

## **Library Advocacy!**

First, thank you for your advocacy on behalf of libraries and library systems!

It's hard to overstate the benefits of talking up system services such as resource sharing and the equality of access resource sharing provides Mid-Hudson residents; or the economies of scale that we leverage that leads to cost savings for our member libraries; or the importance of trustee and member library education.

## **Your Efforts!**

A number of you have been attending member library board of trustees' meetings in an effort to encourage greater advocacy. I know Jean Ehnebuske, Peter Hoffman and Pat Miller have, and I am sure there are others of you who have as well. I had the pleasure of joining Jean and Pat at some of these visits, including the board meetings at Patterson Library, Reed-Memorial and Kent Public Library.

Some of you travelled to Albany for Library Advocacy Day, including Jean Ehnebuske, Martin Miller, Michael Minor and Jim Tuttle. (I believe Martin even traveled to Washington D.C. in support of federal funding for libraries!)

I know a number of you have also met and talked with state representatives. I joined Jean Ehnebuske and Pat Miller on one of these visits when we met with Senator Greg Ball in Brewster in February. I met six of our local legislators at the "meet and greet" breakfast in Albany on March 1.

Over 60 trustees, directors, staff and friends--representing twenty of our member libraries--were present in Albany as well on March 1!

## **Efforts by Mid-Hudson Staff!**

Rebekkah Smith Aldrich and Merribeth Advocate have been strengthening the advocacy efforts of member library trustees, directors and front-line staff in a series of sessions throughout the Mid-Hudson region. A "thank you" and "job well done" is due both, especially Rebekkah who helped lead all our advocacy efforts, including organizing our visits to representatives in the region and Albany.

Our Marketing & Program Assistant, Kerstin Cruger, also made the trip to Albany and helped provide logistical support.

## **Efforts Still Needed!**

As our state representatives meet in conference and prepare to vote on the Governor's budget, it's still important for us to continue our advocacy. Let's hope our advocacy efforts result in no further cuts!

Write a "letter to the editor." Write, email, or call your representative.

- The Governor's proposed 10% cut in 2011 reduces state funding to 1994 levels!
- State funding for libraries went without any increase from 1998 to 2006, a period in which the state's budget was well under way to doubling!
- The increases since 2006 have been totally wiped out by the cuts of 18% in the last two years!
- An additional 10% cut in state funding to libraries is unfair and disproportionate to the other cuts, such as 7.3% cut in school aid and 2% cut in municipal aid.
- Library systems have been models of resource sharing and efficiency for fifty years and are examples of how other state services should be organized to realize economies of scale, reduce taxes and improve services. Library systems should be rewarded, not cut!



"As our state representatives meet in conference and prepare to vote on the Governor's budget, it's still important for us to continue our advocacy!"

## **Staff Reductions**

On January 24 and 25, I implemented the staff reduction and layoff plan approved by the Board at its January 11th meeting. The plan eliminated four full-time positions and downsized two full-time positions to part-time.

The plan addressed substantial cuts in Mid-Hudson's state funding--nearly 18% since 2008 and another 10% anticipated in 2011--to prepare for a balanced budget in 2012. Mid-Hudson has pledged to balance its budget by 2012 in exchange for an increase in member fees.

## **Final Executive Committee Approval**

I met with our attorney John Donoghue on January 19 and, on his advice, arranged for the Board's Executive Committee to meet to review and approve the final plans for the layoffs. Because the Board's expectation was to execute the layoffs in January, I arranged for the committee to meet by phone conference on January 21. The letters of notice, settlement agreements and releases, and a severance schedule based on years of service were prepared, reviewed and approved. A draft of the minutes are included in the current Board packet.



"A total of 66 years-of-service were provided by staff laid off in January to Mid-Hudson and its member libraries."

## **Affected Staff**

The plan eliminated the positions of Shipping & Receiving Clerk/Facilities Assistant, Director of Computer Operations, Outreach and Education Assistant, and Youth Services & Community Connections Coordinator. The plan also called for the positions Receptionist/Bookkeeper and Executive Assistant to be reduced from full-time to part-time.

The staff affected by this plan were Robert Beeble, Christina Ryan-Linder, Lena Smolon and Mohamed Toufali. Peggy Winn and Doris Formby were in the positions to be downsized.

A total of 66 years of service were provided by these staff to Mid-Hudson and its member libraries.

## **Settlement Agreements and Releases**

Because our agreement with CSEA requires us to give CSEA and its members a 30 calendar-day notice of any layoffs, CSEA members affected by the layoffs were placed on an immediate 30 calendar-day paid leave. It would have been unfair to have staff continue to work until their positions were eliminated or downsized.

In keeping with Board practice to extend CSEA agreements to staff otherwise excluded from joining CSEA, affected staff who were not CSEA members were also placed on paid leave as well.

Settlement agreements and releases, drafted and approved by our attorneys, were provided to all affected staff at the time of notice. A provision is included that the agreements remain confidential to the extent permitted by law.

The settlement agreements and releases have since been signed, notarized and returned by all affected staff.

## **Personnel & Staff Reorganization**

A reorganization of staff has begun and a new organizational chart will be shared with the Board at its meeting.

The Computer Services Department is being integrated into the Automation Department under the leadership of Laurie Shedrick. Services, procedures and job descriptions are being reviewed and the integration is proceeding in an orderly fashion.

Doris Formby has decided not to return and take the part-time Receptionist/Bookkeeper position. Because of the continuing uncertainties of state funding, I have decided not to fill the position at this time.

Peggy Winn, however, has decided to return and accept the part-time position of Executive Assistant, albeit with slightly different responsibilities. She begins work on Tuesday, March 8, and will be at the Board meeting.

Sean McLaughlin, a part-time Materials Handler in Shipping and Delivery, resigned as of February 28, 2011. Under our CSEA agreement, a call-back was initiated, but the former staff who had been laid off in January and worked in the department was unable to accept the position. Tom Finnigan advertised for the position on Craigslist and has hired Ostap Vegan.

Other reorganization actions and considerations include relocating third-floor staff to the second floor, weekly heads of department meetings and full-staff meetings on a monthly basis.

My gut tells me that at present, we're at a staffing level that will make it very difficult to meet members' needs. But I believe we'll need to wait and see what the state does before filling the part-time position of Receptionist/Bookkeeper.



"A reorganization of staff has begun and I will have a new organizational chart to share with the Board at its meeting."

## **2010 Financial Reports**

The December 2010 financial report is included in the Board packet.

We finally received our state aid figures for 2010 from the Division of Library Development (DLD) on February 23. Figures for supplemental aid followed on February 28.

We were pleased to learn about the 2010 supplemental funding and that it is also included in the Governor's budget for 2011. Additionally, we learned that this will be "annualized," which is reason to be guardedly optimistic about state funding.

Distribution of all remaining 2010 funding is expected no later than March 31.

Because we expect to receive supplemental aid, we will end the year in a healthier position than expected. Even though our year-end position looks positive, there is continuing uncertainty in state funding, staffing is very tight, and there are significant capital costs ahead, including a new roof for the auditorium.

I have a growing appreciation of the challenges Linda Vittone faces, not least of which are the calculations needed to translate the aid figures we receive from DLD into the dollars we can expect, and the complexities of fund-based management that has one foot in a modified cash basis of accounting and one foot in accrual-based accounting.

We report to the Division of Library Development on a modified cash-basis and we report to the State Comptroller on an accrual basis. It couldn't be more confusing! We did, of course, meet our reporting deadline of March 1 with DLD, but we requested and received a 60-day extension for our report to the Comptroller.

There is considerable complaining by library systems directors across the state about having to report to both DLD and the State Comptroller.

## **2011 Preliminary Budget**

There are two financial reports included in the Board packet that include the fiscal years 2009 and 2010 as well as the preliminary 2011 budget. One provides the details of the operating budget only. The other is a summary of the operating budget and the categorical aid and pass-throughs.

The 2011 Preliminary Budget includes a number assumptions.

- State funding will be reduced an additional 10%
- There will be no mid-year increases in health insurance
- The state will continue to use the 2000 census numbers and not the 2010, which are most likely higher for the Mid-Hudson region
- But the state will use the latest correctional facility censuses, which we believe are in decline, and there are no “held harmless” provisions regarding this population-based funding in the Governor’s budget
- Salaries and benefits will decline slightly from 61.5% to 58% of total operating costs
- Delivery costs will increase from 13.5% to almost 17% and we hope we are guessing correctly about the price of gasoline
- Total materials, databases and software will increase slightly to 7.5% of total costs
- Leases and contracts will remain constant at just over 6%
- Facility maintenance costs will increase from 3 to 4%
- All other costs will continue to run around 2% or less

## **2011 Salaries and Benefits**

- Total salaries and benefits are projected to decline by 4% in 2011 from \$1,190,818 in 2010 to \$1,144,036.
- These costs include two sets of one-time payments that total \$147,604, which are associated with the nearly 30% reduction of staff in January. These payments are:
  - \$58,604 for 26 weeks of unemployment for staff laid off. Payments may actually be less
  - \$89,000 in payroll costs for staff laid off, including final vacation and severance payments

### **Salaries**

- Despite the one-time vacation and severance payments for staff laid off, salaries are still projected to fall 16% from \$818,110 in 2010 to \$683,703 in 2011. However, there were no cost-of-living increases for staff in 2011, and depending on what the state does, we will want to return to this issue later this year.

### **Benefits**

- Total payments for health insurance are projected to rise 12% from \$206,552 in 2010 to \$231,988
- Staff who were affected by the layoffs in January and who retired, and who opted for coverage available to staff with 10 years of service or more, represent 11% of the total projected costs for health insurance in 2011
- Sixty-five percent of the total health insurance payments in 2011 is coverage for retired staff and 35% for current staff
- Payments to the NYS Employee Retirement System are expected to increase 38% from \$76,560 to \$105,975
- At \$2,642, the MTA Commuter Tax continues to be an unnecessary staff benefit

## **News from the Division of Library Development**

DLD hosts monthly conference calls of library system directors and good news was shared in February.

The \$14 million construction grant program is part of the Governor's budget and is expected to be funded in 2011.

Additionally, the annualizing of supplemental aid is intended to help the state's maintenance of effort under the federal LSTA (Library Services and Technology Act) program. This may have been an argument to incorporate supplemental aid in the state's annual support of library services. However, one hopes LSTA will continue to be funded! A bill was introduced in the House of Representatives to eliminate the program along with all Institute of Museum and Library Services funding, but it fortunately failed.

DLD is also encouraging discussion of cross-library system cooperation and the possible merging of services, if not systems. There is also discussion about waivers for systems in financial distress and other forms of relief. I visited with John Shaloiko at Southeastern NY Library Resources Council in New Paltz and Robert Hubsher at Ramapo-Catskill Library System RCLS in Middletown to discuss these and other topics.

## **Plan of Service Progress Report**

The 2010 plan of service progress report is included in the Board packet and will need to be approved by the Board. Needless to say, Merribeth Advocate deserves full credit for the completion of the report and the report reflects considerable industry and accomplishment by Mid-Hudson staff.


## **Resource Sharing**

My first attendance of Mid-Hudson's Resource Sharing Advisory Committee was a good introduction to collaborative governance. It's not an easy task!

The most interesting discussion, and potentially the most challenging, dealt with the issue of fairness. How does the library system determine when residents of one library service area (or unserved area) make unfair use of a neighboring library?

According to Mid-Hudson's current Free Direct Access policy, use becomes unfair when the residents of one library service area (or unserved area) represent 10% of another library's circulation or 25% of its holds.

Documenting use is obviously key and Laurie Shedrick will research the rates at which member libraries loan to the residents of other library service areas or unserved areas. An ad hoc committee has been formed to review these rates and consider the Free Direct Access policy.



"How does Mid-Hudson determine when residents of one library service area (or unserved area) make unfair use of a neighboring library?"

The Free Direct Access policy is a part of the library system's plan of service. As a required part of our new plan of service, it needs the approval by both the Directors Association and Mid-Hudson's Board before October 1.

## **Member Library Visits**

| Employee           | Library                     | Date        | Topic                           | Subject             | Time Spent (Minutes) |
|--------------------|-----------------------------|-------------|---------------------------------|---------------------|----------------------|
| Gerry Formby       | NorthEast-Millerton Library | 28-Jan-2011 | Support Issue / Problem Solving | Computer – Software | 240                  |
| Gerry Formby       | North Chatham Free Library  | 24-Jan-2011 | Support Issue / Problem Solving | Computer – Network  | 90                   |
| Merribeth Advocate | Ulster County Libraries     | 23-Feb-2011 | Training                        | Funding             | 150                  |

*Executive Director's March 2011 Report to Mid-Hudson's Board of Trustees*

| Employee               | Library                              | Date        | Topic           | Subject         | Time Spent (Minutes) |
|------------------------|--------------------------------------|-------------|-----------------|-----------------|----------------------|
| Merribeth Advocate     | Putnam County Libraries              | 22-Feb-2011 | Research/Advice | Planning        | 120                  |
| Merribeth Advocate     | MHLS System                          | 17-Feb-2011 | Information     | Marketing       | 120                  |
| Merribeth Advocate     | Columbia County Libraries            | 16-Feb-2011 | Research/Advice | Planning        | 120                  |
| Merribeth Advocate     | Columbia County Libraries            | 15-Feb-2011 | Training        | Funding         | 150                  |
| Merribeth Advocate     | MHLS System                          | 14-Feb-2011 | Training        | Funding         | 150                  |
| Merribeth Advocate     | Greene County Libraries              | 12-Feb-2011 | Research/Advice | Funding         | 150                  |
| Merribeth Advocate     | Dutchess County Libraries            | 11-Feb-2011 | Research/Advice | Planning        | 60                   |
| Merribeth Advocate     | Columbia County Libraries            | 10-Feb-2011 | Research/Advice | Planning        | 120                  |
| Merribeth Advocate     | Putnam County Libraries              | 25-Feb-2011 | Training        | Funding         | 150                  |
| Merribeth Advocate     | MHLS System                          | 02-Feb-2011 | Information     | Marketing       | 120                  |
| Merribeth Advocate     | MHLS System                          | 27-Jan-2011 | Training        | Funding         | 150                  |
| Merribeth Advocate     | Saugerties Public Library            | 22-Jan-2011 | Information     | Construction    | 90                   |
| Merribeth Advocate     | MHLS System                          | 20-Jan-2011 | Information     | Planning        | 120                  |
| Merribeth Advocate     | Public                               | 01-Jan-2011 | Information     | Marketing       | 60                   |
| Mike Nyerges           | LaGrange Public Library              | 19-Jan-2011 | Research/Advice | Planning        | 30                   |
| Mike Nyerges           | Patterson Library                    | 25-Jan-2011 | Trustees        | Planning        | 60                   |
| Mike Nyerges           | Poughkeepsie Public Library District | 26-Jan-2011 | Research/Advice | Planning        | 60                   |
| Mike Nyerges           | East Fishkill Public Library         | 27-Jan-2011 | Research/Advice | Planning        | 90                   |
| Mike Nyerges           | Howland Public Library               | 27-Jan-2011 | Research/Advice | Planning        | 45                   |
| Mike Nyerges           | MHLS                                 | 28-Jan-2011 | Research/Advice | Planning        | 90                   |
| Mike Nyerges           | Saugerties Public Library            | 29-Jan-2011 | Research/Advice | Planning        | 60                   |
| Mike Nyerges           | MHLS                                 | 4-Feb-2011  | Research/Advice | Planning        | 60                   |
| Mike Nyerges           | Mahopac Public Library               | 4-Feb-2011  | Research/Advice | Planning        | 90                   |
| Mike Nyerges           | Reed-Memorial Library                | 7-Feb-2011  | Trustees        | Planning        | 60                   |
| Mike Nyerges           | Poughkeepsie Public Library District | 26-Jan-2011 | Research/Advice | Planning        | 20                   |
| Mike Nyerges           | Desmond-Fish Library                 | 10-Feb-2011 | Research/Advice | Planning        | 90                   |
| Mike Nyerges           | Dutchess County Libraries            | 11-Feb-2011 | Research/Advice | Planning        | 60                   |
| Mike Nyerges           | Kent Library Board meeting           | 15-Feb-2011 | Trustees        | Planning        | 60                   |
| Mike Nyerges           | Marlboro Public Library              | 15-Feb-2011 | Research/Advice | Planning        | 60                   |
| Mike Nyerges           | Greene County Libraries              | 16-Feb-2011 | Research/Advice | Planning        | 90                   |
| Mike Nyerges           | Kingston Public Library              | 16-Feb-2011 | Research/Advice | Planning        | 60                   |
| Mike Nyerges           | Putnam County Libraries              | 22-Feb-2011 | Research/Advice | Planning        | 90                   |
| Mike Nyerges           | Ulster County Libraries              | 23-Feb-2011 | Research/Advice | Planning        | 90                   |
| Mike Nyerges           | MHLS                                 | 2-Mar-2011  | Research/Advice | Planning        | 90                   |
| Mike Nyerges           | Dutchess County Libraries            | 13-Jan-2011 | Research/Advice | Problem Solving | 60                   |
| Mike Nyerges           | MHLS                                 | 3-Feb-2011  | Research/Advice | Funding         | 60                   |
| Mike Nyerges           | MHLS                                 | 3-Feb-2011  | Research/Advice | Governance      | 90                   |
| Mike Nyerges           | MHLS                                 | 15-Feb-2011 | Research/Advice | Governance      | 120                  |
| Mike Nyerges           | MHLS                                 | 24-Feb-2011 | Research/Advice | Planning        | 60                   |
| Rebekkah Smith Aldrich | Ulster County Libraries              | 23-Feb-2011 | Information     | Planning        | 120                  |
| Rebekkah Smith Aldrich | Putnam County Libraries              | 22-Feb-2011 | Research/Advice | Planning        | 120                  |
| Rebekkah Smith Aldrich | Columbia County Libraries            | 15-Feb-2011 | Information     | Planning        | 135                  |
| Rebekkah Smith Aldrich | Greene County Libraries              | 16-Feb-2011 | Information     | Planning        | 120                  |
| Rebekkah Smith Aldrich | Dutchess County Libraries            | 11-Feb-2011 | Research/Advice | Planning        | 60                   |
| Rebekkah Smith Aldrich | Greene County Libraries              | 12-Feb-2011 | Information     | Funding         | 120                  |

*Executive Director's March 2011 Report to Mid-Hudson's Board of Trustees*

| Employee               | Library                      | Date        | Topic                           | Subject               | Time Spent (Minutes) |
|------------------------|------------------------------|-------------|---------------------------------|-----------------------|----------------------|
| Rebekkah Smith Aldrich | LaGrange Association Library | 11-Feb-2011 | Research/Advice                 | Vote Support          | 120                  |
| Rebekkah Smith Aldrich | Dutchess County Libraries    | 04-Feb-2011 | Research/Advice                 | Planning              | 120                  |
| Rebekkah Smith Aldrich | Putnam County Libraries      | 08-Feb-2011 | Research/Advice                 | Planning              | 120                  |
| Rebekkah Smith Aldrich | Catskill Public Library      | 20-Jan-2011 | Research/Advice                 | Organizational Growth | 210                  |
| Rebekkah Smith Aldrich | NorthEast-Millerton Library  | 14-Jan-2011 | Training                        | Organizational Growth | 120                  |
| Rebekkah Smith Aldrich | Millbrook Library            | 13-Jan-2011 | Support Issue / Problem Solving | Funding               | 90                   |
| Rebekkah Smith Aldrich | LaGrange Association Library | 13-Jan-2011 | Support Issue / Problem Solving | Funding               | 90                   |
| Rebekkah Smith Aldrich | Beekman Library              | 13-Jan-2011 | Support Issue / Problem Solving | Funding               | 90                   |
| Rebekkah Smith Aldrich | Chatham Public Library       | 11-Jan-2011 | Support Issue / Problem Solving | Friends               | 120                  |
| Rebekkah Smith Aldrich | Millbrook Library            | 05-Jan-2011 | Research/Advice                 | Trustees              | 10                   |
| Robert Drake           | Chatham Public Library       | 26-Jan-2011 | Support Issue / Problem Solving | Computer – Network    | 150                  |
| Robert Drake           | Athens - D.R. Evarts Library | 05-Jan-2011 | Support Issue / Problem Solving | Computer – Software   | 240                  |