

## MHLS REPORT TO MEMBER LIBRARY DIRECTORS – NOVEMBER 2019

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

### 1 DELIVERY SERVICES (REBEKKAH)

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#### 1.1 WINTER IS COMING...

- a. Just a reminder that if your library's parking lot is not plowed and/or your walks are not shoveled the drivers may not be able to make a delivery to your library.
- b. If severe weather is predicted the drivers may be sent out the evening before a day with bad weather forecasted to ensure delivery keeps running smoothly. In these cases a message will be sent to the MHLS-Alerts list and posted to the homepage of [midhudson.org](http://midhudson.org)

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

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#### 2.1 WORKFLOW AUDIT REPORT

- a. To start our new contract with Innovative off on the right foot and with confidence, a full system audit was performed to evaluate our installation from the ground up, including:
  - o Review of Installed and uninstalled elements
  - o Configurations & settings
  - o Workflow Analysis
  - o A general evaluation of MHLS staff's understanding and approach to managing the ILS
- b. The onsite review was performed over 3 days, June 19<sup>th</sup>-21, by Ann Talley. A written report was delivered to MHLS, outlining her review in each of the core areas of our system. We also reviewed the inventory of newly available features and functions that were included in our new Sierra success bundle for compatibility, workflow improvement, and need. Ann provided information about the new items in context of current configuration, and what would be required to change if we were to implement.
- c. An important goal of the analysis was to see if we have overlooked configurations that should have been applied. After all, our Sierra implementation was migrated from our Millennium install from 2002. We went over our system as if it were a new installation. Ann asked many questions about how we manage collections, transactions and policy. In our current configuration Ann found to workflow improvements which we implemented already. Overall, we are in excellent shape.

*"It was a pleasure working with your knowledgeable and highly dedicated staff. All in all, the system is in good shape and should continue to serve you well in the future, especially after you have completed the changes we discussed and products from Sierra Bundle have been implemented."* -AnnTally

- d. The Audit was funded by the Members' Capital Fund as per the authorization by the Directors Association in February 2019. It is available by request to any director who wishes to review the report in full.

## 2.2 ILS ROAD MAP UPDATE:

- a. We successfully implemented text messaging on October 1<sup>st</sup>. We can tell that almost 400 people have opted into the service in the last month. It is not possible to know how many messages are being sent, a known flaw of the product. If you have feedback, questions or concerns, please let us know.
- b. The installation of Decision Center has been delayed on Innovative's side of the work due to unanticipated issues that arose due to the migration to Amazon Web Services. This has pushed out our intended rollout timeline. We are not letting that stop progress! We have begun preparations to move the Mobile Worklist product forward, the next prioritized item on the ILS Road Map.
- c. Mobile worklist is a mobile app that is available in the Apple App store. It is intended to provide staff with tools to manage list based tasks right in the stacks [Documentation is available in the Knowledge Base](#) site. Check out this [Video Intro](#) to learn more. The Mobile Worklist introduction will begin at the county Directors meeting with a demo by Laurie. We have set some training dates set for 2020 (Kinderhook on 1/7, MHLS 1/8 & Kent 1/9), and will also be showcasing Mobile Worklists at the Spring session of the Sierra User Group. Innovative plans to add Title and Item paging to the menu of available tasks. That's right! No more paper! Real time paging on a handheld device will be available in the next release of Mobile Worklists.
- d. We are very close to replacing the teleforms system with a more modern system, Itiva from Talking Tech, that was included in our Sierra Success bundle as a concession from Innovative. The Teleforms Telephone Notification System (TNS) has not been updated or even supported by iii and is using very old code and hardware. Teleforms has been problematic over the last 2 years and we expect significant improvements with the updated system. We have very positive testimonials from others who have made the switch. To move this forward, MHLS has purchased new server and communications hardware, which was necessary to meet the specifications for the product. The new TNS will be set up to run over our high-speed Voice Over IP connection. We are in a queue for installation of the software and expect to be transitioning in November. When we have a better understanding of the product and the timing of the rollout, we will post information to the Knowledge Base page and post to the notices list. We appreciate and understand that there has been a great deal of frustration and patience around the Teleforms product and we are also looking forward to a better service. We will be sending out the annual Action Memo for TNS participation. If your library is not currently using TNS, you will have the opportunity to opt in. Teleforms pricing is based on the number of participating libraries, the action memo will include a cost estimate, based on current participation.

## 2.3 TOWN CODE FIELD REVISIONS PROJECT UPDATE

- a. We have finished our assessment of the scope of work for the Town Code Project, a project approved by the DA at their September meeting. The project deadline will be extended to

December 31, 2020 to allow for county-by-county discussion and identification of data sets to match up to new codes.

- b. Training for all staff once town code list is edited will be provided

## 2.4 DAYS CLOSED UPDATE FOR 2020

- a. It is that time of year again. We need to know when you will be closed next year in order to edit the Sierra closed dates table. The easiest way to let us know the dates you will close is to complete the [Days Closed Form for 2020](#), which you can find in the Library Administrator's Toolbox of [KB.Midhudson.org](http://KB.Midhudson.org).

## 3 COORDINATED IT SERVICES (LAURIE)

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### 3.1 ERATE TRAINING

- On November 18, from 2:00-3:30pm, the State Library will offer "Introduction to filing for E-Rate" webinar. It will be presented by Win Himsworth of E-Rate Central. Registration details will be coming soon. Any questions should be directed to [natalie.mcdonough@nysed.gov](mailto:natalie.mcdonough@nysed.gov) or 518-486-2194

### 3.2 PURCHASING EQUIPMENT CLOSED FOR 2019

- a. Each year we have a deadline for equipment purchasing. The deadline makes it possible to receive all orders and have the invoices paid before the MHLS business office closes the books. [The deadline is always available on the Equipment Form](#) and this year the close date was 10/31 as noted in our posting to the MHLS-Notices list.

### 3.3 MOVE TO AMAZON WEB SERVICE

- a. On 9/25 our Sierra and Encore servers were moved into Amazon's Web Service (AWS). Amazon's security requires that all incoming traffic be identified by a known IP address that is identified with your site. This is called a static IP. Static IPs are assigned to a customer by the Internet Service Provider (ISP) and do not change in the event of a power loss or a restart of your network equipment. It becomes your ID, essentially, and provides the level of security necessary to access Sierra in the Amazon environment. Each library should be using a business level Internet connection with a static IP. If you are unsure if you have a static IP, you should contact your ISP to find out. This should be considered a minimum requirement for internet access for your library.

### 3.4 SUPPORT CONTRACT RENEWALS

- a. As this year draws to a close, we are beginning a new Technology Support program. Libraries who use MHLS to manage their networks and computer equipment will be receiving their contracts this month for the 2020. Our [support menu](#) is posted on [KB.midhudson.org](http://KB.midhudson.org) and is up-to-date with 2020 pricing.

## 4 PROFESSIONAL DEVELOPMENT & CONTINUING EDUCATION (CASEY)

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### 4.1 ADVOCATES & AMBASSADORS WORKSHOP

- a. This workshop will help library staff, directors, trustees and friends win public support and attract public funds to benefit their library. Participants will learn to craft messages that will generate supporters and followers for their library. At the workshop, we'll review how funding works at the local, county and state levels and spend the majority of the workshop on effective advocacy strategies for delivering messages that resonate with your audience.
  - Saturday, November 9<sup>th</sup> from 10:00am-12:00pm @Hudson Area Association Library  
Register: <http://bit.ly/33Bq0lc>
  - Thursday, November 21<sup>st</sup> from 5:30-7:30pm @MHLS Auditorium  
Register: <http://bit.ly/2KADwEw>
  - Tuesday, December 10<sup>th</sup> from 10:00am-12:00pm @Kingston Library  
Register: <http://bit.ly/2NauAY9>

### 4.2 CIVIL SERVICE 101 WORKSHOP

- a. This workshop is appropriate for library directors, managers and human resources staff in municipal public libraries, special district public libraries and school district public libraries. This workshop is designed to provide an introduction to administering human resources in a public library in a civil service environment. In this workshop we will: Review the purpose and structure of Civil Service Commissions in New York; What should be in place at your library to ensure compliance; Best practices to ensure you are hiring great people, disciplining correctly and protecting the library when someone needs to be fired. Facilitated by Geoff Kirkpatrick, Director, Bethlehem Public Library & Chair of the New York Library Association's Taskforce on Civil Service.
  - Wednesday, January 15<sup>th</sup> from 10:00am-12:00pm @MHLS Auditorium
  - Please register online: <http://bit.ly/34aLY49>

## 5 CONSULTING & DEVELOPMENT (CASEY)

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### 5.1 2020 TURNING OUTWARD REGISTRATION

- a. An recording of the introductory webinar and more info about the 2020 MHLS Turning Outward Cohort is available at <https://midhudson.org/turning-outward/>.
- b. Dates to save if you plan to participate:
  - **March 6 - Kickoff event at MHLS Auditorium**
  - March 13 - Action Plans due to MHLS
  - April 7 - Online Meetup
  - May 6 - Online Meetup
  - June 10 - Online Meetup

- **July 16- In-person meeting at MHLS Auditorium**
  - August 5 - Online Meetup
  - September 9 - Online Meetup
  - October 7 - Online Meetup
  - November 18 - Online Meetup
- c. Self-nomination form due: **December 15, 2019**

## 5.2 2020 LAB PROJECT

- a. MHLS Lab Projects invite a small group of library directors to work on developing methods for rapidly improving a particular metric. Together, the group, along with MHLS staff, will explore best practices, develop action plans and receive support for the implementation of their action plans. At the conclusion of the Lab Project there will be a System-wide event to share the key findings from their experiences. Participation involves attendance at in-person events to develop ideas and plans and multiple online events to report on action plan progress.
- b. 2020 Focus: Increasing Yes Votes**
- c. The 2020 Lab Project will be focused on libraries with 414 votes to make the best use of a common campaign timeline (January-Election Day) for the cohort. Interested directors may contact Casey at [cconlin@midhudson.org](mailto:cconlin@midhudson.org)

## 5.3 PROPERTY TAX CAP FORMS ARE DUE FOR MANY LIBRARIES

- a. Libraries with calendar fiscal years (January-December), who have their own board and have ever held a public vote on their budget, are required to submit the online Property Tax Cap form prior to the adoption of their 2019 budget.
- b. For more information: <https://www.osc.state.ny.us/localgov/realprop/localgovernments.htm>

## 5.4 THE GREAT GIVE BACK

- a. During the month of October, 35 libraries in the Mid-Hudson Library System participated in the pilot year of the first state-wide initiative of The Great Give Back. These libraries provided a day of opportunities for library patrons to participate in meaningful community service experiences. Community service opportunities that libraries planned as part of The Great Give Back included food drives; pet adoption events; collections of items like socks, soap, and shampoo for people in need; a volunteer fair; art and writing projects to benefit the community; and an organ donor enrollment event. Many libraries also partnered with other organizations such as local fire departments, local food pantries, and local women's shelters to build connections in their communities and increase the impact of their efforts. This pilot program was brought to our region thanks to a partnership between the Suffolk Cooperative Library System, the Mid-Hudson Library System, the Public Library System Directors Organization of New York State (NYS) and the Sustainable Thinking & Action Round Table (START) of the New York Library Association in recognition of the critical role libraries play in [collective impact](#) projects that help to co-creating sustainable, resilient communities throughout New York. Thank you to all the libraries that participated this year.

- b. If your library would like to join in The Great Give Back next year, there will be an informational webinar in the first quarter of 2020. Questions? Contact MHLS Outreach & Engagement Specialist, Courtney Wimmers at [cwimmers@midhudson.org](mailto:cwimmers@midhudson.org)

## 5.5 2018 ANNUAL REPORT DATA POSTED

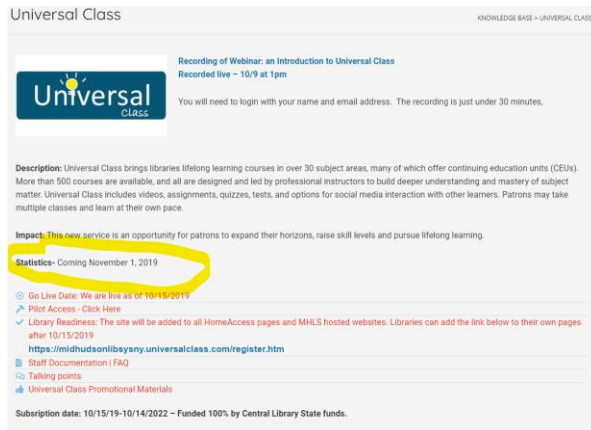
- a. MHLS has compiled member library Annual Report data for 2018 into reports organized by topic and county. These reports have been posted to our site at <https://midhudson.org/topics/statistics-research/annual-report/>
- b. Please review the reports, and provide any feedback to Casey Conlin at [cconlin@midhudson.org](mailto:cconlin@midhudson.org)

# 6 COOPERATIVE COLLECTION DEVELOPMENT & DIGITAL COLLECTION ACCESS (LAURIE)

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## 6.1 STATISTICS FOR E-RESOURCES

- a. If you are in search of statistics for our shared E-Resources, point your browser to the [Library Administrator’s Toolbox](#) in the brand new MHLS Knowledge Base. The E-Resources section includes an entry for each of our shared resources. Within each E-Resource page there is a *Statistics* link.



## 6.2 OVERDRIVE ISSUES

- a. The following statement was issued by Overdrive:

*On July 25, 2019, OverDrive communicated that Macmillan US would be making changes to their ebook lending terms. Below is a reminder of the updates that will go into effect **November 1, 2019**:*

- *During the first eight weeks from an ebook’s publication, libraries can purchase one unit under the One Copy/One User (OC/OU) model. The expected price of the OC/OU unit will be \$30 USD*

*for most titles. All libraries, including standalone systems, consortia, and Advantage members, will be able to purchase the single OC/OU unit.*

- *After the first eight weeks of an ebook's publication, libraries can purchase additional copies under the Metered Access model with each purchased copy subject to a two-year term limit. The expected price will be \$60 USD per unit for most titles.*
- *After one year from an ebook's publication, libraries can purchase additional copies under the Metered Access model with each purchased copy subject to a two-year term limit. The expected price will be \$40 USD per unit for most titles.*
- *These terms apply to the Macmillan US ebook catalog in all applicable territories and exclude other catalogs, such as Pan Macmillan or Macmillan Australia.*
- *There are no changes to the lending terms for audiobook titles. Audiobook titles will remain available in the OC/OU model.*

*In anticipation of these changes, we would also like to share the following:*

1. *Preorders placed on or before October 31, 2019 will be converted to one OC/OU unit to be purchased on the date of publication. If you wish to make changes to existing preorders, please contact your Account Manager.*
2. *Beginning November 1, 2019, Macmillan US ebooks will no longer be eligible to move or share through Advantage Plus. Any ebooks that have been moved or shared prior to November 1, 2019 will not be affected.*
3. *We understand that there will be challenges with managing these changes, so we've created [this guide](#) to assist your library.*
4. *When there's a wait list, we will add the following message in Libby and your OverDrive website: Due to publisher restrictions, your library is unable to purchase any more copies of the book until {date}. The messaging will be removed when the title is available to purchase under the Metered Access model.*

### **6.3 OVERDRIVE CONTENT CREDIT**

- a. At times (like the end of the year) you may wish to purchase OverDrive content credit to use for future spending. Instructions via OverDrive Marketplace Help at [https://help.marketplace.overdrive.com/customer/en/portal/articles/2669855-howtopurchase-content-credit?b\\_id=15212](https://help.marketplace.overdrive.com/customer/en/portal/articles/2669855-howtopurchase-content-credit?b_id=15212).

### **6.4 E-MAGAZINE ORDER UPDATE**

- a. Thanks to some great work by the Central Library / Collection Development Advisory Committee, we are prepared to renew the RBdigital electronic magazine subscription for 2020.

The CL/CD Committee, Columbia County, Putnam County, Ulster County, and PPLD have agreed to renew all of the titles previously purchased. PPLD will renew the titles previously purchased by East Fishkill and has already added an additional copy of The Economist. We have not yet been given the 2020 order form by RBDigital, so stay tuned for possible title changes that may be coming.

## 7 AWARENESS & ADVOCACY SERVICES (CASEY)

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### 7.1 CENSUS 2020 UPDATE

- a. Resources to Get Out the County including promotional materials customized for libraries are now available at <https://midhudson.org/census-2020/>.
- b. County governments are starting to create complete count committees or convening groups to do work similar to a complete count committee to get the word out and help facilitate people complete the Census questionnaire. ***We encourage libraries in each county to advocate for a library representative on such committees and groups.***
- c. Look for staff training in January and February in each county on what to expect when the Census opens in April and how staff can answer questions and help people complete their questionnaire and get counted.
- d. For more info about the Census, contact Casey at [cconlin@midhudson.org](mailto:cconlin@midhudson.org)

## 8 INTERLIBRARY LOAN SERVICES – NOTHING TO REPORT (LAURIE)

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## 9 CONSTRUCTION PROGRAM SERVICES (CASEY)

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### 9.1 STATE AID FOR LIBRARY CONSTRUCTION UPDATE

- a. New legislation passed and signed into law by the Governor:
  - o 90/10 reduced match guidelines as defined in legislation:
    - No more than 10% of the total funds allocated to a library system may be used for the 90/10 match option.
    - A library is required to demonstrate “...that the average poverty rate within the library’s service area is equal to or greater than the New York State average poverty rate using Federal Census data; and the library must demonstrate that it lacks the capacity to provide twenty five percent of the project costs.”
    - If a library is deemed to qualify for the 90/10 match, all of the 90% aid must be allocated from that system’s 10% cap.
      - Example: If system A gets a total allocation of \$1,000,000, then it may use up to \$100,000 to provide aid at the 90/10 reduced match level. If system A decides that library B meets the qualifications for the 90/10



reduced match for its \$50,000 project, then the entire 90% or \$45,000 state funding for Library B's project must come from the \$100,000 total.

- Coordinated project applications at the system level
  - We are currently waiting on more information from DLD about how to best administer grants using this option.
- a. All MHLS member libraries who applied for the 2019-2020 funding round have been recommended for grants by the MHLS Board of Trustees. Those applications are now under review by the NYS Division of Library Development.
- b. Want to apply next year? Watch for updates on the Notices list and at <https://midhudson.org/nysconstructiongrant>. You can also start getting your Facility Plan updated, getting an energy audit, and attending Advocacy Day on February 25, 2020 to let your legislators know this funding is important to you and your library.

## 10 COMMUNICATIONS AMONG MEMBER LIBRARIES (CASEY)

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### 10.1 NO REPORT FOR THIS MEETING

## 11 SPECIAL POPULATIONS (CASEY)

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### 11.1 OUTREACH 2019 MINI-GRANT RECEIPTS & FORMS – DUE NOVEMBER 14

- a. Thirty-six member libraries were notified of the approval of their 2019 Outreach Mini-Grants (funded by NYS 2019 Outreach Categorical Aid, administered by MHLS) – Amenia, Beekman, Brewster, Cairo, Chatham, Claverack, Clinton, Dover, D.R. Evarts, Town of Esopus, Hudson, Hunter, Hurley, Kinderhook, Lagrange, Marlboro, Morton (Pine Hill), Mountain Top, North Chatham, Olive, Patterson, Pawling, Philmont, Phoenicia, Pine Plains, Red Hook, Roeliff Jansen, Sarah Hull Hallock, Saugerties, Staatsburg, Stanford, Tivoli, Valatie, Wappingers, West Hurley, and Woodstock.
- b. A reminder that the Receipt Form with all receipts attached (dated 1/1/19 – 11/1/19) must be sent in to MHLS Business Office before November 14, 2019 for reimbursement. The short final report must also be filled out. The Receipt Form and final report link can be found at [bit.ly/outreachminigrant](http://bit.ly/outreachminigrant). Please contact Courtney Wimmers, Outreach and Engagement Specialist at [cwimmers@midhudson.org](mailto:cwimmers@midhudson.org) or 845-471-6060 x 253 if you have any questions.

## 12 COOPERATIVE EFFORTS WITH OTHER LIBRARY SYSTEMS (REBEKKAH)

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### 12.1 COORDINATED ADVOCACY VISITS

- a. We have been partnering with two of our regional allies, the Ramapo Catskill Library System and the Southeastern New York Regional Library Resources Council to advocate for increased state aid for libraries over the past several months.

## 13 ADMINISTRATIVE (REBEKKAH)

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### 13.1 MHLS ACHIEVES GREEN BUSINESS CERTIFICATION

- a. MHLS is just the second public library system in New York State to achieve Green Business certification through the Green Business Partnership, the first phase of certification under the New York Library Association's Sustainable Library Certification Program.
- b. [MHLS' final presentation is viewable on the GBP web site](#)
- c. Key takeaways:
  - o While many MHLS employees had already been making good choices on behalf of our organization, thanks to this process our organization is now purposefully making better choices and has a new culture of deliberate evaluation of our choices.
  - o Sustainability is a journey, not a destination
  - o Many of the right choices also save our organization money (i.e. the switch to LED lighting, reusable hospitality items, thoughtful office supply purchasing)
  - o We are a stronger team thanks to this experience
- d. If you are interested in pursuing this certification for your library please contact MHLS Library Sustainability Coordinator Casey Conlin ([cconlin@midhudson.org](mailto:cconlin@midhudson.org)) for more information and support.

### 13.2 MILEAGE EQUALIZATION GRANT PROGRAM DEADLINE: DECEMBER 15<sup>TH</sup>

- a. [Information & Details](#)
- b. [Claim Form](#) (due July 15 & December 15)
- c. [Mileage Chart](#)
- d. [Library Resolution Details](#)

### 13.3 MHLS TRUSTEES

- a. At the 2019 Annual Membership Meeting three trustees were elected for 5-year terms commencing January 1, 2020:
  - a. Mark Wilson, representing Columbia County
  - b. Richard Swierat, representing Dutchess County
  - c. Mary Linda Todd, representing Greene County

### 13.4 A LOOK BACK...

- a. 2019 has marked my first year as MHLS Executive Director. It has been a busy year, with both opportunities and challenges, often at the same time on the same topic! We accomplished much this year thanks to the collaborative work among the MHLS staff, member library directors and MHLS Board. Here are just some of the highlights of what we have achieved:
  - We solved a financial challenge to help facilitate the move to a new delivery service vendor.
  - We created standard operating procedures for all delivery stops at member libraries.

- We signed a new contract with our ILS vendor, Innovative Interfaces (III), which greatly enhances our ability to implement new products that should enhance the user and staff experience while controlling costs for the next five years.
- We approved funding to facilitate training for the MHLS staff by III for the first time in a decade.
- We implemented Auto Renewal.
- We implemented text messaging .
- We migrated our installation of Sierra and Encore to a more secure web hosting platform (AWS).
- We have improved and streamlined the first section of the Resource Sharing Standards.
- We created a brand-new Knowledge Base to put better information at your fingertips to help run your library.
- We introduced Universal Class, online classes for our patrons, systemwide.
- We successfully advocated against Governor Cuomo’s cut to the State Aid for Library Construction Program.
- We successfully advocated for a 90/10 reduced match opportunity within the State Aid for Library Construction Program.
- We introduced two new round tables for Local History & Special Collections and Social Media.
- We brought back the Programmers Users Group
- We offered a full complement of trustee education opportunities at the essential, intermediate and advanced levels.
- We piloted The Great Give Back.
- We achieved Green Business Certification.
- We welcomed three new MHLS staff people: Casey Conlin, Courtney Wimmers (well, not *new* new but in a new role)!, and Kerri Carptenter.

*Thank you.* It is pleasure to work with you and I look forward to our next chapter we will write together!