

Consultant Reports
MHLS Directors Association
Meeting of Friday, May 5, 2017

Merribeth Advocate, Assistant Director

Administration

1. Corrections Needed to 2016 Member Library Annual Reports

- a. 58 of the 66 member library 2016 annual reports have been returned by DLD to MHLS to facilitate corrections. Each of the 58 libraries is receiving an email from me noting the specific areas corrections are needed. A reminder that after making the corrections to save a copy of your revised 2016 annual report, and resubmit it so that the state can continue their review. The most common errors reported are related to discrepancies in the number of trustees and terms as compared to the library charter, and large differences in one-on-one programming between the number of sessions and attendances.

Digital Collection Access

2. OverDrive eBooks & eAudio

- a. **Recommend to Library Function:** A reminder that the built-in OverDrive 'Recommend to Library' has been live since April 3rd, so that individual libraries would be able to get recommendations from their patrons of OverDrive titles that would like the library to purchase. Since then, over 1,000 patron recommendations have come through. At this point, patrons are each limited to 4 recommendations per month.
 - i. **How to know what your patrons are recommending:** In OverDrive Marketplace, select the Insights tab, then Reports, and select the Recommendations report. In Report Options click on your library name to select it. *If you want to view more than one library at the same time (for instance if you have a branch or if you want to see the results for all libraries in your county), click on the libraries you want to select.*
- b. **Monthly Statistics:** Each month MHLS generated OverDrive usage statistics by library are posted on midhudson.org under Topics (or get there directly at <http://midhudson.org/topics/statistics-research/overdrive-usage-statisticsby-library>). There you will also see directions for some of the many reports you can run including the report on 'titles that patrons from your library are currently on the waiting list for'. This report can also be run by county.
- c. Please contact me if you would like to get an OverDrive account set up for your library, or to be reminded of your OverDrive login.

3. Zinio eMagazines

- a. **Monthly Statistics:** Each month MHLS generated usage statistics, which are collected by library patron barcode range, are posted on midhudson.org under Topics (or get there directly at <http://midhudson.org/topics/statistics-research/zino-usage-statistics-by-library> .) If you would like more access to the statistics (to see eMagazines your patrons have checked out in a specific time period, or who are the new patrons from your library who have registered with Zinio in a specific time period) contact me to schedule a 20 minute phone training session on the Zinio admin interface.

Adult Literacy

4. **MHLS Adult Literacy Mini Grant Program 2017/8 – applications due June 5**

- a. Adult Literacy Library Services 2017/18 funds, received from the NYS Library Division of Library Development, will be used to fund mini-grants of \$1,000 each for up to 9 eligible member libraries for this initiative to help them to develop and expand adult literacy programs (which will enhance workforce development services in public libraries, improve adult literacy on the job and in the home) and increase participation of adults in library literacy programs which will improve their career and educational opportunities.
- b. Applications, Mini-Grant Information and Requirements available at <https://tinyurl.com/MHLSAdultLit17-18>
- c. Eligibility Criteria:
 - i. The library must have a new or existing partnership with a Literacy Partner Organization to be considered eligible for the funds.
 - ii. The Literacy Partner Organization must be local public schools, colleges or other organizations that are operating adult literacy programs, which is designed to initiate, enhance or extend services to adults to increase their literacy skills.
 - iii. The library must have a related infrastructure component (such as a public computing center in the library; a literacy office in the library; the library is in a designated Literacy Zone).

Coordinated Outreach

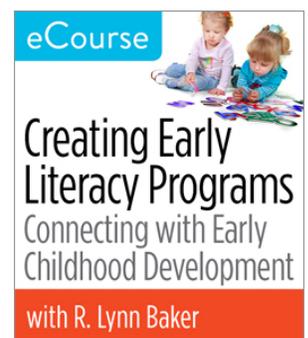
5. **MHLS Outreach Mini Grant Program 2017 – applications due August 11**

- a. NYS Outreach Categorical Aid funds, received from the NYS Library Division of Library Development, will be used to fund mini-grants of up to \$2,000 per member library to develop programs and services to attract and connect to outreach target populations and form relevant community partnerships at the local level.
 - i. Outreach target populations [as defined in Education Law §273 (1) (h) (1)] are those who are educationally disadvantaged, members of ethnic or minority groups in need of special library services, unemployed, blind, physically disabled, have developmental or learning disabilities, or who are aged or confined in institutions.
- b. Applications, Mini-Grant Information and Requirements available at <https://tinyurl.com/MHLSOutreach-2017>

Early Literacy

6. **Reimbursement of ALA eCourse ‘Creating Early Literacy Programs: Connecting with Early Childhood Development’ – eCourse begins June 5**

- a. In support of MHLS Early Literacy efforts, which focus on offering training in support of making member libraries vital community partners and early learning hubs in their community, here is a professional development opportunity that will be fully funded from Family Literacy Library Services 2017/18 Funds to MHLS.
- b. ALA is offering ‘**Creating Early Literacy Programs: Connecting with Early Childhood Development**’ as an asynchronous eCourse beginning June 5, 2017 and continuing for 4 weeks. MHLS will **reimburse the library the full \$175**



registration fee (based on my receipt of the form at <https://tinyurl.com/MHLSearlylitPD2017> and a copy of the participant's Certificate of Completion from ALA by July 14, 2017).

- c. For a complete course description and to register go to <https://www.alastore.ala.org/detail.aspx?ID=11771>. Registration is now open.

Professional Development & Training

7. **Web Literacy Training coming to MHLS Auditorium - June 13:** Information and registration at <http://www.senylrc.org/WebLiteracyTraining>

Rebekkah Smith Aldrich, Coordinator for Library Sustainability

Awareness & Advocacy

1. Federal Funding Threatened; #SaveIMLS

- a. President Trump has proposed completely cutting federal funds for the Library Service & Technology Act and the Institute of Museum & Library Services.
- b. For a breakdown of what this means for the library infrastructure in New York State please read this briefing provided by the New York Library Association: <http://bit.ly/2pQ9Vtp>
- c. **ACTION ITEM:** Please plan to participate in National Library Legislative Day either in person in Washington DC or online through the ALA Washington Office's Virtual National Library Legislative Day: <http://bit.ly/2mlshuu>

2. State Budget Finalized

- a. **Aid Restored; Construction Aid Increased**
 - i. **The Library Aid program will be funded at \$95.6 million** reflecting a **restoration** of Governor Cuomo's proposed cut. While this is flat funding over last year, our efforts staved off a reduction.
 - ii. **Library Construction Aid has been increased to \$24 million.** This not only reverses the Governor's proposed cut of \$5 million, it also increases the Aid program by **\$5 million above where we were last year!**
- b. **Bullet Aid:** There is also word that there will be **\$15 million in Senate "Bullet Aid" for Special Legislative Grants for education institutions, including public libraries.** While this is less than last year, it is still a viable source of funds for your library. NYLA will have a sample letter you can use to request funds through your State Senator soon.
- c. **ACTION ITEM: Thank You Campaign:** NYLA makes it easy for you to thank your local legislators for their support of libraries in this year's budget negotiations – just [CLICK HERE](#) to access NYLA's Online Advocacy Center! In less than 15 seconds, you can send a message of appreciation with our pre-loaded

thank you letter, or edit the letter to send your own personal message of thanks.

3. **County Funding Advocacy:** The MHLS County Funding Advocacy Group met in April and updated “The State of County Funding in the MHLS Region” document to enable all libraries to a) understand how county funds flow to libraries in each county and b) update county-level advocacy techniques that are working.
 - a. **ATTACHED:** This report is included in this month’s DA packet.
 - b. The New York Library Association has offered to create county-based custom online advocacy campaigns through their Online Advocacy Center for the counties in the Mid-Hudson Library System. Please contact me if you would like to make that happen for your county.

4. **MHLS Real People. Real Dollars. Campaign:** You may have seen an article about the campaign featured in the latest issue of the NYLA eBulletin: <http://bit.ly/2q6OSD7> There is talk of this campaign going statewide in 2018. If your library participated in this campaign feedback would be very welcome, we want to ensure it is the best it can be for all involved. Please send feedback to Kerstin Cruger, MHLS Marketing & Program Assistant: kcruger@midhudson.org

Consulting & Development Services

5. **Charter Amendments:** Your library’s charter is where you will find the legal citation of how many trustees your library should have. This document “trumps” your library’s bylaws for the answer to that question. Libraries that discovered through the annual report to the state reporting process that these numbers do not match may need to seek a charter amendment through the Board of Regents. Please contact me if this is the case and I will help you get the ball rolling in Albany through the NYS Division of Library Development to bring those two documents into alignment.

6. **If your library is planning a 259 or 414 vote this year** please let me know via email: rsmith@midhudson.org So far I have:
 - a. Beekman Library (414)
 - b. Clinton Community Library (414)
 - c. Hudson Area Association Library (414)
 - d. Red Hook Public Library (259)

7. **From the NYLA Sustainability Initiative**
 - a. All NY libraries are now able to **become certified as a “Green Business”** thanks to a partnership with the Westchester Green Business Council. This is a smart way to assess your library’s operations and make smart choices. Discounted rate for libraries is good through 2017: <http://climatechange.westchestergov.com/join-westchester-green-business/about> To learn more about one library’s story of their positive experience with this program: <http://bit.ly/2mUBLCY> This will be the first phase towards becoming certified as a “Sustainable Library” by the New York Library Association.

 - b. **What is your library planning to do for the “Building a Better World” Summer Reading Program theme that will empower children, teens and adults to create a better world in your community?** The NYLA Sustainability Initiative wants to know: <http://bit.ly/2oHWueF>

Construction

8. State Aid for Public Library Construction Program

- a. **Construction Needs & Intent to Apply Action Memo** was sent via the MHLS-ALERTS list on April 13th. This memo is due May 19, 2017. This is a memo that *all directors* are expected to fill out. Why?
 1. This information helps to identify the statewide need for construction aid to help with advocacy efforts for the State Aid for Public Library Construction Program
 2. This is the **mandatory first step to apply** for the next round of funds available through the State Aid for Public Library Construction Program.
- b. **Archived Recordings of Recent MHLS Webinars:**
 - i. Creating a Basic Facility Plan: [Drafting a Basic Facility Plan](#) [3.21.17] [Presentation Slides](#) [PDF] |
 1. **NEW RESOURCE:** [Basic Facility Plan Outline](#) [MS Word]
 - ii. [Introduction to the State Aid for Public Library Construction Grant Program](#) [4.4.17] [Presentation Slides](#) [PDF]

Professional Development & Training

9. **Upcoming Workshops.** For more information: <http://calendar.midhudson.org>
 - a. Leadership Circle with Evelyn Neale – Two-part series on Change Management
 - i. Part 1 – May 5: Managing Known Change – Creating a Change Plan
 - ii. Part 2 – October 3: Managing Unknown Change
 - b. Sustainable Facilities: An Introduction [Webinar] May 9 @10:00
 - c. Roundtable for New Directors, September 6 after the DA meeting

Thomas O'Connell, Acting Technology Operations Manager

Technology Operations Overview

1. Ticket System for All Requests, and KnowledgeBase for Sierra Guides and Reports

- a. Hello everyone, just a reminder that all Sierra, website, tech everything queries should go to techsupport@midhudson.org . This goes into our ticket system which is directly accessed by five different staff people including Gerry Formby and myself. Unlike our individual emails, multiple people are tracking whether or not tickets are resolved in timely fashion.
- b. Questions regarding orders, brief records, and other cataloguing issues should be sent to cataloging@midhudson.org .
- c. In an effort to keep our Sierra database as current (and secure) as possible, please be sure to contact us, techsupport@midhudson.org , when you have changes in staffing.
If you have new staff who need a login, someone who has taken on new responsibilities and needs additional permissions, or a staff member who is no longer working at the library, we are happy to update your logins to make sure they remain accurate.

2. Sierra Questions Webinars

- a. Something special for May's Lunchtime Webinar, it will be hosted by MHLS Cataloguer Courtney Wimmers. On May 24th at noon, Courtney will present Level Up: Gaming in Your Library. This presentation will discuss popular games that may not be on your radar and how to start programs related to those games at your library. The session will take place via a GotoMeeting session and last about 45 minutes. There is a 15 person attendance limit, so register through the MHLS calendar at <http://mid-hudson.evanced.info/signup/calendar> if you would like to attend.
- b. If you have ideas about topics you would like to see covered in potential future sessions, please contact Thomas at toconnell@midhudson.org or call him at (845) 471-6060, ext. 221. This session is open to all member library staff members!

3. Sierra Upgrade

- a. On Monday May 29th, we will upgrade to the latest version of Sierra, 3.1. While we are usually cautious about moving forward to a recent release of software, we need to be on this version to comply with security changes taking place for eCommerce. Innovative assures me that this software has been through extensive testing and there have been no major issues reported.

One thing to be aware of, Sierra version 3.1 moves from Java 6 to Java 8. This is a good thing, but there is a slight chance that you may need to reinstall Sierra after the upgrade. I recommend that you have the Sierra installation instructions printed out and handy just in case.

4. E-Rate: E-rate has extended filing deadlines this year

- a. Filing Deadline for Form 470 – has already passes, the deadline was April 13th
- b. Filing Deadline Form 471 – still a few days to away May 11th

E-Rate Program Deadlines can be found on USAC's page: <https://usac.org/sl/tools/deadlines/default.aspx>

E-rate Program Application

Flowchart: <http://www.usac.org/res/documents/sl/pdf/handouts/application-process-flow-chart.pdf>

Recommended e-rate consultant:

John Rossi

TeleTech Associates, Inc.
PO Box 637
Rhinebeck, NY 12572-0637
www.teletechassociates.com
[516-868-5600](tel:516-868-5600) office / [516-908-7703](tel:516-908-7703) fax

The State of County Funding in the MHLS Region | 2017

County	Amount Received (2017)	How this compares:	What fund are used for	Timing/Key Players
Columbia County (11 libraries)	\$67,700	2016: 67,700 2015: \$57,000 2009: \$65,000; 5% down over each of the past two years	<p>2017: \$4,000 to each library in the county; \$58,700 divided among libraries using the MHLS Assessment formula; \$5,000 to purchase materials (digital; PR materials; giveaways) that will be accessible to all county residents</p> <p>2016: \$62,700 divided evenly amongst libraries; \$5,000 to purchase digital materials that will be accessible to all county residents</p> <p>2015: Divided evenly amongst libraries; to be used at their discretion</p>	<p>Decision Makers: Board of Supervisors</p> <p>Influencers: Governance Committee oversees library aid from the county; town supervisors</p> <p>Timing: Year round outreach with town supervisors; Presentation to committee in July/August; Decision made in the last quarter of the year. Libraries have decided to advocate for an increase every other year and are considering “non-monetary” asks in the off years.</p> <p>Conduit: Columbia County Library Association (becoming more active); Columbia County Directors meetings (ad hoc)</p>

County	Amount Received (2017)	How this compares:	What fund are used for	Timing/Key Players
Dutchess County (22 libraries)	\$20,000/year for 2 years	2016: \$0 2015: \$0 2014: \$30,000 2009: \$249,893	<p>2017: Grant from the Dutchess County Department of Community & Family Services “Our focus is on patrons with special needs, and the grant will pay for someone to visit Dutchess County libraries & evaluate their appropriateness for patrons with special needs. It will also support a survey of national programs in order to choose one or a few to implement within our libraries, and staff will be trained to implement these programs. The goal is to have two pilot programs in two libraries this year as a model.”</p> <p>2014: Now comes in the form of a competitive grant with double the number of agencies competing for less funds Specific grant project: Teen Geeks. Majority of libraries participate but not all.</p>	<p>Decision Makers: Grant making agency</p> <p>Timing: The application was due in the 4th quarter of 2016, and the funding is calendar year.</p> <p>Influencers: County Executive; Planning and Development Commissioner (Eoin Wrafter); Community Development Advisory Committee; county legislators</p> <p>Conduit: Dutchess County Directors meetings (ad hoc with bylaws); PPLD serves as pass through</p>

County	Amount Received (2017)	How this compares:	What fund are used for	Timing/Key Players
Greene County (8 libraries)	\$32,700	<p>2016: \$32,700</p> <p>2015-2010: \$32,700</p> <p>2009: \$39,000</p>	<p>2017:</p> <ul style="list-style-type: none"> - \$20,500: Greene County Resident Support divided equally among libraries - \$3,800: Technical Training / Support divided equally - \$3,000: Online Databases - \$3,200: Downloadable eBooks & Audiobooks - \$1,100: GCLA Outreach - \$600: Book Page Subscription - \$500: Preparation of Annual Tax Report <p>2016:</p> <ul style="list-style-type: none"> - Pays Greene County share of MHLS database and ebook charges - \$2,000 per library for discretionary spending - Pays tech support for libraries. Reimbursed upon request <p>2015: (same as above)</p>	<p>Decision Makers: County Administrator (hired by the legislator) & County Legislature</p> <p>Influencers: Education Committee oversees funding</p> <p>Timing: Written budget request due in early August; Annual Report due April 1; Presentation to the legislature in May</p> <p>Conduit: Greene County Library Association</p>

County	Amount Received (2017)	How this compares:	What fund are used for	Timing/Key Players
Putnam County (8 libraries)	\$435,707	2016: \$435, 707 2015: \$400,000 2009: \$368,116;	2017: -\$380,907: General -\$27,540: Software, ebooks, Online Resources, Homework Help -\$11,300: Reference Center -\$9,460: Literacy Volunteers of Putnam County -\$5,000: Telecommunications -\$1,500: Local History 2016: \$380,907 divided proportionally based on population among libraries to be spent at their discretion. The rest goes for the databases purchased through Mid-Hudson, e-books and downloadable audiobooks through Overdrive, homework help, Internet access, Ancestry Library, literacy materials, and reference materials for the Mahopac Library. 2015: Similar to description above.	Decision Makers: County Executive (elected) & County Legislature (9 members) Timing: Libraries ask for a 3% increase each year. Budget voted on before Election Day; Public hearings in October; Spring: Proclamation by the county legislature using ALA template for National Library Week (start advocating for this in March so that it is done by April, good photo op/press release for National Library Week); Ongoing: visible presence at the legislature meeting routinely – sit together, wear identifying buttons/stickers; bring teens to speak publicly Influencers: Budget drafted by the Commissioner of Finance → County Executive presents budget to the legislature; *Rules Committee oversees library budget line (3 members of the committee); PCLA is routinely in touch with the county executive Conduit: Putnam County Library Association (501c3)

County	Amount Received (2017)	How this compares:	What fund are used for	Timing/Key Players
Ulster County (17 MHLS libraries/21 total)	\$74,250	2016: \$74, 250 2015: \$74,250 2009: \$90,000 This is a line item in the county budget rather than considered one of the “outside contract agencies”	2017: Collectively spent on databases, e-books and Zinnio; increase in amount spent on PR materials; developing a print map of county libraries with hours and info to distribute. 2016: Supports the county InfoPortal [http://uclib.org/infoportal/] Pays for Ulster County share of MHLS database and ebook charges; \$1,000 towards publicity 2015: (Same as above.)	Decision Makers: County Executive (elected) & County Legislature (23 members) Timing: Request letter sent in July/August. Attend three public hearings held in various locations throughout the county; November budget gets approved. Presentation to the Programs Committee, a committee where the UCLA attends their meetings regularly throughout the year. UCLA now pursues a National Library Week proclamation for April annually. Influencers: *Programs Committee meetings; get on their agenda to update them, build case for ask; routinely invite county legislators to libraries Conduit: Ulster County Library Association (501c3)

County Advocacy Techniques: What Works?

- Show up. Be visible. Make sure they know your name.
- Keep things basic; do not assume they know anything about libraries
 - Check out the new annual report template (MS Word) now available to all libraries thanks to the Putnam County Library Association!
<http://midhudson.org/topics/sustainable-libraries/marketing-pr/>
- Get legislators into libraries within their district: to read to children, for photo opportunities, for a VIP/behind the scenes tour
- At public hearings:
 - Use data
 - Be organized – line up speakers, dole out talking points – don't have each person say the same thing
 - Have patrons speak, particularly kids and teens
 - Know what you are asking for
 - Numbers matter in the audience, even if not speaking, library supporters should be visible (buttons, signs, all sit together...)
 - Speak to the value of libraries in context of pressing issues (Putnam County: “after the storm”; Healthy Ulster County; Veterans Home project of the Ulster County Executive)
- Track WHEN action is needed
- All libraries in the county need to be on the same page; know what each other is doing; county funds should be an agenda item on each county director's meeting agenda
- Present budget in a professional manner
- Work on county advocacy year round, not just at decision time
 - Start early
 - Putnam County asks the legislature to do a Proclamation for National Library Week. They use the ALA template as the foundation of the proclamation and begin working on this early in the year so it is ready to go in April for NLW.
 - Four times a year, attend county legislature meeting, get on agenda, report on good things going on at libraries around the county
- Someone has to “take point” – at least one director need to keep track of the timeline, help everyone get organized, keep people informed, delegate work/speaking engagements/etc.
- Cultivate comfort/trust/understanding with legislators
- Make patrons, trustees and Friends visible as speakers/writers/attendees

- Prepare for the next election and for turnover of legislators
- Find ways to convey you are working together with the legislature and county executive towards common goals
- Use “return on investment” message
 - See guidelines for “*Real People. Real Dollars.*” DIY Campaign. [MHLS]
<http://midhudson.org/topics/sustainable-libraries/marketing-pr/>
- Understand who knows who and who is best to speak with/influence a particular stakeholder
- Invite legislators to your county-based events and to local libraries – routinely
- Recognize the need to utilize different communication styles and methods (data, anecdotes, graphics and photos – mix them up); use humor
- Frame your ask – tie to trending topics; understand the political agendas at play
- Seek informal opportunities to speak with executive and legislators. Be in the right place at the right time.
- If you need more funds, ask for more funds. If you don’t ask, you won’t get. When you don’t get what you ask for, don’t sulk, say thank you for what they were able to give you
- Build strong community partnerships – if other organizations view you as a partner they will help advocate for you
- Be visible county wide, like at the county fair!
- Be good at talking about how libraries help with community-wide issues, not just “library issues”
- Have clear answers to the question of whether or not county funds = double taxation. Example messages:
 - Equal access for all county residents, including those in unserved areas
 - Savings by working together via collective purchasing
 - Diversified funding sources for essential services