a book sale and a buffet lunch. This conference provides an excellent opportunity for attendees to engage in collaborative discussions on children’s and teen literature.

Rebekkah Smith Aldrich, Coordinator for Library Sustainability

Awareness & Advocacy

1. State Legislative Session Update

a. ACTION ITEM: Bullet Aid requests should be delivered to your Senators ASAP.

b. NYLA Legislative Priorities:

   ▪ Guarantee Students’ Rights to School Libraries and Librarians
     • A.6023 Solages / No Same As
       o Currently in Assembly Education Committee

     • S.3024 Ritchie / No Same As
       o Currently in Senate Education Committee

   ▪ Equitable Access to DASNY Financing for Public Libraries
     • S.5303 Ritchie / No Same As
Currently in Senate Corporations, Authorities & Commissions Committee

- Taxpayer Access to Publicly-Funded Research
  - Working towards introduction in both houses

c. **NYLA-monitored Legislation**
   - Relates to Registering as an Organ Donor on SUNY, CUNY, and Library Card Applications
     - S.5283-C Jacobs / No Same As
       - Currently in Assembly Higher Education Committee
     - A.7580 Kearns / No Same As
       - Currently in Assembly Higher Education Committee
   - Prohibits Smoking Within 100 feet of the Entrances or Exits of Any Public Library
     - S.169 Rivera / A.330 Dinowitz
       - Currently in Senate Health Committee & Assembly Codes Committee
   - Relates to Studying the Economic Impacts of Public Libraries and Public Library Systems
     - S.3010 Ritchie / A.5810-A Quart
       - Currently in Senate Education Committee & Assembly Ways & Means Committee
   - Study on Public Libraries and Library Systems Access to Capital Funding
     - A.7630 Quart / No Same As
       - Currently in Assembly Libraries Committee
   - Establishes Centralized System to Coordinate Procurement of Books, Nonprint Materials, and Ancillary Services
     - A.7265 Abinanti / No Same As
       - Currently in Assembly Governmental Relations Committee

**Consulting & Development Services**

2. **Property Tax Cap Inflation and Allowable Levy Growth Factors** for 2018 are predicted to come out in mid-July.
   a. For new directors:
      i. Property Tax Cap Introductory webinar is available through MHLS:
         https://www.youtube.com/watch?v=-hJ2GjiZ2hA&feature=youtu.be
      ii. Contact me for a copy of answers to Frequently Asked Questions
   b. **Sample Override Resolution Language (NYLA):**

3. **Charter Amendments**
   a. **Charter vs. Bylaws: “What Trumps What” article attached to this report.** This article outlines the discussion from last month to guide you to where answers about your library can be found and the difference between your charter and your bylaws.
   b. **Reminder:** If you discover you need a charter amendment please start this process by emailing me.

4. **Trustee Education**
   a. **One State, One Book Program** from the Library Trustee Association of New York State (LTA) This Summer: LTA is planning a “community read” program for trustees this summer that will focus on the
Handbook for Library Trustees in New York State. Suggested readings coupled with online Q&A events are being planned. Stay tuned for more info.

b. **Statewide organizations endorse Helping All Trustees Succeed Curriculum (HATS):** The Library Trustee Association of New York State, the New York Library Association and the Public Library System Directors Organization have all endorsed the HATS curriculum for trustee education in New York State, read the full press release here: [http://bit.ly/2se0Dt1](http://bit.ly/2se0Dt1)

   i. This is the curriculum MHLS will be unveiling Fall 2017, starting with Orientation for New (& Newer) Trustees and Financial & Fiduciary Responsibilities, an intermediary level course.

**Construction**

5. **State Aid for Public Library Construction Program**
   a. The following libraries have indicated an intent to apply this year through the 2017 MHLS Action Memo:

      Amenia Free Library  
      Brewster Public Library  
      Catskill Public Library  
      Claverack Free Library  
      D.R. Evarts Library (Athens)  
      Desmond/Fish Library  
      Highland Public Library  
      Hudson Area Association Library  
      Julia L. Butterfield Memorial Library  
      Kinderhook Memorial Library  
      Kingston Area Library  
      Marlboro Free Library  
      Olive Free Library Association  
      Pine Plains Free Library  
      Red Hook Public Library  
      Reed Memorial Library  
      Sarah Hull Hallock Free Library  
      Stanford Free Library  
      Stone Ridge Library  
      Town of Ulster Public Library

   b. **Technical Assistance workshops have been scheduled and registration is open to all on the list above in item a.** These workshops will be held at MHLS using laptops so that each applicant can get a head start and one-on-one help with their application:

      i. Monday, June 19th | 1:30-3:30pm
      ii. Tuesday, June 20th | 10:00am-12:00pm
      iii. Monday, July 17th | 1:30-3:30pm
      iv. Tuesday, July 18th | 10:00am-12:00pm

   c. **Please note:** communication about application procedures from this point forward in the grant cycle are sent directly to those on the list under item a.

   d. **For general program information related to the State Aid for Public Library Construction, MHLS Funding Priorities and an overview of the timeline of the grant please view the recorded webinar,**
“Introduction to the State Aid for Public Library Construction Grant Program,” found here: 
http://midhudson.org/nysconstructiongrant/

e. **Application deadline:** Friday, August 4th, 2017

**Professional Development & Training**

6. **Save the Date! Monday, December 11th:** Full day course on budgeting and financial management, *the #1 requested topic by member library directors!* This course is taught by NYLA Leadership & Management Academy instructors Tom Lawrence of the Poughkeepsie Public Library District and Lauren Moore, Executive Director of the Pioneer Library System. This course highlights fundamental skills required for effective budgeting and financial management. The curriculum will include: budgeting basics; interpreting monthly financial statements; developing a budget; community based planning; budget modifications; audits; budge votes; tax cap issues; and capital finance.

7. **Upcoming Workshops.** For more information: http://calendar.midhudson.org
   a. Construction Grant Application Technical Assistance Workshops:
      i. Monday, June 19th | 1:30-3:30pm
      ii. Tuesday, June 20th | 10:00am-12:00pm
      iii. Monday, July 17th | 1:30-3:30pm
      iv. Tuesday, July 18th | 10:00am-12:00pm
   b. Leadership Circle with Evelyn Neale – Two-part series on Change Management
      i. Part 2 – October 3: Managing Unknown Change
   c. Roundtable for New Directors, September 6 after the DA meeting
   d. Friends Support Group: Fundraising Idea Exchange, October 5th, 5:30-7:30pm
   e. Budgeting & Financial Management, December 11 (full day course)

**Thomas O’Connell, Automation Coordinator**

**Technology Operations Overview**

1. **Ticket System for All Requests, and KnowledgeBase for Sierra Guides and Reports**
   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 Gerry Formby and myself. Unlike our individual emails, multiple people are tracking whether or not tickets are resolved in timely fashion.
   b. Questions regarding orders, brief records, and other cataloguing issues should be sent to cataloging@midhudson.org.
   c. In an effort to keep our Sierra database as current (and secure) as possible, please be sure to contact us, techsupport@midhudson.org, when you have changes in staffing. If you have new staff who need a login, someone who has taken on new responsibilities and needs additional permissions, or a staff member who is no longer working at the library, we are happy to update your logins to make sure they remain accurate.

**Integrated Library System & Cataloging**
2. Sierra Questions Webinars
   a. A chance to plan ahead - I have scheduled the next TWO Lunchtime webinars, for June and July. June’s Lunchtime Webinar will be a discussion about Patron Data Entry and an explanation of the patron fields we use in Sierra. July’s session also concerns data entry and fields, this time for Item Data Entry. Both sessions will take place via GotoMeeting sessions and last about 45 minutes. There is a 15 person attendance limit and pre-registration is required through the MHLS calendar at http:/mid-hudson.evenced.info/signup/calendar. Registration closed
   b. If you have ideas about topics you would like to see covered in potential future sessions, please contact me at toconnell@midhudson.org or call me at (845) 471-6060, ext. 221. These sessions are open to all member library staff members!

3. Volume Data in Item Records
   a. Speaking of Item Data… Lately we have seen some issues arise due to inclusion of Volume data in Item Records. When staff are adding a message to an Item Record, the option to add volume information is very close to the message option. This proximity means that it is easy to inadvertently add volume information when intending to add a message. Besides the fact that the “message” will not appear as intended, if a patron is requesting any item attached to the parent bibliographic record, they are asked to select a volume. This leads to confusion and delays when trying to satisfy the request, please be cautious when adding messages.

4. Sierra Upgrade
   a. As you are well aware, the Sierra 3.1 upgrade we had scheduled for Monday, May 29th, was delayed by Innovative Interfaces (III). A new date for the upgrade has yet to be determined as Innovative continues to test the stability of Sierra 3.1. Once III has completed testing and releases the software version, we will provide a new date for the upgrade. While you may be concerned about the need for Sierra to comply with security changes relating to e-commerce, we are still well within the window we need to complete the upgrade before the June 30th deadline, and III is very aware of the urgency to complete all upgrades to keep libraries running smoothly.
   b. One thing to be aware of, Sierra version 3.1 moves from Java 6 to Java 8. This is a good thing, but there is a slight chance that you may need to reinstall Sierra after the upgrade. I recommend that you have the Sierra installation instructions handy just in case – they are attached to this report.
# MHLS Committee Membership 2017

<table>
<thead>
<tr>
<th>ADVISORY COMMITTEES</th>
<th>Columbia</th>
<th>Dutchess</th>
<th>Greene</th>
<th>Putnam</th>
<th>Ulster</th>
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<tbody>
<tr>
<td>Central Library / Collection Development</td>
<td>Emily Chameides ‘17</td>
<td>Carol Fortier ‘17 Daniela Pulice ‘19</td>
<td>Maureen Garcia ‘19</td>
<td>Michele Capozzella ‘19</td>
<td>Margie Menard ‘17 Tracy Priest ‘19</td>
</tr>
<tr>
<td>Chairs of County Directors Groups</td>
<td>Julie DeLisle</td>
<td>Stephanie Harrison</td>
<td>Sue Ray</td>
<td>Michele Capozzella</td>
<td>Margie Menard</td>
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Out of System ILL’s

ILL Dummy Cards allow for the tracking of out of system ILL materials through Sierra. This provides an easy-to-find and organized method of keeping all important ILL information together, gives an indication in the patron’s record that they have an ILL item checked out, and is a great asset for your annual report statistical records.

Item Dummy Cards – Receiving ILL

This is used when an item comes to your library, from out of the MHLS system, for your patron. When receiving ILL items, they should be checked out to the patron using an ILL Dummy Card. At checkout, the Item record should be updated with a note containing information such as the owning library, title and author, due date, etc...

Create ILL Dummy Cards by attaching them to one of the following Bibliographic Records:

- ILL Book - b1028302x
- ILL AV - b1028154x

Patron Dummy Cards – Sending ILL

This is used when you are sending items outside of the MHLS system. ILL items should be checked out to either an institutional record (if there is one in Sierra) or a patron dummy card (if there is no institutional record). If using a patron dummy card, at checkout the record should be updated with a note containing all important information on the requesting patron/institution.

Institutional Records can be found by doing a name search (n) within checkout. Examples include:

- Haverstraw Public Library – 22380001001601
- Dutchess County BOCES – 22380001185172
Check Your Sources

Rebekkah Smith Aldrich, Coordinator for Library Sustainability for the Mid-Hudson Library System, Co-Author of the Handbook for Library Trustees in New York State and Mentor for the Helping All Trustees Succeed (HATS) LEAD Team

While most public library trustees are not lawyers, trustees are expected to follow the law of the land, whether that “land” be federal, state or in your very own library. When seeking answers and guidance it is important to understand which legal instruments have precedence over others.

A common example of confusion in this area is where you would find the answer to how many trustees serve on your board. You may think it is your bylaws, but actually it is your library’s charter, issued by the New York State Board of Regents. If the two don’t match you could be in some legal hot water if someone challenges a decision made by the board. Another example is library policy, it may not violate state or federal law.

Here are simple explanations of the various sources of law and guidance you may be using to make governance and policy decisions help you get a better understanding of “what trumps what”:

- **Law:** a law is specific, written legislation that is made by elected officials and administered through the courts. For example, the basic powers and duties of trustees can be found in Education Law §226. This law provides the basic rules of conduct for a library board.

- **Regulation:** Laws are carried out through the development and enforcement of regulations. Regulations are usually set by the arm of government tasked with oversight of that area of law. If a library is in violation of a regulation there is authorization of the government oversight agency to pursue correction, possibly punitive correction. For example, the Education Commissioner is authorized to set regulations that impact libraries in New York State, like the Minimum Standards for public libraries. Minimum standards are tied to a library’s ability to receive tax dollars so if a library does not comply with the standards there is theoretically very big consequence.

- **Opinions:** Opinions should not be confused with yours, or your fellow trustees’ opinions. Pertinent opinions are issued by agencies such as the Commissioner of Education or the Office of the State Comptroller to provide an analysis of how a particular law or regulation applies in a very specific situation.

(continued on page 3)
- Charter: This document, issued by the New York State Board of Regents, gives the library its corporate existence. The charter defines the library's service area, number of trustees and other fundamental facts about the library.
  - Provisional charter: newly established libraries are given a provisional charter that is valid for five years. There are usually stipulations that a library develop its organization in a specific way to demonstrate it is a viable library within those five years.
  - Absolute charter: At the expiration of the provisional charter, the charter may either be made absolute or extended for an additional five years.

- Bylaws: All libraries must have written, board approved bylaws which define how the library will be governed. This document may not conflict with the charter. The bylaws will outline how a board functions. Sample bylaws are available in the Trustee Handbook.

- Policies: A policy is a guiding principle used to set direction in the library. Written, board approved policies are a minimum standard for public libraries in New York State. They are the “micro local laws” of your library but may not exist in conflict with laws, regulations or the library’s charter.

- Procedures: A procedure is an outline of the steps that should be taken by staff or trustees to accomplish something stipulated within policy.

2. A page will pop up with instructions on how to install the Sierra Desktop App for all different types of Operating Systems. You can peruse the instructions by scrolling up and down the window.

3. Click on “Download...” next to your Platform. So if you are installing Sierra onto a Windows computer click on the “Download” link next to the Windows icon/logo.

4. Click “Save” when your computer asks you what to do about the download.

5. Launch the installation process by running the “install.exe” (this may pop up automatically, be in your browser’s downloads, or an icon on your Desktop).

6. Once the Installation software has been downloaded to your computer and you open/run it, a pop-up window will walk you through the Sierra installation process. Click through the questions choosing where to install (default=desktop) and where to put shortcuts (default on...
7. If prompted for the server enter midhudsonlibraries.org.

8. The program should install. Click “Done” when prompted.

9. Now you have Sierra installed on your computer. If you chose to install it onto your Desktop, the icon looks like:

10. To open the Sierra Desktop App locate Sierra Desktop App’s icon (wherever you saved it), sign in, and get to work!