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MHLS Report to Member Library Directors - June 2018

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

1 Delivery Services (Tom S)

1.1 ORIENTATION FOR NEW DIRECTORS

- a. Orientation to Delivery Services Includes:
 - o Delivery Schedule
 - Delivery Driver Information Including Photo
 - Review of Current Building Entry, Alarm, and Keys
 - o Delivery Operations Communications to Member Libraries
 - Member Library Responsibilities

2 INTEGRATED LIBRARY SYSTEM & CATALOGING SERVICES (LAURIE)

2.1 ILS/ILP REVIEW - ACTION PLAN 2017-21 - ILS/ILP SERVICES

- a. The MHLS Action plan includes activities to "Identify and study the latest developments in library services platforms (LSPs) components that make up the library technology 'ecosystem', recognizing multiple source components may be desired in place of or in addition to a closed and monolithic suite of ILS services from a single vendor." The goal is to have enough awareness of the market place to be confident that we are on the platform that best meets our needs and be able to document that evaluation in the form of a white paper document this year. For months, the Tech Ops team at MHLS has been actively engaging with vendors to review systems for compatibility with our practices and feature needs. This has included a review of TLC's CarlX, SirsiDynix's Symphony/Blue Cloud, Autographic's Verso, and III's Sierra & Polaris systems, expected to converge in a cloud only offering in the future. We have pulled together a team of member library system experts, who have agreed to take a deeper dive in reviewing features and functionality of integrated library systems that can replace the Sierra system. The team consists of 2 Directors (Annalee Giraldo and Daniela Pulice) and member library staff who have known expertise in the areas of circulation cataloging and reports (Jesse Chance, Beverley Santero, Corrinne Slaughter, Sarah Ottaviano). To date the team has reviewed Sirsi's Symphony Blue Cloud. Follow up workflow analysis with SirsiDynix and feature discussions are being scheduled for June/July.
- b. To learn more about the current ILS/ILP market place, check out the 2018 report from Marshall Breeding in American Libraries May 2018 issue: https://americanlibrariesmagazine.org/2018/05/01/library-systems-report-2018/

2.2 SIERRA 4.0 IS IN RELEASE NOW

- a. This is a significant release with many changes to core tables used in circulation transactions.
 We will be vetting this release longer than usual to insure that it is stable and consortia friendly.
 We are planning the upgrade for the end of July.
 Includes:
 - Auto renewal a feature of courtesy notices respects loan rules
 - System limit expansion (woohoo!) more material types (500), ptypes & itypes (2000) and item status (200)
 - Streamlined notice workflows
 - Faster facet loading
 - o Increased password security

2.3 BAKER & TAYLOR'S TITLE SOURCE 360

- a. The action memo for subscribing to Baker & Taylor's TitleSource (TS) 360 concluded on April 30th. With new lower pricing in place there was an increase in participation. We have turned over the information to B&T who will be in setting up the user accounts for the new libraries. If you are new to TS360 you may be contacted for more information or to update your account.
- b. We will be modifying our workflows to incorporate Quick Click ordering. Quick Click ordering, when used as intended, loads the records into the system as part of the ordering process. This means records are created when you order your cart and do not require MHLS catalog staff to "load" your cart. We have a ticket open with iii to reconfigure our installation. Once this is complete, we, with help from B&T, will be offering training via a webinar. The webinar will be recorded. We will announce the date as soon as possible.

2.4 LOAN RULES

- a. There has been a good deal of recent activity with Loan rules. We have County Wide Policies in Green County going into place and the discussion is taking place in other counties too. Loan Rules are quite particular and have many facets. MHLS Technology Operations staff can assist you in understanding the rules you have in place and help you to incorporate changes that meet your needs and keep your transactions humming along system wide.
- b. Cleaning up. MHLS staff will begin to clean up the loan rules that are in place. To do this will require some consolidation and reconfiguration. We will also be looking for gaps in the tables that have occurred where rules applied for one location, that were not carried forward to all locations. With the expansion of codes coming in Sierra release 4.0, the tables have potential to expand. It would serve us well to organize before the expansion.

2.5 Annual Record Suppression of Items with Lost & Paid, discard, or claims returned

a. The cataloguing department will be suppressing all item records that have been at the status of 'Lost & Paid' 'Discard,' or 'Claims Returned' for more than three months on June 29th. If you want to run any report for data based on the Update field, you will want to run your reports before we update these records.

This action was decided at the 6/2/2015 DA meeting —Items with Status Lost & paid, Discard and claims retuned be suppressed in the catalog after 3 months and that items with a status of missing, missing in transit, on search, repair and billed be suppressed after 3 years.

3 COORDINATED IT SERVICES (LAURIE)

3.1 Aerohive Routers – 2018 implementations/follow up

- a. We have received all the units and are currently setting up appointments with the member libraries who will be receiving units this year. We have about half of the units shipped and should be completing the implementations in the first week of June.
- b. As this is the final year of the purchasing plan, we will be reviewing and evaluating the implementations at the end of the year. If you need support on your current implementation or have not yet begun using a unit you have received, please, open a ticket with techsupport@midhudson.org.

4 Professional Development & Continuing Education

4.1 Project Outcome Online Meetings (Rebekkah)

- a. For those who attended the April 25th in person Project Outcome there is an online follow up meeting on Friday, June 29th from 11am-12:30pm. This meeting is a great opportunity to ask the Project Outcome trainer and your training group peers any questions that may have arisen since the in-person training or to help give you a little jump start if your efforts have stalled out. Registration info was sent to all participants on May 18th.
- b. A second follow up meeting will be held on September 24th.

4.2 Trustee Education Series Continues This Fall (Rebekkah)

- a. Essentials: Roles & Responsibilities
 - Friday, September 7 from 9:30am-12:30pm @MHLS Auditorium
 - Saturday, September 22 from 9:30am-12:30pm @Kingston Library
- b. Intermediate: Financial & Fiduciary Responsibilities
 - Tuesday, September 25 from 5:30-8:30am @MHLS Auditorium

c. NEW: Advanced: Strategic Thinking: Planning & Advocacy

- Saturday, October 6th from 9:30am-12:30pm
- Thursday, October 11th from 5:30-8:30pm @MHLS Auditorium

4.3 LEGAL TOPICS SURVEY (REBEKKAH)

a. All directors will receive a survey this summer asking them to rank a list of legal topics you would like more continuing education on to help shape the design of future workshops for directors.

4.4 Public Library Administrators Program (Merribeth)

- a. The 2016-2018 cohort of the Public Library Administration Program, offered through Long Island University and hosted at the Westchester Library System, was completed in May. This post-Master's Advanced Certificate program is designed to develop and enhance management skills and credentials of professional librarians working within the public library sector and to train the leaders of tomorrow
- b. We congratulate the new graduates from our region:
 - o Michele Capozella, Director, Mahopac Public Library
 - o Rita Covelli, Assistant Director, Mahopac Public Library
 - o Stephanie Harrison, Director, Millbrook Library
 - o Jen McCreery, Director, Desmond-Fish Library (Garrison)
- c. Due to the success of this program in our region another round will be offered starting in the Fall of 2018 and running through the Fall of 2010. This five-course, fifteen-credit graduate-level public library management training program is recognized by the New York State Education Department. The course will be offered in seven (7) half-day sessions, and classes will meet at the WLS headquarters.
 - o Principles of Public Library Organization and Management (LIS 700): Fall 2018
 - o Legal Issues in Public Library Administration (LIS 701): Spring 2019
 - o Human Resources Administration in the Public Library (LIS 702): Fall 2019
 - o Financial Management of Public Libraries (LIS 703): Spring 2020
 - Administration of Public Library Facilities and Technology (LIS 704): Fall 2020
- d. If you are interested in joining the program please contact Elise Burke at eburke@wlsmail.org

5 CONSULTING & DEVELOPMENT (REBEKKAH)

5.1 Turning Outwards Cohort

- a. Ten member libraries are currently fielding teams that are actively engaged in facilitating community conversations this summer:
 - o Julia L. Butterfield Memorial Library (Cold Spring)
 - Highland Public Library
 - Hudson Area Library
 - Kingston Library
 - LaGrange Library
 - New Lebanon Library
 - Putnam Valley Free Library
 - Starr Library (Rhinebeck)
 - Saugerties Public Library
 - Tivoli Free Library
- b. The teams are using a free workbook made available through the American Library Association's Libraries Transforming Community Project with support from MHLS Coordinator for Library Sustainability, Rebekkah Smith Aldrich & MHLS Sustainability Associate & Communications Specialist

- c. This fall the teams will meet up at MHLS to discuss what they've learned and work on theming the input gathered to help shape the design of future library services, programs and messaging.
- d. If this sounds useful to your library let Rebekkah know if you are interested in participating in the 2019 Turning Outwards Cohort: rsmith@midhudson.org

5.2 CHANGE MANAGEMENT MODEL PILOT

a. Michele Capozella, Director of the Mahopac Public Library, will be working with MHLS Coordinator for Library Sustainability, Rebekkah Smith Aldrich this summer to test out a "Change Management Model" Rebekkah has designed. This program is based on lean management principles using Six Sigma techniques and tools for process improvement. Michele and her leadership team will work with Rebekkah to identify processes in their library that are in need of change to improve staff and patron experience. "Rapid Improvement Teams" will be chartered among the staff of their library to intensively work on finding solutions and implementing improvements on a fast, iterative cycle. Stay tuned for more info!

5.3 2018 MHLS LABORATORY PROJECT: ACTIVATION & RETENTION OF CARDHOLDERS

- a. Five member libraries are participating in this year's Lab Project:
 - Julia L. Butterfield Memorial Library (Cold Spring)
 - East Fishkill Community Library
 - Hudson Area Library
 - Kinderhook Memorial Library
 - Pleasant Valley Free Library
- b. Participating directors had a recent meet up at the East Fishkill Community Library to discuss their progress on their action plans. Directors shared new "Welcome" messages being sent to new cardholders, a new rack card used to connect new patrons with services of the library, postcards to help patrons avoid card expiration and design elements of a "New Patron" area of a library web site.
- c. The libraries are focused on increasing the number of active cardholders (those cardholders who have used their library card in the past 12 months) and cardholder retention rates: ((CE-CN)/CS))X100
 - CE: number of cardholders at the end of a period of time
 - CN: number of new cardholders acquired during a period of time
 - CS: number of cardholders at start of period of time
- d. 2018 Lab Project Libraries will be sharing their findings during the 2018 MHLS PR Exchange at the September DA meeting.

5.4 Sustainable Thinking in Practice

- a. Did you know that sustainability was identified as a major national trend in the 2018 State of America's Libraries Report? Read all about it here: http://www.ala.org/news/state-americas-libraries-report-2018
- b. Member libraries participating in the NYLA Sustainable Library Certification Program are welcome to join a statewide, online meet up of libraries in the program on Friday, June 8th from

10:00-11:30am. Registration information was sent to the Certification Participants list or contact rsmith@midhudson.org

- c. Interested in learning more about the certification program?
 - a. It was recently featured in Library Journal!
 https://lj.libraryjournal.com/2018/05/buildings/lbd/certified-sustainable-library-design/#
 - b. NYLA Sustainable Library Certification Program: https://bit.ly/1QxU38K

5.5 ESSENTIAL DOCUMENTS INVENTORY

- a. It's that time again! This summer you will receive a custom report for your library which indicates the essential documents that are on file with MHLS. We are asking you to send us:
 - a. Anything that you've completed since the last time we requested these documents
 - b. Any updates you've made to items we may already have on file
- b. 2017 Essential Document Trends: Thanks to the response to this effort last year we have identified areas where libraries are doing great and areas, systemwide, in need of improvement:
 - a. Personnel policies are slowly but surely getting better! More libraries than ever have addressed sections such as recruitment and hiring, staff computer/internet use and customer service but we still see an alarming number of libraries (almost half) without a whistleblower policy. This policy is recommended for all libraries and is a key policy element for financial transparency.
 - b. External policies, those that are forward facing, guiding interactions with patrons saw big growth in three areas:
 - i. Adoption of the ALA Freedom to Read and Freedom to View Statements
 - ii. Vulnerable adults
 - iii. Programming
 - c. Almost all libraries now have a patron code of conduct, something that less than half of libraries had when we began this work!
 - d. Internal policies:
 - i. There has been an 800% increase in the number of libraries with **facility plans** in place since 2014 thanks to this program!
 - ii. There is a noticeable trend in creating **continuing education policy for trustees**; a growing number of library boards are mandating attendance at MHLS Trustee Essentials workshops.
 - iii. We can see a big spike in the number of libraries with key financial control policies such as those related to credits cards, online banking/wire transfers and travel/conference. However, there is still definitely room for improvement in the **financial control area** overall which is still a concern.
 - e. As always, policy samples and starter question are available on midhudson.org

6 COOPERATIVE COLLECTION DEVELOPMENT & DIGITAL COLLECTION ACCESS (MERRIBETH)

6.1 TOP OVERDRIVE HOLDS

a. As of 5/29/18 here are the top 10 OverDrive titles with the highest copy to holds ratio. If you have not already purchased an Advantage copy of this title, you may want to check to see how many of your patrons are in the holds queue for these.

Title	Author	Format	Total Holds	Number of Copies	Consortium Ratio*	Price
Less (Winner of the Pulitzer Prize): A Novel	Andrew Sean Greer	eBook	38	1	38	\$78.00
The 17th Suspect: Women's Murder Club Series, Book 17	James Patterson, Maxine Paetro	eBook	29	1	29	\$87.00
The High Tide Club: A Novel	Mary Kay Andrews	eBook	27	1	27	\$60.00
Prairie Fires: The American Dreams of Laura Ingalls Wilder	Caroline Fraser	eBook	27	1	27	\$60.00
By Invitation Only: A Novel	Dorothea Benton Frank	eBook	23	1	23	\$27.99
Love and Ruin: A Novel	Paula McLain	eBook	22	1	22	\$65.00
The Sixth Day	Catherine Coulter, J.T. Ellison	eBook	22	1	22	\$19.99
The Perfect Couple	Elin Hilderbrand	Audiobook	21	1	21	\$59.99
Us Against You: A Novel	Fredrik Backman	eBook	21	1	21	\$20.99
The Fallen: Amos Decker Series, Book 4 (unabridged)	David Baldacci, Kyf Brewer, Orlagh Cassidy	Audiobook	82	4	20.5	\$59.99

^{*} The "Consortium Ratio" indicates "All Holds" / copies of the title in the shared collection (including Advantage Plus shared copies).

6.2 TUMBLEBOOK STATISTICS

- a) Libraries can get their TumbleBook usage statistics through their own TumbleBooks page by scrolling to the bottom and clicking on 'Tumble Admin'.
- b) If you do not have a history of statistics there you will want to make sure that you are distributing the link to your library's own unique URL. If you have questions about linking TumbleBooks to your library website contact techsupport@midhudson.org. Graphics and bookmarks are also available in the 'Tumble Admin' section.

7 AWARENESS & ADVOCACY SERVICES (REBEKKAH)

7.1 2018 SENATE BULLET AID ANNOUNCED

a. The New York State Senate has passed a bill awarding grants-in-aid, also known as "Bullet Aid" or Special Legislative Grants, totaling over \$4.3 million to more than 600 libraries in the state!
 MHLS area Senators brought \$348,500 to the libraries in our region!

b. Grants by District:

Senator George Amedore	
D.R. Evarts Library (Athens)	\$5,000
Cairo Public Library	\$5,000
Catskill Public Library	\$5,000
Heermance Memorial Library	¢r 000
(Coxsackie)	\$5,000
Town of Esopus Library	\$25,000
Greenville Public Library	\$5,000
Mountain Top Library	\$5,000
Hunter Public Library	\$5,000
Hurley Public Library	\$5,000
Kingston Library	\$5,000
Saugerties Public Library	\$5,000
Stone Ridge Public Library	\$5,000
Town of Ulster Public Library	\$5,000
West Hurley Public Library	\$5,000
Windham Public Library	\$5,000
Woodstock Public Library District	\$5,000
Senator John Bonacic	40.000
Elting Memorial Library (New Paltz)	\$3,000
Rosendale Library	\$3,000
Senator Kathleen Marchione	
Chatham Public Library (including	
Canaan Branch of the CPL)	\$6,000
Claverack Free Library	\$3,000
Germantown Library	\$3,000
Roeliff Jansen Community Library	\$3,000
Hudson Area Association Library	\$3,000
Kinderhook Memorial Library	\$5,000
Livingston Free Library	\$3,000
New Lebanon Library	\$3,000
Philmont Public Library	\$3,000
Valatie Free Library	\$4,000
Senator Terrence Murphy	A -
Beekman Library	\$2,500
Brewster Public Library	\$2,500
Reed Memorial Library (Carmel)	\$2,500

Mahopac Public Library	\$5,000
Patterson Library	\$5,000
Pawling Free Library	\$5,000
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Senator Susan Serino	
Amenia Free Library	\$6,000
Howland Public Library (Beacon)	\$11,000
Clinton Community Library	\$6,000
Julia L. Butterfield Memorial Library	\$5,000
(Cold Spring)	
Dover Plains Library	\$7,000
East Fishkill Community Library	\$11,000
Blodgett Memorial Library (Fishkill)	\$8,000
Desmond-Fish Library (Garrison)	\$7,000
Hyde Park Free Library	\$10,000
Kent Public Library	\$9,000
LaGrange Association Library	\$10,000
Millbrook Library	\$4,000
NorthEast-Millerton Library	\$4,000
Pine Plains Free Library	\$5,000
Pleasant Valley Library	\$7,000
Poughkeepsie Public Library District	\$13,000
Putnam Valley Free Library	\$8,000
Red Hook Public Library	\$9,000
Starr Library (Rhinebeck)	\$5,000
Morton Memorial Library &	40.000
Community House (Rhinecliff)	\$9,000
Staatsburg Library	\$3,000
Stanford Free Library	\$6,000
Tivoli Free Library	\$4,000
Grinnell Public Library District	\$8,000
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Constant James Coursed	
Senator James Seward	¢2.000
Phoenicia Library	\$3,000
Morton Memorial Library (Pine Hill)	\$3,000
Olive Free Library	\$3,000

7.2 2018 PR EXCHANGE

- a. The 2018 PR Exchange will be held as part of the September Directors Association (DA) meeting on September 5th. At this meeting:
 - Each director will be asked to do a brief (30 second) "show and tell" of their #1 PR success over the past 12 months
 - We will host a panel discussion featuring the 2018 Lab Project library directors who have been working on techniques to activate and retain cardholders

• There will be built in time to talk to directors who are doing something you are interested in learning more about

7.3 DISCOUNTED NYLA ORGANIZATIONAL MEMBERSHIP

- a. MHLS has negotiated another year of the 15% discount on New York Library Association (NYLA) Organizational Memberships [https://bit.ly/1QmL5qe]
- b. For those libraries that took part in the discount bulk order last year:
 - You will receive your 2017 forms (Associate Member Worksheet & Trustee Registration form) so you can review them, if nothing has changed just send them back. If there are updates we'll also enclose blank forms so you can update the info and send it in.
 - o They will be due back to the MHLS Business Office, Attn: Joan Kay by June 29.
 - MHLS will issue your library an invoice based on the information you provide which will be due in July to ensure we keep everyone on the same timeline.
- c. For those libraries that did not take part in the bulk order last year but would like to take advantage of the 15% discount for this year:
 - Please submit the following forms to Joan Kay in the MHLS Business office by June 29th:
 - Associate Member Worksheet: http://bit.ly/2LoCs4O
 - Trustee Registration form: http://bit.ly/2sbgTvT
- d. Questions should be directed to Joan at jkay@midhudson.org

7.4 COUNTY FUNDING ADVOCACY REPORT

a. The 2018 County Funding Advocacy Report will be provided at the DA meeting and will be the subject of the DA Spotlight presentation and discussion.

8 INTERLIBRARY LOAN SERVICES

8.1 NO REPORT FOR THIS MEETING.

9 CONSTRUCTION PROGRAM SERVICES (REBEKKAH)

9.1 Applying for a State Aid for Library Construction Grant

- a. An eligibility list will be developed from the results of responses to Action Memo #18-03: Construction Needs Update & Intent to Apply.
- b. Those libraries are invited to attend the technical assistance workshop scheduled for Monday, June 18th from 10:00am-12:00pm. This workshop should be considered essential if it is your first time applying for this grant.
- c. The grant application portal is predicted to open on June 1. Applications are due on August 3, 2018.

9.2 NEW Webinar: Overview of the Americans with Disabilities Act (ADA)

- a. In partnership with the Northeast ADA Center, MHLS will offer a custom webinar for member libraries on October 5th, 2018 that will provide:
 - o Overview of the ADA
 - ADA definition of "person with a disability"
 - Review of the 5 Titles of the ADA and how they are enforced
 - Focus on ADA Title II obligations for state/local government entities including public libraries
 - Self-evaluation
 - Transition Planning
 - Review of Title II "Program Accessibility" requirements
 - o Discuss ADA Priorities for physical accessibility
 - o Answers to your questions
- b. Please register online for this event: https://bit.ly/2GNnEsN

10 COMMUNICATIONS AMONG MEMBER LIBRARIES

10.1 NO REPORT FOR THIS MEETING.

11 Special Populations (Merribeth)

11.1 STAFF COMPLETION OF EARLY LITERACY TRAINING FROM ALA

- a. Congratulations to the following libraries who had staff complete the ALA eCourse 'Creating Early Literacy Programs: Connecting with Early Childhood Development' this winter. This represents a total 168 hours of professional development!
 - o D.R. Evarts Library
 - Germantown Library
 - Kent Public Library
 - NorthEast-Millerton Library
 - o Olive Free Library Association
 - o Putnam Valley Free Library

11.2 More E-BOOKS TO MORE KIDS THIS SUMMER (THROUGH SEP 2018)

- a. In partnership with and in support of Summer Reading at New York Libraries, myON is providing free, unlimited 24/7 access to myON's Digital Library and Middle School Classics for children from Birth through Grade 8. Access is available now through September 2018 to 6,000+ fiction and non-fiction E-books for students and families with young children through both their schools and public libraries.
- b. Resources were posted to the MHLS Notices list on 5/10/18.
- c. Please direct any questions to the myON team at NYReadswithmyON@renaissance.com.

12 COOPERATIVE EFFORTS WITH OTHER LIBRARY SYSTEMS (MERRIBETH)

12.1 FALL INTO BOOKS 20th Annual Children's & Teen Literature Conference — Early Bird discount deadline July 30

- a. Early Bird Registration must be postmarked by July 30, 2018 for the Fall Into Books 20th Annual Children's & Teen Literature Conference being held on October 24. Information and registration at http://midhudson.org/fall-into-books. Note that for the first time, online registration is available for this event.
- 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 Nick Glass, author presentation from Sandra Uwiringiyimana, 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

13 ADMINISTRATIVE (TOM S)

13.1 MHLS PLAN OF SERVICE

a. Report on Actions Completed & 2018 Actions Underway

13.2 SAVE THE DATE – FRIDAY, NOV. 2 – MHLS ANNUAL MEMBERSHIP MEETING

- a. Location: Locus Grove: Historic Estate, Museum, Nature Preserve http://www.lgny.org/
- b. Time 8:30 AM 12:30 PM
- c. Theme: Libraries Are the Future
- d. Keynote Speaker: Garry Golden, Futurist http://www.garrygolden.com

13.3 MEMBER LIBRARY MILEAGE EQUALIZATION GRANT PROGRAM

- a. Information & Details
- b. Claim Form (due Jul 15 & Dec 15)
- c. Mileage Chart
- d. <u>Library Resolution Details</u>