Consultant Reports
MHLS Director's Association
Meeting of Wednesday, September 10, 2014

Merribeth Advocate, Assistant Director

1. **Battle of the Books Update:** 24 MHLS member libraries participated in the Regional Battle of the Books on September 6th - there will be an update at the DA meeting on the exciting day! Battle of the Books is a national Summer Reading Program for middle school students who will be in the 6th through the 9th grade in September. Participants in the Mid-Hudson Library System program are asked to read eight selected titles and then participate in trivia battles based on the books. The goal of the program is to promote a love of reading in middle school-age children, to expose them to titles and authors that they might not encounter in school and to inspire teamwork and good sportsmanship in an atmosphere of friendly competition. If your library is not yet involved, but wants to join for 2015, contact Kerstin Cruger at kcruger@midhudson.org ASAP as planning begins in October.

2. **Summer Reading Program Final Reports:** The final report form is linked to the center of the homepage at midhudson.org - reports are due from each MHLS library on September 8.

3. **Annual Public Performance Movie Site Licenses:** To show movies at the library you need a public performance license. In 2014, 7 member libraries got a discounted price on Movie Licensing USA's annual license by purchasing it through a MHLS group buy. This group buy is ongoing and you can join in any time, on a pro-rated basis.
   - If you do not currently have a license, contact me if you would like a MHLS group discount quote. Prices are based on number of active card holders.
   - If you are currently licensed with Movie Licensing USA, please note that the old special pricing was $187 for all MHLS libraries. **The new group pricing is better for libraries that serve populations of 2,500 or less.** All other currently licensed libraries paying $187 a year are already getting better pricing than they can offer now.

   Movie Licensing USA covers 95% of the major motion picture studios including and exclusive to Walt Disney Pictures, Warner Bros., Sony Pictures, NBC/Universal Pictures, New Line Cinema, Lionsgate Films, MGM, Touchstone Pictures, Hollywood Pictures, Columbia Pictures, TriStar Pictures, Summit Entertainment, Focus Features, Miramax, Warner Independent Pictures, Fine Line Features, United Artists and Picturehouse. With an annual public performance site license you can show an unlimited amount of films for any aspect of programming inside the library. Outside groups in the community can also show movies in the library with this site-based license.

4. **Continuing Education Requirement for Public Librarian Certification:** Public librarian professional certificates issued as of January 1, 2010 only remain valid when 60 hours of professional development are completed every five-year period. **The first deadline for this is January 1, 2015.** Please make sure that affected staff in your library understand that NYS will be spot-checking for compliance so they need to have their records in order. Approved programs from accepted providers include formal classes or courses, workshops, seminars, lectures, institutes, webinars, e-courses, library conference programs, or other relevant programs. Curriculum that is pre-approved by the employing library can also fulfill the professional development requirement. Certificates or transcripts showing successful completion of courses are acceptable forms of documentation, as are letters

from a supervisor indicating completion of a program or project. Full details at
http://www.nysl.nysed.gov/libdev/cert/conted.htm .

5. **Read an eBook Day:** Get ready for a celebration of eBooks on an international scale. On Thursday, September 18, library patrons will take part in the largest digital reading event to show appreciation and raise awareness for eBooks. Read an eBook Day is a celebration of modern storytelling. Celebrate with your fellow readers. More information at http://readanebookday.com. Graphics available in the center of the homepage at midhudson.org.

6. **2014 Annual Report - Estimating Annual Attendance:** a reminder that each library is required to submit an annual report to the state, and one of the questions is the annual number of 'Library Visits'. If annual counts are available, please report them. Otherwise, provide an annual estimate based on a count taken during "a typical week". If you have a "typical week" count, multiply the count by 52 weeks to report the annual count. A "typical week" is a week in which the library is open its regular hours, is neither unusually slow nor unusually busy, and containing no holidays/special events. It is seven consecutive calendar days, from Sunday through Saturday, or whatever days the library is open during that period. Please report all figures for the same week, if possible. **It is recommended that libraries take a count during a typical week in October.** Report the total number of persons entering the library for whatever purpose during the year. Include persons attending activities, meetings, program sessions, and those persons requiring no staff services. This is an annual attendance total.

Rebekkah Smith Aldrich, Coordinator for Library Sustainability

1. **Albany Update**
   a. **Tax Cap Information now available:**
      i. The NYS Office of the State Comptroller has issued the **Inflation and Allowable Levy Growth Factors as related to the tax cap for fiscal years beginning in 2015: 1.56%**
      ii. **All libraries with a public vote on their budget, including any library that has *ever* had a 414 vote**, are required to file the online Tax Cap form. The form must be filed "prior to the adoption of the budget."
      iii. A reminder that 414 libraries have their "own" cap calculation, it is not part of the town's calculation and you **are required to file your own** OSC form.
      iv. "Available Carryover" A reminder that if your library did not increase its budget by the full cap amount or not at all (example: if a 414 library did not go out last year and is going out this year and is successful) you are entitled to the **"available carryover"** addition to your cap amount. This is the amount by which the tax levy for the prior fiscal year was below the allowable tax levy limit for that year (before any exclusions), **up to 1.5%.**
      v. For more information and answers to frequently asked questions please go to https://www.osc.state.ny.us/localgov/realprop/localgovernments.htm
      vi. If you cannot find your log-in information please call 518.473.0006.

   b. **Vote Procedures:** In the opinion from the NYS Board of Election (obtained by the New York Library Association and available here:

http://www.nyla.org/images/nyla/files/ADVOC_HAVA%20Law%20Impact%20on%20Library%20Electio ns_712.pdf) libraries can continue to use paper ballots or opt to use paper ballots instead of optical voting machines. However, **for libraries whose school district holds their election**: The Governor signed into law (Chapter Law 273) an extension of the law that allows for the use of voting machines/methods other than the optical scan machines (read: paper ballots) in votes **through December 15, 2015**.

c. **Nonprofit Revitalization Act:** As reported last month, the NYS Division of Library Development issued criteria for all libraries as to what must be included in your conflict of interest and whistleblower protection policies. As posted to the MHLS Directors list, the New York Library Association has provided model policies for you. These models are also posted on our web site at http://midhudson.org/department/member_information/library_policies.htm AT this time these policies are the only portions of the Nonprofit Revitalization Act that the State Education Department's Office of Counsel has ruled applies to libraries. HOWEVER, I'd like to bring your attention to the fact that any library that has a Friends Group that is separately incorporated from the library that this law will apply IN FULL to that Friends Group.

   i. **This means your Friends Group needs to adopt the Conflict of Interest policy just as your library does.** We will discuss this at the next regularly scheduled meeting of the MHLS Friends Support Group.

   ii. An initial review of the law indicates few other changes of note to library Friends Groups. I will point out that Friends Groups that bring in $100,000-$250,000 are required to have an **independent CPA review**, those earning more than that need a full audit by an independent CPA. Those bringing in more than $1 million have further requirements to meet. While most libraries will think this may never apply to them, do keep it in mind during, perhaps, a capital campaign if the Friends were the conduit for significant fundraising. I have asked for NYLA to review my work on this interpretation to see if I've missed anything. I'll keep you posted if they provide additional findings for Friends Groups.

d. **"Libraries Are Education":** On August 27th I participated as a member of the NYLA Legislative Committee where work has begun in earnest to influence the outcome of library aid in the 2015 State Budget. The mantra for the coming year will be to match library aid increases with the increases to school aid. If this pattern were achieved, we would reach current formula funding in approximately 3 years. NYLA will continue to pursue exemption for public libraries from the MTA tax.

2. **Civil Service 101 for Trustees**: In light of a number of problems with procedures used in the hiring of library directors throughout the System we will be making a concerted effort to better educate trustees of libraries impacted by NYS Civil Service. In addition to the continued promotion of this within the curriculum of the Trustee Essentials workshop and the added emphasis on this topic from the System when we are aware of a director opening at an impacted library, I have developed an informational piece for trustees called "*Civil Service 101 for Public Library Trustees*," with the assistance of NYS Civil Service experts Geoffrey Kirkpatrick, director of the Bethlehem Public Library, incoming President of the New York Library Association and chair of the NYLA Civil Service Taskforce and his personnel administrator, Tracey McShane. I have attached the new

document to my report.

3. **Can I ask a favor?** Over the past ten years we have helped to educate over 1,000 member library trustees. We have learned that the #1 trustees learn about our workshops is from their library director. Please help encourage your trustees' attendance at the upcoming **Essential Trustee Duties & Responsibilities workshops**. There are four currently scheduled:

   - **Saturday, September 13,** 10:15am – 12:30pm at Kingston Library (*55 Franklin St., Kingston 12401)*
   - **Thursday, September 18,** 5:30 – 8:00pm at Roeliff Jansen Community Library (*9091 Route 22, Hillsdale 12529)*
   - **Tuesday, September 23,** 10:15am – 12:30pm at Cairo Public Library (*15 Railroad Ave, Cairo 12413)*
   - **Wednesday, September 24,** 5:30 – 8:00pm at Mid-Hudson Library System Auditorium (*105 Market St., Poughkeepsie 12601)*

4. **Libraries that have applied for construction grants:** A review of your applications took place on August 28th by the MHLS Incentives Committee. Award recommendations will be provided to the full MHLS board at their September 17th meeting. You will be notified individually at that point about whether or not your project is being recommended for funding and asked to sign-off on moving your application forward in the process.

5. **National Friends of Libraries Week is coming up October 19-25** which provides a great opportunity to **publicly thank your Friends**. Some libraries do letters to the editor of their local paper to acknowledge the good work of their Friends, others post to Facebook, others hold events to say thanks, library boards can take the opportunity to thank Friends boards… you get the picture! Saying thank you, in large and small ways, goes a long way!

6. **MHLS Leadership Circle** Starts Next Month: After next month's DA meeting (October 7) we will hold our first instance of the "MHLS Leadership Circle." This is a new workshop, **for directors only**, to discuss the challenges and opportunities of being a library leader. In this first meeting we will be focused on recognizing the difference between leadership and management and how to be an effective leader, in general as it relates to your staff, your board and the community that you serve.

Robert Drake, Technology Operations Manager

Technology Operations Overview

1. **Training Catalog:** We are currently preparing a catalog of proposed trainings for 2015. If anyone has a particular request we are considering these at this time. Please send along any ideas or recommendations as soon as possible.

2. **Annual Report Data posted:** On or before 9/10, annual report data will be posted at:
   http://midhudson.org/annual_reports/2013/

3. **Ticket System Usage:** Over 90% of support requests are coming in to either techsupport@midhudson.org or to cataloging@midhudson.org as opposed to personal emails. Thank you for your continued support of our operations.

IT/Technology

4. ***Encore Usage***

	July 2013	July 2014	August
# of Member Libraries Implementing Encore	0	59	60
# of Legacy System Searches	62,660	30,440	
# of Encore Searches	0	45,900	
# of OverDrive Checkouts via Encore	0	394	

Table 2 on database stats – Pre and Post Encore

Gale General One File	2013				2014			
	Sessions [1]	Full Text Retrievals [2]	Retrievals [3]	Searches [4]	Sessions	Full Text Retrievals	Retrievals	Searches
June	175	327	599	858	227	365	548	606
July	187	257	484	835	206	453	696	757
Gale Academic One File	2013				2014			
	Sessions	Full Text Retrievals	Retrievals	Searches	Sessions	Full Text Retrievals	Retrievals	Searches
June	26	19	45	85	136	171	323	140
July	18	47	68	129	72	67	150	107

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[1] Cycle of user activities that starts when a user connects to a database and ends by connecting to another database or leaving the service through a logout or timeout due to user inactivity.

[2] Sum of only full text records examined, downloaded, or otherwise supplied to user.

[3] Sum of all full text, abstract, and extended citation records examined, downloaded, or otherwise supplied to user.

[4] A specific intellectual query submitted through a search form to the database.

Based on this level of exposure and the number of visitors to the site, most or all patrons have seen the interface. It is highly recommended that remaining libraries link to search.midhudsonlibraries.org as soon as possible.

5. **Encore OPACs:** Reminder, if you have not already you may want to consider linking your OPAC's to Encore as well. Note that recent searches have been disabled within Encore, minimizing that privacy issue in regards to these computers. If you have difficulty with these machines, techsupport@midhudson.org may be able to assist.

Sierra/ILS

6. **Sierra Slowness:** As of 8/29, iii has identified an issue that is causing high load on the Sierra database specifically Saturday mornings. The ultimate cause of this issue has not yet been determined, however the Directors of both the Hosted Service and Customer Support teams have dedicated staff to watching our server in the hopes of finding the source of the issue for resolution. With their support, we're hoping to minimize disruption, especially Saturday mornings, until the issue is more permanently resolved.

   Unfortunately, as of this writing, no additional detail is known, however we've had daily calls with the iii director's and are hopeful we will have more definitive answers prior to the DA meeting.

   Regarding reporting, while we monitor the Listserv as best as possible, tickets better allow us to identify the scope of an issue and respond with specific details as necessary. Internally, we are working to improve our weekend reporting in regards to Sierra issues.

7. **Business Insights Essentials:** Beginning September 11th, Business Insights Essentials will be included with our Ebsco Search results. A known bug exists in regards to 'accessibility audio' and certain other audio features, however these features can still be used when accessing this database outside of Encore, and represent a small subset of overall usage.

Cataloguing

8. **Cataloguing Support Requests:** When sending multiple requests or questions to cataloging in a day, if possible, please try to combine your items into a single email. The cataloguing department collectively receives between 100-200 emails a day – digested requests decrease the amount of time staff spend switching between tasks and improve our ability to process this workload.

9. **When sending copies of items to cataloguing:** For libraries that send us copies of the items they'd like us to catalog, it's sometimes difficult to find an appropriate record if all we receive is a copy of the cover. When possible please include numbers like ISBN or UPC, or copies of the front and back title page in addition to the cover.

Civil Service 101 for Public Library Trustees

Three of the four types of libraries fall under New York State Civil Service:

- Municipal Public Libraries
- School District Public Libraries
- Special District Public Libraries

Association libraries do not fall under Civil Service Law unless it is explicitly stated in the library's charter.

[Source: New York State Division of Library Development, Types of Libraries: A Comparison, http://www.nysl.nysed.gov/libdev/libs/pltypes.htm]

What is Civil Service?

Civil Service governs the hiring, promotion and firing of employees. Under New York State Civil Service Law, "appointments and promotions… shall be made according to merit and fitness to be ascertained, as far as practicable, by examination which, as far as practicable, shall be competitive…"

What is the point of Civil Service?

- Protect incumbents from political pressure.
- Test for merit and fitness in an objective way.
- Encourage promotion from within.
- Provide career ladders for employees.

Who administers Civil Service?

Civil Service is administered by "commissions" that are geographically located throughout New York State. Each commission has authority over those practices of institutions within its service area. The commissions are commonly county based, in larger cities there may be a Civil Service Commission specific to that city.

If the board is hiring a new library director, do Civil Service practices need to be followed?

Yes.

How is a new director appointed?

Boards will need to reach out to their local Civil Service commission to discuss the process. This position will fall into the competitive class. Your process will likely follow the following pattern:

- Candidates must meet the minimum qualifications for the position.
- Candidates must receive a passing score and be reachable* on an eligible list. (*See "Rule of Three" below)
- Candidates that are reachable must respond positively to a canvass letter
- The board must select a new director from the pool of available candidates identified through the canvassing process. The board should use an interview process and use any legal selection criteria amongst those deemed eligible to make their selection.
- Once a selection has been made, the candidate of choice must be appointed "from the list."
- The person selected must complete a probationary period. The length of this probationary period is determined by the local Civil Service commission.

Can we appoint an interim director while conducting a search for a new director?

Yes, it is possible for an interim director to be named through the temporary hire option. Please contact your local Civil Service Commission for their temporary hire process.

Is there a residency requirement for candidates to be eligible?

Possibly. You will need to check with your local Civil Service commission.

What is the "Rule of Three"?

This is actually referred to as the "Rule of One of Three," means that you may choose to appoint any one of the three highest scoring eligible people, including ties, that are willing to accept the appointment.

What do we do if there is no eligible list to hire a new director from?

Your first step would be to contact your local Civil Service commission to find out when the next test will be offered to gauge the timeframe for your process.

- **If a test will be offered within an acceptable time span to meet your needs**, advertise the test opportunity along with your job opening to encourage candidates to become eligible.

- **If a test will not be offered within an acceptable time span** you can provisionally appoint a candidate of your choice with the understanding that once the test is offered this person will need to take the test and score high enough to be reachable to keep their job.

What questions are asked on the exam for library directors?

The exam for directors is not a traditional "exam" as you may envision it. It is called a "training and experience" exam, or "T&E" exam, and is basically a form that asks questions about a candidate's education and experience relevant to the job specifications.

What job protections are offered to employees under Civil Service Law in New York?

Section 75 of the Civil Service Law provides due process in removal and other disciplinary actions to every post-probationary permanent employee. Due process will include a hearing at which the employee must be proved guilty of misconduct or incompetence. Library collective bargaining agreements may modify these procedures.

For more information see "*A Librarian's Guide to Civil Service in New York State*," a publication of the New York Library Association's Leadership & Management Section (LAMS): http://bit.ly/YWbxV0