

## MHLS REPORT TO MEMBER LIBRARY DIRECTORS - NOVEMBER 2017

---

The format of this report is based on the MHLS service priorities as determined by MHLS stakeholders.

### 1 DELIVERY SERVICES

---

#### 1.1 NO REPORT FOR THIS MEETING

- a. If you have questions about this service area contact Tom Finnigan.

### 2 INTEGRATED LIBRARY SYSTEM & CATALOGING SERVICES (LAURIE)

---

#### 2.1 ENCORE RESEARCH STARTERS GOES LIVE ON NOVEMBER 15TH

- a. A new feature, approved for inclusion in the September meeting of the Central Library / Collection Development Committee will go live on 11/15/17. This feature will provide topical research introductions on many subjects and search terms. For more information, please view <https://vimeo.com/88200369>. An MHLS e-mail "Notice" was sent with the subject "Sierra: Encore Research Starters" on October 18<sup>th</sup>.

#### 2.2 SUPPRESSED ITEMS

- a. Items with a status of "Lost & Paid", "Discard" and "Claims Returned" for more than 3 months were updated on Monday October 16th to reflect "suppressed" in the annual report field, according to the approved process by the DA in June of 2015 meeting.

#### 2.3 SIERRA 3.3

- a. Innovative Announces Sierra 3.3 is now in General Release
- b. New Features:
  - WebPAC warns patrons 20 seconds before timing out or closing popups, in compliance with W3C Web Accessibility Guidelines for Timeouts.
  - Permission 191 (Restrict user to status 1 order creation) no longer overrides 132 (Create order records)
  - Continued performance improvements for Create Lists
  - Continued performance improvements for Delete Records

#### 2.4 ONLINE PATRON REGISTRATION FORM & ACCESS

- a. Online Patron registration, a feature of Sierra, is available to any member library who wishes to implement it. There is no fee and the forms and template can be customized for you.

Messaging to patrons can include custom text and branding. Open a ticket with [techsupport@midhudson.org](mailto:techsupport@midhudson.org) for information or to get started.

- b. The record form includes required patron info (name, address, email, phone), and the custom template includes default fixed and variable field values set by the library. This can also include a custom expiration date, but that is a local library decision.
- c. The process creates a Sierra patron record that includes a seven digit number that is entered in the barcode field, and immediately acts as a barcode for any product that authenticates using the Sierra API. At this point this includes the following products:  
OverDrive, Job Now, Mango Languages, Tumblebooks, Chiltons, NovelNY (Britannica, Business : Essentials, Opposing Viewpoints and Contexts, Research in Context, Health Reference Center Academic, Academic Onefile, General OneFile, InfoTrac Newstand, Kids InfoBits), SAM, EnvisionWare.

The following are currently not included, but we are actively working with the vendors to include them: RBDigital & Consumer Reports.

## 2.5 UPDATE WORKFLOW CONSULTING

- a. Please see [October Report](#) for the original announcement of this service.
- b. The response has been very positive and we are scheduling through November now.

## 2.6 LUNCH TIME WEBINARS WITH THOMAS O'CONNELL

- a. November 17- [Sierra Circulation 101](#) (click for more info and to sign up)
- b. November 28<sup>th</sup> -[Web Management Reports](#) (click for more info and to sign up)

# 3 COORDINATED IT SERVICES (LAURIE)

---

## 3.1 TELEFORMS

- a. An action memo has been sent to member libraries to offer the Teleforms service to libraries who aren't currently using the product. Teleforms, an automated telephone service, is used to contact patrons about holds and overdue items. The cost for the telephone lines that support the service and maintenance is shared by the libraries who choose to participate.

## 3.2 AEROHIVE ACCESS POINT ROUTERS

- a. The 2017 implementation of the Aerohive AP devices is nearly complete. We still have three that we would like to place with a library. If you are one of the libraries who delayed installation to or were included in the 2018 recipient list, please contact Laurie or Gerry if you would like to receive a device earlier.

## 4 PROFESSIONAL DEVELOPMENT & CONTINUING EDUCATION

---

### 4.1 TRUSTEE EDUCATION SERIES (REBEKKAH)

- a. This fall marked the launch of a revamped Trustee Education Series. We offered three instances of the introductory “Trustee Essentials” workshop and two of the intermediary level “Financial & Fiduciary Responsibilities” workshop.
- b. 79 member libraries trustees and directors attended
- c. Evaluation results:
  - o 100% of those who responded to the evaluation indicated that the workshop they attended was a good use of their time.
  - o 100% of those who responded to the evaluation indicated that they now feel more confident that they understand their role at the library thanks to the workshop.
  - o Comments:
    - *“All trustees and directors should be required to attend this workshop.”*
    - *“Excellent, as have been all the MHLS workshops. Wish I had taken this years ago before I first took up the position of library treasurer. But never too late.”*
- d. In the Spring of 2018 we will again offer multiple instances of the Trustee Essentials workshops.

### 4.2 FINANCIAL COURSE FOR DIRECTORS (REBEKKAH)

- a. There are still seats left for the free, full-day course on Budget & Financial Management which will be held on Monday, December 11<sup>th</sup> from 10:00am-4:30pm in the MHLS Auditorium.
- b. Topics to be covered include: budgeting basics, interpreting monthly financial statements, developing a budget, community-based planned, budget modifications, audits, budget votes, tax cap issues and capital finance.
- c. Complimentary lunch will be provided.
- d. Please register online at <http://calendar.midhudson.org>

### 4.3 LIU PUBLIC LIBRARY ADMINISTRATORS CERTIFICATE PROGRAM – THIS SPRING AT RCLS (MERRIBETH)

- a. Many MHLS library directors earned post-masters certificates through this program in the past. If you have not yet had the chance to attend, note that the [program](#) is being held in Middletown this spring.
- b. The first of 5 courses required for the certificate will be held over 4 days (Mar 15, April 19, May 24 & June 14, 2018) from 9am to 5pm. The cost of this first course is \$1350.
- c. If interested contact Grace Riario [griario@rcls.org](mailto:griario@rcls.org) **no later than Nov 17, 2017.**

## 5 CONSULTING & DEVELOPMENT (REBEKKAH)

---

### 5.1 2018 COMMUNITY ENGAGEMENT LABORATORY PROJECT

- a. As outlined in the Phase II Action Plan, in 2018 we will be launching a “Laboratory Project” using the model of the Increasing Circulation Incubator Project from 2015. This will involve a cohort of libraries working together to explore and test best practices for affecting positive change in their efforts to engage with their community.
- b. The 2018 focus will be: Increasing Active Cardholders
- c. Data related to your library on this topic is now available at <https://midhudson.org/mhls-laboratory-projects/> in two formats: an Excel Spreadsheet and a PDF version. The chart shows:
  - o What percentage of your chartered service population are library card holders
  - o What percentage of library card holders have been “active” in the past 12 months.
    - “Active” is defined as when one of the following circulation activities was performed for or by the patron, as recorded in the Circ Active field of the patron record in Sierra: checking out an item, checking in an item, renewing an item, placing a hold, verifying in the WebPAC, viewing patron information with Patron API (e.g. for OverDrive; SAM & Envisionware), viewing patron information via the My Account Web Service, updating the patron record via the Patron Update Web Service, paying fines via the Fines Payment Web Service.
- d. In 2018 we will be seeking a select number of member library directors that would like to participate in this Lab Project to work on increasing the percentage of their library cardholders that are active users.

### 5.2 SUSTAINABLE LIBRARY CERTIFICATION PROGRAM

- a. The New York Library Association’s Sustainable Library Certification Program is a benchmarking program that helps a library to improve their “triple bottom line” as environmental stewards, economically feasible institutions and as community leaders that place great stock in a socially equitable community.
- b. The custom process is modeled on what has proven successful in other industries - from the business world (e.g. B Corporation certification), to the world of construction (e.g. Leadership in Energy & Environmental Design certification), to academia (e.g. The Association for the Advancement of Sustainability in Higher Education Sustainability Tracking, Assessment & Rating System). This tool fills the void in the library field.
- c. This program is open to all public libraries in New York. **There is a discounted rate available through the end of 2017 for early adopters.** To learn more please visit: [www.nyla.org/sustainability](http://www.nyla.org/sustainability) You may also want to sign up for an **introductory webinar** on Friday, November 17<sup>th</sup> from 11:00am-noon: <https://goo.gl/forms/WLod2L7DyC4CnIsI3>
- d. The **Highland Public Library** is the first MHLS member library to join the program!

### 5.3 COMMUNITY CONVERSATIONS INTRODUCTION

- a. The latest installment of the MHLS Engage! Webinar Series features the recent experience of the Mahopac Library in using the American Library Association's Libraries Transforming Communities Turning Outward resource: Community Conversations: <https://youtu.be/UsdfuEkqfeo>
- b. Community Conversations are the new "focus group" in strategic planning for the future of your library and community. They are designed to put the community at the center of your planning process to respect "public knowledge." Public knowledge comes from engaging with people around their aspirations, their concerns, how they see their community. This can help a library root your work and decisions in what matters to people; identifies key issues and their connections in language that people use; uncover a sense of common purpose; enable you to set realistic goals; inform your choices as a library so your work is more relevant and has greater impact.
- c. If you are inspired to learn more after hearing Mahopac's story, visit the Turning Outwards Resources page to access the [Community Conversations Workbook](http://bit.ly/2ziEHQ9) and related webinars: <http://bit.ly/2ziEHQ9>
- d. As per the Phase II Action Plan, in 2018 we will be seeking member libraries ready to do this work in their communities to participate in a guided cohort.

## 6 COOPERATIVE COLLECTION DEVELOPMENT & DIGITAL COLLECTION ACCESS

---

### 6.1 BOOK CLUB IN A BAG TIMELINE (MERRIBETH)

- a. As noted in the Action Plan Phase III of the MHLS Plan of Service, MHLS is implementing the transition of the Book Club in a Bag collection to the [member libraries that own the materials](#). Here is a timeline for that process:
  - 1) November 2017: MHLS turns off the ability to make reservations after January 1, 2018. MHLS posts on the Book Club in a Bag webpage, and in the reservation software, that the program is ending January 1.
  - 2) December 2017: MHLS notifies libraries of existing reservations that will be canceled in January. Any patron notification of holds being cancelled is the responsibility of the local library.
  - 3) January 2018: MHLS turns off ability for Kit Keeper to accept new reservations, which also cancels existing reservations.
  - 4) January – February 2018: MHLS returns kits to owning library unless library prefers for MHLS to give kit(s) to a correctional facility library. MHLS updates bib records.

## 6.2 COLLECTION/CIRCULATION STATISTICS

- a. [Circulation Trends for 2010-2016 by MHLS Member Library - Revised](#)
- b. Summary of System Trends

Percent Difference 2013-14	Percent Difference 2014-15	Percent Difference 2015-16	Cumulative Percent Difference 2010-16
-9.89	-2.9%	-2.7%	-19.1%

## 6.3 OVERDRIVE 'GET A LIBRARY CARD' PILOT (MERRIBETH)

- a. OverDrive is in the early pilot stage on a 'Get a Library Card' (GCL) project to explore how they can make it easy and fast for readers without a library card to get one to check out items in the OverDrive collection.
- b. They are using a form of geolocation authentication that is based on the readers mobile phone number. (Geolocation authentication is a method to allow or disallow a user based the identification or estimation of the real-world geographic location of an object, such as a mobile phone, or Internet-connected computer terminal.)
- c. The OverDrive GLC development teams still have to work out the intricacies of mapping large groups, so at this time they are not yet ready to offer the feature to consortia partners like MHLS.
- d. As they stand now, it would be the decision of the consortia to participate or not in this authentication method, and it would apply to all member libraries. They are unable to break out libraries not interested in participating. Note also that these GCL cards would work only in the OverDrive platform and are separate from Sierra patron records.
- e. This is on the agenda for the 11/16 meeting of the MHLS Central Library / Collection Development Advisory Committee.

# 7 AWARENESS & ADVOCACY SERVICES

---

## 7.1 PILOT PROJECT – THEMED MESSAGES REGARDING CONSUMER REPORTS (TOM S)

- a. See [October Report](#) for information on E-Message #1, Facebook Ad #1, Consumer Reports Usage May-July
- b. Consumer Reports Facebook Ad #2 - Release date: October 1
  - o OUTPUT: Universe 460,000, 27,502 unique people served the ad, Impressions 58,939 serves/exposures; 104 Comments, Shares, Reaction; 597 link click; \$300 ad budget;
  - o [Consumer Report Use Statistics \(collected by library patron barcode prefix\)](#)
- c. Future Timeline
  - o Consumer Reports E-Message #2 (Winter) - Release date: November 2
  - o Assess with the Central Library/Collection Development Committee any changes in patron use of Consumer Reports
  - o Based on assessment of the Consumer Reports Pilot Project, determine with the Central Library/Collection Development Committee & Directors Association if and how to proceed with additional campaigns for e-Resources targeting registered library patrons

## 7.2 ADVOCACY DAY 2018

- a. NYLA's lobbyists report this will be an extremely tough budget year so get ready to advocate!
- b. Save the Date for NYLA Advocacy Day in Albany, NY: **Wednesday, February 28, 2018**
- c. We will launch another round of the Real People. Real Dollars. campaign in January 2018
- d. Letters to Friends Groups soliciting donations to underwrite Advocacy Day activities, like the shared bus to Albany will, as requested, be issued in December.

## 8 INTERLIBRARY LOAN SERVICES

---

### 8.1 NO REPORT FOR THIS MEETING

- a. If you have questions about this service area contact Tara Stohr.

## 9 CONSTRUCTION PROGRAM SERVICES (REBEKKAH)

---

### 9.1 ACTION MEMO FINDINGS TO INCENTIVES COMMITTEE

- a. Thank you to all who took the time to respond to MHLS Action Memo #17-05 which requested input from member library directors on the MHLS Board's priorities for funding projects through the State Aid for Library Construction Program.
- b. Results of the survey will be provided to the Incentives Committee of the MHLS Board. This is the committee that oversees the administration of the program at MHLS and makes recommendations to the board regarding the funding priorities and award amounts.

## 10 COMMUNICATIONS AMONG MEMBER LIBRARIES

---

### 10.1 NO REPORT FOR THIS MEETING

## 11 SPECIAL POPULATIONS (MERRIBETH)

---

### 11.1 MHLS EARLY LITERACY COHORT II PROJECT – APPLICATIONS AVAILABLE IN DECEMBER

- a. I want to make sure it is still on your radar (as mentioned in the [July report](#)) - in early 2018, a second **MHLS Early Literacy Cohort Project will begin with a new group of libraries**. This is a great opportunity if your library would like to really work on building its capacity, as part of your library's long range/strategic planning, to provide early literacy services in your community based on best practices. Additional information and applications will be available in December 2017. Limited to 12 libraries, the Cohort will run from January 2018 – June 2019.

## 11.2 EARLY LITERACY SUPPORT THROUGH DAYBYDAYNY & DAYBYDAYNY IN SPANISH

- a. In addition to the online virtual family literacy calendar available at <http://DayByDayNY.org>, there is now a Spanish version available at <http://www.daybydaynysp.org>. In each version, the content changes each day, giving families with young children, caregivers, library staff, and teachers numerous daily learning activities and a fun story to read together. Both versions encourage a love of books, learning, and libraries that will last a lifetime and are designed to help parents and caregivers increase a young child's cognitive skills while having fun together at the same time.

## 11.3 MATERIALS FOR MHLS CORRECTIONAL FACILITY LIBRARIES

- a. If you are weeding keep in mind that donations of paperbacks, magazines (back years are fine) and books-on-tape are of great interest to the correctional facility libraries in the MHLS region. Note that all 6 of the facilities **primarily serve men**. In addition they are looking for a 2009 (or newer) encyclopedia set, as well as 2018 calendars.
- b. If you bring them to a MHLS meeting or workshop (please do not use the delivery for donations) we will be pleased to pass them on. Thank you in advance for giving your materials a second life and for helping to contribute to the literacy, information seeking and recreational reading of many people.

# 12 COOPERATIVE EFFORTS WITH OTHER LIBRARY SYSTEMS (REBEKKAH)

---

## 12.1 TRUSTEE EDUCATION REGULATION TASK FORCE

- a. MHLS Coordinator for Library Sustainability, Rebekkah Smith Aldrich, has been named to a Public Library Systems Directors Organization (PULISDO) task force that is working with the NYS Division of Library Development (DLD) to develop language for a new Education Commissioner's regulation that would be related to mandatory education for Public Library Trustees.

# 13 ADMINISTRATIVE

---

## 13.1 MHLS PLAN OF SERVICE - ACTION PLANNING (TOM S)

- a. See [October Report](#) for information on Phase I: Delivery; Integrated Library System; Cataloging; Coordinated Services (IT); Phase II: Professional Development/Training; Consulting/Development Services; Awareness/Advocacy; Construction; Communication Among Member Libraries; Phase III: Cooperative Collection Development; Interlibrary Loan; Digital Collection Access; Cooperation Efforts With Other Library Systems
- b. [Discussion Draft - Action Plan Phase IV: Special Populations - Adult Literacy; Coordinated Outreach; Correctional Facilities; Youth Services; Early Literacy](#)
  - 1) DA Comments and/or Questions Regarding Phase IV Discussion Draft?



## 13.2 MHLS DRAFT 2018 BUDGET

- a. Operating Receipts
  - 1) 2018 Budget - 0% increase in 2017
  - 2) 2017 Budget - 4.3% increase in 2016
  - 3) 2016 Budget - 6% increase in 2015
- b. Operating Expenses
  - 1) Implementation of MHLS Plan of Service & 18 Service Areas
  - 2) Staff Salaries & Benefits based on negotiations with Civil Service Employees Association, Inc., Local 1000, AFSCME, AFL-CIO
  - 3) Member Special Projects: Aerohive Wireless Routers for Member Library/Year 3; Library Elf
- c. Operating Fund Balances
  - 1) Operating Reserve Fund - 100% Funded in 2018 & 100% Funded in 2017 - MHLS Operating Reserve Fund Policy - The Reserve Fund goal will be to achieve and maintain no greater than eight (8) months (66%) of the Costs of Funding Services and Operations as defined in Section IV.
  - 2) Operating Contingency Fund – 39% Funded in 2018 & 62% Funding in Funded in 2017 - The Contingency Fund goal will be to achieve and annually maintain in reserve ten (10%) of Program Funding and Operating Costs as defined in Section III.