MHLS Report to Member Library Directors | November 2023

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

1. **Delivery Services**
   a. MHLS has a total of four holidays in November and December where there will be no delivery. A general reminder to factor in MHLS holidays when pre-sorting materials to expedite forward sorting on route. Always pre-sort for your next MHLS scheduled delivery day after a holiday. MHLS will send a reminder to the notice list prior to any holiday and delivery routes by day and library are at https://midhudson.org/topics/resource-sharing/delivery/

   b. MHLS Delivery Operations has helped numerous libraries over the years with temporary storage when members are completing construction or renovation projects. Let us know if you have any projects coming up that will affect your delivery and we will assist with storage if needed. We recently stored accumulated bins for the Kingston Library while they were closed for two weeks during their move to temporary headquarters at 61 Crown Street.

   c. The Delivery Operations department tracks the number of bins that come into MHLS daily and saw an increase of 137 bins into MHLS in October 2023(2433 bins) compared to October 2022(2296) bins. This was the most significant increase of the year, however, overall, delivery count is still significantly down over pre-pandemic numbers (-25%).

2. **Integrated Library System & Cataloging Services**
   a. **Full Pilot Launch**: Discover.midhudsonlibraries.org (Vega Discover catalog) expands to all libraries on December 6!!! We couldn't be more exited to report that we have a date to Launch access to Discover.midhudsonlibraries.org .

      Resources for the launch https://kb.midhudson.org/vega/

      If there is anything that MHLS can do to help you and your staff be more prepared for this change we are here to help. Please reach out to us through techsupport@midhudson.org to start the conversation ASAP and we will find a path forward.

   b. **Owning the Brand:** As we launch this product as our own you will notice we are actively dropping the word "Vega". This platform name, like Encore before it, holds no connection for our communities. Our patrons are now invited to "Discover" the member library resources in a new way and we will celebrate that in our promo materials and documentation, just as we have done in our site URL.

   c. Discover.midhudsonlibraries.org now includes "Guides". Guides will offer patrons pop up instruction as they navigate through the catalog. They will pop up for users who are first time visitors or not logged in. Returning visitors, whose login is retained for 90 days, can revisit the guides using a button on the top toolbar or help buttons located near the search bar.

   d. Discover.midhudsonlibraries.org is in development – One of the best things about this catalog is that it is under development-always! This means that we will have changes on a regular basis.   Unlike Sierra and Encore, where we schedule updates, Vega updates are pushed out to all customers at once. We might have the ability to flip a switch or add a feature, but there will also be changes that globally appear.

Generally, change happens every two weeks, but there will also be updates that take place within the schedule to correct flaws or to complete a task that was scheduled for a previous release but didn't make the deadline for the push. These changes are no surprise to MHLS staff. We have been part of the process and have had the opportunity to help dictate the development of these elements and we also have a good idea of what is included in the next software update.

MHLS Technology Operations staff will soon be launching a post on Knowledgebase to include a rolling entry of updates in a blog style. We will also post the same information to the notices list as the information becomes available.

e. **The Sierra Users Group** met on October 25th to review recent and upcoming enhancements to Sierra. Courtney Tsahalis shared her experience with Genrefication It was the first-time users came together in person since before the pandemic, and though it was a small group the interaction and conversation were lively. This is an opportunity for Sierra users to learn and grow with each other. We encourage you to send us ideas for the Spring meeting, which will be a web-based event.

f. It is that time of year when you are asked to **review the staff who have access to Sierra** and respond with those names who must be eliminated. Please let us know as soon as possible who should be removed. This is a key cybersecurity activity and we ask for your diligence in keeping this list up-to-date as staff leave your organization.

g. **Closed Dates:** It is also that time of the year to submit your days closed for 2024 (I know – where does time go!) You have the option to edit your own in the Sierra days closed table, but please follow the patterns for adding dates as mm/YY and of course, if your closed dates for 2023 do not match the 2024 dates they must remain in place until the date has passed.   The other option is to use our web form to submit your dates and MHLS Technology Operations will see to it from there.

h. **Preferred Name:** A new field in Sierra's patron record provides a new opportunity to allow patrons to use a preferred name over their Legal Name in the Patron Name field. Staff can move the legal name into the new Legal Name field for storage and use in billing templates.

i. **Product Portal to replace Idea Lab:** Innovative has transitioned the enhancement process from the IUG led Idea Lab, to a 2-stage portal system. Product Portal is the place where Innovative maintains the road maps for the entire product line. Each product is set apart in its own tab. Once you select a product, you can scroll down to see what the next release includes. Scrolling further you can also review the next release after that. Beyond the next two releases are enhancements that have made it to the roadmap, but have not yet been assigned to a release. Each of the cards may be clicked on for a tiny bit more detail. More importantly, once you open the card *you have the opportunity to weigh in on the importance of enhancement*. You do have to go through an email verification process to complete the vote. These product votes will have considerable impact on when and even if the enhancement is completed.

The other opportunity is the **Idea Exchange**. Select the product forum to review the ideas that have been submitted. You can vote these enhancement ideas forward in a similar process to Product Portal, but here you have a free text comment. In some, you will see Innovative has added comments to the idea to provide a progress report. The comments are valuable and garner more traction. You also must verify your email in this process. For product portal MHLS owns the products listed below:

- ILS-Sierra
- Vega Discover
- Vega Guides
- LX Starter

While you are free to use either of these sites to provide feedback MHLS technology operations would be happy to review the idea that you would like to submit or answer questions that you may have about what you find. For your convenience both are now included as links from the first Page of Knowledge Base under "Learn Connect"

3. **Coordinated IT Services**
   a. **MHLS Tech Support Contracts:** Each year at this time we ask member libraries with a MHLS Tech Support Contract to review and commit to a new contract for the coming year. Those libraries who are currently enrolled in our support contracts will receive the renewal contract through our delivery. The renewal will match the current plan. If you would like to step up your plan or down, let Laurie Shedrick know, and a revised plan renewal will be sent. The IT plan descriptions, pricing and documentation of the services is available on Knowledge Base site. If you are not enrolled in the plan and would like to discuss the service reach out to either Laurie Sherick or Gerry Formby at MHLS.

4. **Professional Development & Continuing Education**
   a. **Library Sustainability**
      - **MHLS EDI in Libraries Series: Resilience: This Moment and Beyond**, Online, November 13th, 2:00 -3:00 pm | REGISTER
      - **Living Our Values Out Loud: Programs that Walk the Talk** Online, November 28th, 2:00 -3:00 pm | REGISTER
      - **New Directors Forum**, Online, December 5, 10:00 am – 12:00 pm | REGISTER
      - **Stronger Together: Collective Impact and Climate Action**, Online, December 13th, 2:00-3:00PM | REGISTER
      - **Trustee Essentials**, IN PERSON at Mahopac Public Library, December 14th, 10:00 – 11:30 AM | REGISTER Library board members looking for essential, basic information to increase their effectiveness in serving on a library board will benefit from attending this session.
      - **Trustee Handbook Book Club: Financing & Managing Construction Projects**, ONLINE, December 19th, 5:00PM – 6:30PM | REGISTER
        Join co-author of the Handbook For Library Trustees of New York State Rebekkah Smith Aldrich and friends for a deep dive into financing and managing construction projects.

   b. **Technology Operations:**
      - **Sierra Data Entry: How Brief is Too Brief** Online, November 9th, 1:00 – 3:00 pm | REGISTER

      - **Vega for Member Libraries**
        1. **In Person:** Town of Esopus Library, November 16th, 10:00 am -12:00 pm | REGISTER
        2. **Online:** November 27th 1:30-3:00 pm | REGISTER
      - **Introduction to OverDrive MarketPlace**, Online, December 7th, 1:00-2:30 pm | REGISTER

   c. **New Additions to MHLS Training on Demand**
      - **Technology Academy**

1. Public Access Catalog – Vega Discover – core competencies
    a. My Bookshelf and user Profile
    b. Bookmarks, Saved Searches and reading History
    c. Searching
    d. Resource Pages
    e. Concepts and Persons – explore connections to related subjects and contributors
    f. Holds
    g. Homepage-navigation, customization and more
    h. Library Collection sites and Kiosks
    i. Showcases and Embedding lists
2. Cataloging and Data entry Changes for Vega Discovery
3. Creating strong passwords
4. Multifactor Authentication
5. Phishing: Don't take the bait!
6. Take the 1st steps towards better cybersecurity- four goals
7. Updating software

- **Library Sustainability Academy:**
    1. [Advocating for Equitable Access to Digital Books](#)
- **Trustee Education Academy**
    1. [Advocating for Equitable Access to Digital Books](#)
    2. [Trustee Handbook Book Club: Equity, Diversity, Inclusion, Access & Justice](#)

5. **Consulting & Development**
    a. **New Trustee Handbook Available:** Copies of the new edition of the Handbook for Library Trustees of New York State will soon be available in print from MHLS and digitally on the DLD site. Details for accessing and for ordering print copies will be forthcoming.

    b. **The [Sample Public Library Policies & Policy Development Tips](#) page on midhudson.org has been upgraded.** The updated policy checklist found in the new Trustee Handbook is now reflected on this page and all examples are new and current. This page is augmented with resources related to many of the policies to provide background and reference materials. Thank you to the many MHLS member libraries who authorized us to use their policies as examples!

    c. **Sexual Harassment Prevention Training Reminder**
    This is a reminder that all NYS employees and trustees must complete sexual harassment prevention training annually. For guidance on making sure your Library's sexual harassment prevention policy and training meeting the requirements of the law, [view the MHLS webpage on this topic.](#)

    d. **For libraries in the state retirement system (ERS):** All employers must switch to enhanced reporting by the end of the year. "Gold Certification" will get you started. [Learn more here.](#)

    e. **Property Tax Cap Forms Due:** 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 your 2024 budget. For more info: [New York State's property tax](#)

[cap (ny.gov)](cap (ny.gov))

6. **Cooperative Collection Development & Digital Collection Access**
   a. You may be noticing a BIG increase in the number of emags that are checking out. The increase is due to a change in the Libby app that streamlines access to the magazines and a new subscription option that appears in the search results.

      When a user has subscribed and anew issue is released:

      - The issue is automatically added to the user's Magazine Rack.
      - A checkout is generated for your library.
      - The user will receive a notification based on their Libby notification preferences (in-app, push, or email).

   b. Universal Class and OverDrive have decided to part company. The decision impacts us in a couple of ways. First the access to Universal Class will be removed from the Libby app in September of 2024, which means we will be going back to providing the direct URL to their portal, as we did prior to their merge. Since we Never removed the direct access from our supported websites, there will be little change required unless libraries who manage their own sites had removed it. The other impact is pricing. OverDrive had reduced the cost significantly while they were managing the product. When it returns to RBDigital we will nearly double the cost. Our contract renewal takes place in September of 2024.

   c. Transparent Language has added to their specialized training for library staff
      - Getting Started with Transparent Language Online
        Monday, December 11, 2023: 10-11am (US) EST-Register

      - Supporting Your ELL Community with Transparent Language Online
        Wednesday, December 20, 2023: 1-2pm (US) EST-Register

      - Supporting young Learners with Transparent Language online

        Thursday, January 20, 2024: 10-11am (US) EST-Register

      - Supporting Your ELL Community with Transparent Language Online
        Wednesday, December 20, 2023: 1-2pm (US) EST-Register
      - Transparent Language Online: Reporting and Marketing
        Wednesday, January 17, 2024: 11am-12pm (US) EST-Register

7. **Awareness & Advocacy Services**
   a. Please watch for a **call to action** in the coming weeks to reach out to the Governor to make the case for move funding for libraries and library systems in her executive budget.

   b. **Save the Date: Library Advocacy Day** will be earlier than usual next year: February 7th.

   c. **414 Bill Signed into Law:** Governor Hochul has signed [S3594](S3594), the bill to reduce the number of petition signatures for libraries to get onto the municipal ballot into law. Association and Municipal Public Libraries will now only need 25 signatures, the same as the school district ballot. New resources will be developed to help library boards take advantage of this change in the law, including a new edition of *Inch by Inch, Row by Row: Using the Municipal Ballot Option in Education Law 259 (1)(b) to Obtain Sustainable Funding for Your Library*

d. **NOVELny Update:** Folks in Albany are still in talks to decide the future of NOVELny. While the State Library may no longer be able to afford the program, others in the state agree it is an important resource and are working to find a path forward. Stay tuned…

8. **Interlibrary Loan Services**

    a. Southeastern NY Library Resources Council has upgraded their SEAL (Southeastern Access to Libraries) platform. SEAL is used to provide access and facilitate Inter Library Loan requests with libraries in our region and outside of the MHLS library System. The new platform includes a cleaner more refined look but also includes a number of features that enhance workflows. Leading up to the launch, a recording of the web based training prior to the deployment is available. It is a brief walk through of the new features, led by SENYLRC's Kelsey Milner.   This is a great share for those who could not attend!

        - Profile management for your library – you can see who else at your site has a login.
        - Easy on/off control to suspend lending for temporary situations
        - Improved Individual account management
        - Suggestions for delivery based on delivery options and profiles between lenders and borrowers
        - Bulk actions have been added
        - Quick sidebar access to Training, Lib Guides, Documentation and support
          Note: Logins were carried over to the site at the end of July. Staff who have made edits to their password in the last 3 months will likely require a password reset. You can Contact Kelsey Milner with any questions at kelsey@senylrc.org

9. **Construction Program Services**

    a. **State Aid for Library Construction Project Numbers and Deadlines**
        Projects have 6 years to be completed (Chapter 333 of the Laws of NY 2022).
        0386-19-**** - July 1, 2018-June 30, 2024
        0386-20-**** - July 1, 2019-June 30, 2025
        0386-21-**** - July 1, 2020-June 30, 2026
        0386-22-**** - July 1, 2021-June 30, 2027
        0386-23-**** - July 1, 2022-June 30, 2028
    b. 0386-23-**** State Aid for Library Construction Programs Announced.

10. **Communications Among Member Libraries**

    a. **Library Information Update Request**: In order to effectively communicate with our members, the Mid-Hudson Library System maintains a database of contact information for our member libraries. Once a year we request an update of this information, to keep our records accurate. An Action Memo will be sent out via the MHLS-Notice List in January 2023 for all member library directors to complete 8 and submit.

11. **Special Populations**

    a. No report this month. Please contact Kerstin Cruger, MHLS Outreach & EDI Specialist with questions: kcruger@midhudson.org

12. **Cooperative Efforts with Other Library Systems**

a. **Digital Navigators of the Hudson Valley**
The [application](#) for the winter 2024 session, which will run January 2024 - March 2024, is now open for individuals affiliated with libraries and organizations in the Hudson Valley. The program is open to anyone who works at a library or a community-based organization that would like to offer Digital Navigator services to their patrons. This cohort is open to both individuals who have previously trained as a Digital Navigator and those who are new to the program. [Visit the Digital Navigators of the Hudson Valley website to learn more and view the requirements for the program](#).

13. **Administrative**
   a. We are pleased to welcome **new staff members to MHLS**:
      - Elizabeth Garcia, Finance Assistant
      - Ashley Teal, Administrative Assistant
      - Stephanie Wersky, Library Sustainability Associate & Communication Specialist

   b. **Plan of Service Check-in:** Given that MHLS is about mid-way through our Plan of Service lifespan we want to check in with directors to ensure we're continuing to design programs and services that meet your needs. To that end, in the first quarter of 2024 we will be hosting a new round of Community Conversations at your county meetings. The questions will be the same as those used to create the current Plan of Service:
      - **What kind of library are you working to create? What goals do you have for your library in the coming years?** *(We are looking for answers that describe the broad attributes/reputation of your library in the future. For example – a library that is accessible to all; that is seen as a leader on the topic of digital inclusion; whose staff are digitally literate; that contributes to school readiness/positively impacts high school graduation rates; contribute to community resilience, etc.)*
      - **Why is that important to you?** *(We are looking for answers that describe your values and how this will make a difference in the lives of those served by your library. For example – because you believe a functioning democracy depends on an informed electorate; because not everyone in your community has access to broadband and that is key to financial/student success; because you believe people need to respect diversity and work together to strengthen the community's resilience, etc.)*
      - **How is that different from how you see your library now?** *(We are looking for answers that provide a "gap analysis," identifying areas for opportunity for your staff, governance, facility, technology, outreach and partnership activities. For example – you want to be known as a tech savvy library, but current staff do not have the know-how to be comfortable helping patrons with tech or building digital collections; you want to be the community gathering spot but your facility is not fully accessible to those with physical disabilities; you need to stabilize your operating funds but your board is reticent to go out for a public vote; you want to be part of town-wide discussions about community resilience but feel the library is never "invited to the table," and even if you were, you don't have the capacity to attend more meetings, etc.)*
      - **What are some of the things that need to happen to create that kind of change?** *(We are looking for specific/tactical answers that provide steps to bridge the gap analysis done in the question above. For example – you recognize that staff training in a specific area like digital literacy or equity, diversity and inclusion (EDI) will be necessary to achieve your vision; you need to adopt programming strategies that focus on early literacy; you plan to undergo a construction/renovation project to make the facility fully accessible to those with physical*

disabilities; you need to engage in long-term financial planning to methodically improve salaries to retain professional staff or to build capacity; you need to focus on making connections in the community so the library is "at the table" for important conversations about the future of the community, etc. Or, answers could be targeted towards different levels of collaboration, with thoughts on how to work in collaboration with libraries in their nearby geography, county, or through the system and beyond to affect change)