



Schenectady County Public Library Board of Trustees Meeting
September 19, 2024 - 6:00 pm
McChesney Room – Hon. Karen B. Johnson Central Library

1. Call to Order, Roll Call
2. Public Comment
3. Consent Agenda
 - a. Board of Trustees Meeting Minutes for July 25, 2024
 - b. Board of Trustees Meeting Minutes for August 6, 2024
 - c. Approval of Expenditures – Resolution 1
4. President's Report
 - a. Ad hoc committee to work with Mohawk Valley Library System
5. Director's Report
 - a. Joint Automation withdrawal and status of transition to in-house IT and catalog
6. Friends of the Library Report
7. Committee Reports
 - A. Building Committee
 - B. Finance Committee
 - C. Planning Committee
 - D. Policy Committee
8. New Business
9. Adjournment

The next regular Schenectady County Public Library Board of Trustees meeting is scheduled to be held on November 14, 2024 at 6:00 pm in the Swanker Room at the Karen B. Johnson Library.

SCHENECTADY COUNTY PUBLIC LIBRARY

The regular monthly meeting of the Schenectady County Public Library Trustees was held on Thursday, July 25, 2024 at 6:00 p.m. in the Swanker Boardroom at the Karen B. Johnson Central Library.

PRESENT: Madelyn Thorne, President; Brenda Schworm, Vice President; David Fronk; Sharon Jordan; Steve McCutcheon; Julie McDonnell; Jude McQueen; Tina Chericoni Versaci

ABSENT AND EXCUSED: Carmel Patrick; Bernice Rivera; Angela Tatem

UNEXCUSED: Justin Chaires

STAFF: Beth DeMidio, Director of Operations; Devon Hedges, Assistant Library Director; Michelle Dannenhoffer-Cau, Public Services Manager; Doug Bixler, Support Services Manager; Jan Martin, Board Clerk

GUESTS: Rory Fluman, Schenectady County Manger; Gary Hughes, Schenectady County Legislature Chair; Michelle Ostrelch, Schenectady County Legislature-Vice Chair, Education & Libraries; Charlene Roman, President, Friends of the Library

President Madelyn Thorne called the meeting to order at 6:00p.m.

PUBLIC COMMENT

Nancy Gifford – Scotia, New York. She reported that Jean Frisbee passed away. Jean was instrumental behind the Quaker Street Library. She additionally voiced her concerns about SCPL withdrawing from JA and potentially from MVLS.

Wade Abbott – Rotterdam, New York. He spoke as a resident of Rotterdam and Communication Specialist for MVLS. He spoke about the ongoing discussions regarding SCPL leaving the JA System and exploring partnership with UHLS.

Robin Pelton – Staff member at SCPL. She spoke on behalf of staff and highlighted issues with staffing and programming.

CONSENT AGENDA

Moved by Julie McDonnell, seconded by Tina Chericoni Versaci. Motion passed.

APPROVAL OF REVISED POLICY 6.1 LIBRARY CARDS

Steve McCutcheon made a motion to revise Policy 6.1 Library Cards, seconded by Tina Chericoni Versaci. Revision is as follows: Library cards may be issued at no cost to individuals who reside or own property within Schenectady County or the service areas of the Mohawk Valley, Southern Adirondack or Upper Hudson Library Systems. Discussion ensued. Motion passed.

UPPER HUDSON LIBRARY SYSTEM

Charity Thorne previously sent out an update to trustees after the UHLS Board meeting in July. Open discussion followed.

PRESIDENT'S REPORT

Madelyn Thorne is requesting to have an August meeting. Date TBA.

DIRECTOR'S REPORT

Trustees reviewed the written report by Executive Director Charity Thorne. She also highlighted that our website now has a *Suggest to Purchase* form, we are working on an *ILL Form* and the *Title Request* feature is turned back on for Hoopla. Also, with the hours and staffing changes, we will have four full-time Youth Services staff at the Karen B. Johnson Library with one focusing on teen services.

Beth DeMidio reviewed the Capital Project Budget Requests submitted for 2025.

BUILDING – Written report included in board packet.

FINANCE – No report.

FRIENDS OF THE LIBRARY – No report.

PLANNING – No report.

POLICY – No report.

MVLS REPRESENTATIVE – No report.

NEW BUSINESS

Julie McDonnell acknowledged that the public comments that have been voiced at the board meetings over the past several months have been heard.

Madelyn Thorne asked for a motion to enter into executive session at 7:35 p.m. to discuss matters leading to the discipline of a particular person. Motion made by Julie McDonnell, seconded by Tina Chericoni Versaci.

The executive session ended at 8:47 p.m. and the meeting was adjourned at 8:47 p.m.

SCHENECTADY COUNTY PUBLIC LIBRARY

The regular monthly meeting of the Schenectady County Public Library Trustees was held on Thursday, August 6, 2024 at 6:00 p.m. in the Swanker Boardroom at the Karen B. Johnson Central Library.

PRESENT: Madelyn Thorne, President; Brenda Schworm, Vice President; Carmel Patrick, Treasurer; Justin Chaires; David Fronk; Sharon Jordan; Steve McCutcheon; Julie McDonnell; Bernice Rivera; Tina Chericoni Versaci

ABSENT AND EXCUSED: Jude McQueen; Angela Tatem

STAFF: Charity Thorne, Executive Director; Devon Hedges, Assistant Library Director; Michelle Dannenhoffer-Cau, Public Services Manager

GUESTS: Frank Salamone, Deputy County Attorney

Madelyn Thorne called the meeting to order at 6:02 p.m.

PUBLIC COMMENT

Deborah Noyes – Schenectady, New York. She voiced concerns about SCPL's withdrawal from JA. Wade Abbott – Rotterdam, New York/Communication Specialist at MVLS. He reviewed information about Central Library Aid. He spoke on behalf of himself and MVLS about the impact of SCPL's withdrawal from JA and potentially from MVLS.

Nancy Gifford – Scotia, New York. She thanked the board for considering extending the time period on the JA contract.

JOINT AUTOMATION PROJECT DRAFT EXTENSION AGREEMENT

Trustees were given documents relating to the Joint Automation Project Draft Extension Agreement and were asked to review and agree to the terms in the contract.

Executive Director Thorne reported that at this time because of the impact to the system charters on the state level, it may be that we need to proceed with exiting JA to our own catalog and continue the discussion on what it would be like to change systems down the road. Other discussion revolved around data migration and costs for SCPL to have its own catalog.

Discussion ensued. President Thorne asked trustees if there were any additions or changes to the draft extension. As there were none, she asked for a motion to submit an extension of the original letter of notice to December 31, 2024. Motion made by Justin Chaires, seconded by Julie McDonnell. Motion passed.

The meeting was adjourned at 6:45 p.m. The next meeting will be held on Thursday, September 26, 2024 at 6:00 p.m. in the Swanker Boardroom at the Karen B. Johnson Library.

SCPL Board of Trustees Resolution 1 – 9/19/2024
Approval of SCPL Board of Trustees Expenditures

WHEREAS, it is the responsibility of the Schenectady County Public Library Board of Trustees to approve expenditures of the library as well as its own board;

WHEREAS, the Finance Committee reviewed in detail the expenditures that accrued since the August 6, 2024 Board meeting;

THEREFORE, BE IT RESOLVED, that the Schenectady County Public Library Board of Trustees approve an expenditure up to, but not to exceed SIXTEEN DOLLARS AND 24 CENTS (\$16.24) for payment of items as per the attached expenditure sheet.

Moved by:

Seconded by:

AYES:

NAYES:

ABSTENTIONS:

Schenectady County Public Library Board of Trustees								
April 2024 Expenditures: Trustee Funds								
Fund Code	Location	Vendor/Payee Name and Address	Amount	Purpose				
L547409.4152LN		Ingram Library Services PO Box 277616 Atlanta, GA 30384-7616	\$16.24	Bequest - Books & Materials				
Approved:								
Madelyn Thorne		9/1/2024		Carmel Patrick		9/18/2024		
President		Date		Treasurer		Date		

Executive Director Report to the Board

September 19, 2024

In July and August, we geared up for our hours expansion effective September 3. As part of preparing for all of our branch locations to be open six days a week, we did a lot of analysis of which positions made the most sense to have at which locations. We also worked with employees to make accommodations for their requests related to location and scheduling while still achieving our overall goals of having at least three people scheduled for every open hour wherever possible and someone of the appropriate position scheduled to provide reference and readers' advisory assistance as well as the opportunity to provide programming for youth and adults on nights and weekends. With 76 employees (excluding substitutes), going position by position and branch by branch took some time as you can imagine. Huge kudos to Director of Operations Beth DeMidio for all her work on this project.

The other main area of focus for me was our withdrawal from Joint Automation and everything associated with it, such as our proposed partnership with Upper Hudson Library System (UHLS). There are many associated elements that required calls with vendors such as Clarivate (parent company of Polaris and Sierra) and Overdrive, as well as attending meetings of the various public bodies involved, such as the Joint Automation Council and the Mohawk Valley Library System Board of Trustees. On July 23, we held a meeting with the New York State Library's Division of Library Development (DLD) and Mohawk Valley Library System (MVLS) to discuss SCPL's departure from the JA catalog and the question that arose of system membership given the UHLS desire to have a partnership include full system membership, not just a shared catalog. Some highlights from that meeting:

- Nothing prohibits a library from getting services from another system
- Conversation about changing the structure of a system is a separate issue from changing catalogs
- Changing systems should take a long time to think about the implications of and how it works and the mechanism requires all parties be on the same page
- If there is a path forward for SCPL to leave MVLS, everyone should get on the same page and come up with a plan that makes sense in the long term
- SCPL represents a significant portion of MVLS geographic footprint and population and that should be acknowledged in order to get to a good solution
- There is an option for SCPL to petition the Board of Regents for an MVLS charter change if parties can't reach a shared conclusion locally
- The autonomy of libraries and library systems is really important
- DLD would look at any shared proposals we submitted to them of the best way to continue to serve the public, which might involve legislation, consolidation, or some kind of plea for MVLS to continue to exist as a smaller system

As discussed at the August 6 meeting of the SCPL Board, it was determined to table the question of UHLS partnership given the system change component required for now and focus first on our exit from JA by migrating to our own catalog. This will allow us the greater flexibility and autonomy we seek to be more responsive to patrons while offering an opportunity to continue to work with Mohawk Valley Library System to determine whether continued membership is in the best interest of our library and thoughtfully consider all the implications of changing systems. Migrating to our own catalog means we will stick with Polaris, the system we use now, instead of changing to Sierra, the system UHLS uses. Work has begun on the configuration of our Polaris system, allowing us to decide parameters such as material

types, patron codes, fine block thresholds, and how and when patrons are notified of outstanding balances. Once our Polaris is live, we will still have the ability to adjust these parameters based on Board policy or operational procedure down the road if we choose. An example of what our upgraded catalog will look like can be found here: <https://ypsilantidl.na4.iiivega.com/> (we will make our web address catalog.scpl.org).

Other activities in July and August included:

- Check in meetings with some new hires to see how they are doing and what resources and support they might need to be successful in their new roles.
- Meetings with TBS, the vendor for our upgraded print and PC management software as well as printing/copying/scanning/faxing hardware solution, the ScanEZ station.
- A demonstration of [CollectionHQ](#), a collection management tool I've used previously in other libraries that would allow us to streamline collection management activities, easily review detailed data about collection use, make better selection decisions and improve the performance of our collections.
- Dedication ceremony and Mohawk Colored Giants and Island Park historical marker unveiling at Schenectady County Community College on July 25; SCPL gifted a copy of Frank Keetz's book *The Mohawk Colored Giants of Schenectady* to SCCC's Begley Library.
- Working Group on Girls of Schenectady Uniting for Youth event on August 13; this was a wonderful event where I got to engage with many other key community organizations and make connections.
- Direct Access Program annual meeting held by Capital District Library Council.
- Demonstration of [FacilitySight](#), a people counting solution.
- Interviews for part-time clerk positions.
- The Friends of the Library meeting on August 27 where they approved our request to fund ScanEZ Stations for all nine SCPL locations; we are so fortunate to have this wonderful Friends group helping us to enhance our library services!
- Time spent helping cover the information desk at KBJ; while my duties don't often allow for this, any time I get to spend helping patrons directly is uplifting and enjoyable and I appreciate there having been a need for me to help with coverage.
- Time spent on the configuration of auto-attendants for our 8x8 voiceover IP phone system; all locations now have a message set to play automatically during closed hours listing that branch's hours.
- A meeting to discuss our internal incident report procedures with an employee who had some great ideas on how to improve our process.

And finally, implementation of SCPL teamwork standards and core values. As you all know, we have been working hard to cultivate a culture of teamwork, professionalism and innovation where we all provide friendly, helpful and kind service to one another and our patrons. As we've focused on setting and communicating clear expectations in this area, we developed a document to provide an easy reference for everyone. I've included that in this packet for your information.

Other inclusions in this month's packet are a "myth versus fact" handout relating to our withdrawal from Joint Automation as well as supporting documentation and recent correspondence between myself and the MVLS Board as well as the MVLS Board and SCPL Board in the interest of full transparency. Some of these documents are also posted on the MVLS website.

Public Services

In July welcomed we two full-time librarians, Laura Cernik and Tom Poehnelt, to our Youth Services and Adult Services teams. Mary Ann Warner retired in this month; we thank her for her many years of service. In August we welcomed Serena Wells, a part-time Library Assistant, to our Youth Services team. We are currently canvassing to fill additional librarian vacancies.

Schenectady County Public Library participated in another year of the Summer Youth employment program in partnership with Schenectady County Connects. This year we welcomed four youths who were assigned to the circulation, youth and adult services teams at the Karen B. Johnson Central Library. This 8-week program provides youth with an opportunity to gain work experience at various participating organizations and are assigned work sites based on organizational fit and interest.

In August the Summer Youth Program concluded and the youth assigned to the library flourished, one of our students received an award for honesty after handing in \$60 they found in a returned book! There is funding through Schenectady County Connects for a year-round program and SCPL completed the worksite application to participate. We hope to welcome back the summer student's if they are in the new program. Our application requested three to four students.

Rotterdam

The Summer Reading programs have been very popular, bringing in lots of families to the library to check out boatloads of books and to claim their summer reading prizes and raffle tickets.

Our "Beach Reads" and "Staff Picks" selections have been circulating a lot; we have had to replenish our displays frequently. We have also been doing a lot of reader advisory for patrons looking for a good summer read or a new author. So much summer reading fun!

The County Facilities department completed work on our new staff entrance, which we have begun to use.

Our meeting rooms, as well as our study rooms, continue to see a lot of use. With the introduction of Library Calendar in June, the public can now request a reservation for the use of these spaces online, and many take advantage of that at this branch. The Red Cross held another day-long blood drive here. It was a great success with 18 donors participating.

"Food Truck Wednesday" continues to be a draw for many patrons, residents and area workers.

Quaker Street

Our Cozy Crafters enjoy crafting and conversing in our intimate meeting room so much that they've decided to meet weekly now. Our monthly book club also enjoys consistent participation with members often lingering when the book discussion has ended to socialize and snack.

We've seen an uptick in technology use at the Quaker Street branch over the past two months. Use of our public PCs in July was double the use we had in June, and August saw that trend continue. This is a particularly important service, as many homes in the area don't have access to WiFi. We have also seen an upswing in the use of our mobile printing application, ePRINTit. Many patrons appreciate the ease with which they can print from their mobile devices.

We're especially excited to report that work has begun on our building exterior! Staff and patrons alike are thrilled about the "facelift" our branch is getting with new windows, as well as installation of stone and vinyl siding.

Rotterdam & Quaker Street Youth Services Report

It was a busy Summer Reading season at the Rotterdam and Quaker Street branches. Every Tuesday (at Rotterdam) and Wednesday (at Quaker St.) in the summer, Librarian Stephanie Olson held two programs on both days each week, one in the morning that focused on the pre-k age group, and one in the afternoon that focused on the older age groups (school age & tween/teen). We also collaborated with multiple community partners this summer – one of them being the Boys & Girls Club in Rotterdam. Lindsay Perry, director of the Summer Camp held at BGC in Rotterdam, reached out to Stephanie before the summer to coordinate which events the camp would be interested in attending and we had camp groups coming in and out of the branch throughout July almost daily. One of the projects the Boys & Girls Club participated in that they loved was "Unicorn Magnets," which had 42 attendees!

Another great community partner this year was the Town of Rotterdam. Linda Testa, Director of the Rotterdam Parks Department & Senior Center, and Stephanie collaborated on "Stories and Breakfast" a weekly story time that was held in the many Rotterdam Town parks. Stephanie facilitated the story time and Linda brought all the craft materials and handled the breakfast portion during the programs. We couldn't be more thankful to Linda, the Town of Rotterdam, and all the generosity they continually invest into the program. (This is our second year in a row running the program.) Stephanie also noticed that some of the families who attended "Stories and Breakfast" were not regular library users and after attending the program every Monday @ 10:30, became more familiar faces at the library. Some of them weren't even library card holders or didn't know the Rotterdam branch existed! It was a great way to share what the library has to offer to an audience that normally wouldn't have known. After the summer ended, Linda e-mailed this message to Stephanie: *"Thank you for all that you did to make this year's "Stories and Breakfast" program such a success! You were absolutely amazing with the children with your wonderful story telling and brought the weekly theme to life each and every week with the wonderful crafts you selected for the children! And how lucky were the children to have you play your guitar and sing several of their favorite songs with them! You are truly the best and I look forward to working with you next year!"*

Our community partnership with the Duanesburg Town Park Program also continued this year, for the third summer in a row. The Park Program is essentially a day camp that is free and run by the Town of Duanesburg held in Van Mill Patten Park. It is a great way for kids who are home all summer to get outside and see their peers during their time off. We visited the Park Program twice this year, once with Stephanie running a story time and the second time, doing an art project with oil pastels. She also brought Summer Reading logs the first time she visited, and then the second time, brought prizes for the camp participants to log their reading and receive prizes accordingly. Our highest attended programs at Rotterdam & Quaker Street seemed to be live animal offerings. *Whispering Willow Wildcare*, a non-profit bird sanctuary in Rotterdam, and VIA Aquarium, also in Rotterdam, visited the branches with 67 attendees at both programs for Rotterdam and at least 35 attendees at Quaker Street for both.

Niskayuna

The Niskayuna branch was very busy in July and August with Summer Reading, which brought many

families to the branch searching for books, lots of books! The Summer Reading Program was exciting, and the prizes were rewarding for all.

Amy Relyea, Youth Services Librarian, presented many programs including an Ellen Sinopoli dance class, WMHT events, Divine Donuts, and Shark Catapults. She did a great job planning and executing the Summer Reading Program. We are thankful for her efforts and ability to relate to youth of all ages.

A Niskayuna patron brought staff a delicious box of chocolates and said, *"The service you provide the community is amazing! Thank you for everything you do. I'm amazed at the requests you hold for me."*

Adult Programming is back and is beginning to thrive and draw in new patrons once again.

The Qi Gong program continued to grow steadily throughout July and August. Instructor Maxine Becker plans to make this a regular offering at the branch beginning in October.

Everything Fiber Arts with Joselle Gagliano has also proved to be a popular recurring program. Joselle volunteers her time and expertise and she has gone far above and beyond the call of duty, bringing in new patrons and spreading the word about this new program throughout the community. At her request, we are shifting her time slot to Thursday afternoons starting in September, for the convenience of older patrons who prefer not to drive at night.

Woodlawn

Summer Reading was a blast! Staff had so much fun handing out prizes and seeing how proud the kids were of themselves for reading so much. The prize baskets were a big hit, and one of our winners even sent us a "thank you" card.

Woodlawn hosted 17 programs (adult and youth combined)! All had an excellent turnout.

Tracy Loring brought her *Intuitive Painting Class* to Woodlawn on July 26. Her watercolor painting classes feature a lot of one-on-one interaction and are perfect for our small meeting space at Woodlawn. We had five patrons in attendance including multiple generations from the same family. Her programs have been very successful both here and in Niskayuna!

And finally, even pigeons know to come to the library for help. When staff noticed a pigeon with a broken wing in distress on library grounds, they sprang into action. Searching the internet for local wildlife rescue organizations, one was found in Scotia. Staff were able to "contain" the pigeon until help arrived. Our library staff are proud and happy to help whomever we can!

Scotia & Glenville

For the Scotia and Glenville branch libraries, well-received programs included "Here Be Dragons," themed around dragon books and movies, at the Glenville branch, Scotia's first StoryWalk installation in Collins Park (*Chase the Moon, Tiny Turtle*), and the "Create a Cryptid" art contest at both locations. 25 programs total in July, including passive programs, were presented between branches, and staff worked to promote the summer reading program to both adult and youth patrons. Community partners and vendors appearing at the libraries in July included Goldfish Swim School, trivia master Matt Krupa, Ms. Lisa Russo, and Cornell Cooperative Extension. The Teen Writing Club welcomed their second author visit, local teen author Shreya Sharath, for a Q&A.

The first two TAG Team (Teen Advisory Group) sessions were facilitated in July, with useful and actionable feedback from teen patrons and their parents regarding collections, programs, and teen spaces.

During August, the summer reading challenge and associated youth programs continued and concluded at the Scotia and Glenville branches. Well-received programs included Glenville’s end-of-summer “Mario Party,” which attracted 46 parents and kids, Scotia’s second StoryWalk installation in Collins Park (*The Wind and the Clover*), and Scotia's Intro to Dungeons & Dragons series. The Teen Writing Club welcomed their final author visit, the creator of the storytelling game “Colossal” Kay Marlow Allen, and also celebrated their collaborative game efforts with an off-site end-of-summer party at a local coffee shop. 22 programs total, including passive programs, were presented between branches. In total, Scotia and Glenville youth patrons read a combined 3,684 hours from June through August.

07/2024 CIRCULATION						
	CURRENT	LAST YEAR	CHANGE	FYTD	LAST FYTD	CHANGE2
Bornt	1,017	978	4%	5,273	6,548	-19%
Central	17,992	21,164	-15%	122,937	129,942	-5%
E-Resource	16,219	14,669	11%	114,630	94,342	22%
Glenville	5,842	6,202	-6%	36,079	38,920	-7%
Mont Pleasant	893	1,429	-38%	8,833	8,682	2%
Niskayuna	12,457	13,054	-5%	72,292	77,823	-7%
Quaker Street	2,079	1,974	5%	12,149	13,417	-9%
Rotterdam	7,542	8,294	-9%	44,570	48,241	-8%
Scotia	3,966	3,853	3%	22,828	21,877	4%
Woodlawn	1,371	1,236	11%	8,169	8,509	-4%
07/2024 INTERACTIONS						
	CURRENT	LAST YEAR	CHANGE	FYTD	LAST FYTD	CHANGE2
Bornt	265	268	-1%	1,956	1,765	11%
Central	2,071	1,911	8%	13,614	11,934	14%
Glenville	63	84	-25%	468	599	-22%
Mont Pleasant	464	129	260%	3,036	1,247	143%
Niskayuna	347	357	-3%	2,581	2,922	-12%
Quaker Street	81	40	103%	453	369	23%
Rotterdam	205	105	95%	935	832	12%
Scotia	249	180	38%	1,497	1,449	3%
Woodlawn	27	52	-48%	262	500	-48%
08/2024 CIRCULATION						
	CURRENT	LAST YEAR	CHANGE	FYTD	LAST FYTD	CHANGE2
Bornt	832	1,152	-28%	6,105	7,700	-21%
Central	17,575	20,806	-16%	140,512	150,748	-7%
E-Resource	16,272	14,922	9%	130,902	109,264	20%

Glenville	5,607	6,390	-12%	41,686	45,310	-8%
Mont Pleasant	1,301	1,281	2%	10,134	9,963	2%
Niskayuna	11,431	13,447	-15%	83,723	91,270	-8%
Quaker Street	1,456	2,502	-42%	13,605	15,919	-15%
Rotterdam	6,974	8,336	-16%	51,544	56,577	-9%
Scotia	2,980	4,113	-28%	25,808	25,990	-1%
Woodlawn	1,180	1,241	-5%	9,349	9,750	-4%

08/2024 INTERACTIONS	CURRENT	LAST YEAR	CHANGE	FYTD	LAST FYTD	CHANGE2
Bornt	194	380	-49%	2,150	2,145	0%
Central	1,711	1,953	-12%	15,325	13,887	10%
Glenville	68	83	-18%	536	682	-21%
Mont Pleasant	549	281	95%	3,585	1,528	135%
Niskayuna	481	303	59%	3,062	3,225	-5%
Quaker Street	61	101	-40%	514	470	9%
Rotterdam	145	205	-29%	1,080	1,037	4%
Scotia	193	230	-16%	1,690	1,679	1%
Woodlawn	17	88	-81%	279	588	-53%

Support Services

With all of the credit card terminals installed, sales continued to trend upward in July with an increase of \$763.99 compared to July 2023. The trend continued in August with an increase of \$888.92 in sales compared to August 2023.

The contracts with Clarivate and TBS for public PC and print management were executed, allowing SCPL to continue efforts to enhance services and patron experiences.

The Mont Pleasant camera server requires an update, and a quote was obtained through the proper procurement process to progress with the update.

There was a lot of progress with capital projects. Bidding for the second-floor staff break area and restrooms closed mid-August. The Quaker Street siding and window replacement began. The landscaping project at Glenville continued with the laying of the pavers and the installation of a new sprinkler system along the front entrance flower beds. Finishes for the sound attenuation projects at Glenville and Scotia were finalized along with those for the Niskayuna program room update.

The fire doors leading from the public space to the back staff entrance at Karen B Johnson Central Library received a much-needed enhancement. Director of Operations DeMidio worked with the facilities team to allow the library to upgrade the doors to be automatic and handicap accessible. Since the upgrade staff and volunteers have been appreciative of rolling book carts, deliveries and donations with ease down the hallway!

Electrical and data were added to two shared workspaces that are converted conference rooms. We are thrilled to be able to move forward with assigning staff dedicated workspaces away from the service desks for their off-desk time and focused tasks. With the hours expansion and location reassignments staff will be able to begin to settle in their new locations.

From an IT standpoint, we had a very productive summer. We continue to roll out new laptops to employees, along with docking stations at various branches and locations for employees to connect their laptops with and facilitate flexibility and mobility. Our DVD cleaner was sent out for repair and cleaning which helps us keep our collections full of working discs that do not skip on playback. We are working with IT to install privacy screens to all public and public-facing staff computers to help keep sensitive information private for both staff and our public. All new self-checks are in place and working wonderfully, the newer technology found in these self-checks has made erroneous scans of our RFID labels in our materials a thing of the past!

Website development has continued over the last two months. We are hoping to launch within the next 45-60 days.

We've had multiple meetings with County IT preparing for our disconnect from JA. New Spectrum lines have been installed to prepare for new server hardware installation so we can begin to connect our branches to one another and implement upgrades.

Conversations and paperwork for our new Printing/Copying/Faxing/PC Management hardware/software systems through TBS have continued this summer with an expected roll out time frame of November 2024. ePRINTit will be tied into this system as well so staff time will be drastically cut having to release prints manually for our patrons. This system will allow our patrons to use cash, coin, debit, credit, and tap to pay (such as Apple Pay/Google Pay) to pay for these services.

We announced in the last week of August a few things for our patrons. First, we changed hours at some of our branches to allow for all 9 SCPL locations to be open on Saturdays, as well as providing extended hours at some of our smaller locations that line up better with our patrons' life schedules. Secondly, we announced that for Library Card Sign-Up Month (September) we were going to be running a promotion where we'll select someone to receive their choice of an iPad/Kindle for adults or a Nintendo Switch for ages 17 and under from any Schenectady resident that signs up for a new SCPL library card (or renews an expired card). The SCPL location that has the most sign-ups proportionate to the size of the region they serve will win a staff pizza and dessert party. Many thanks to the generous funding the Friends of the Library provide each year for programs like this for patrons and the staff!

SCPL Teamwork Standards & Core Values

We recognize that each employee plays a role in creating a healthy, supportive workplace. Therefore, I strive to...

- support the mission and goals of the County of Schenectady and Schenectady County Public Library
- consistently apply and implement library rules and policies
- recognize that everyone plays an important role in achieving our common goals
- work to make everyone on the team's job easier
- respect the contributions of all staff and volunteers
- speak supportively about our County, customers and our co-workers
- look for ways to help everyone succeed
- look for solutions, not fault
- take responsibility for my actions and move toward solutions
- accept feedback and act on it
- ask questions and listen carefully to make sure I understand
- communicate my thoughts and feelings clearly
- address issues directly with others
- remember QTIP ("Quit Taking It Personally")
- recognize the attitude I bring to my work affects those around me
- treat others with respect
- act in a way that demonstrates professionalism, serves the public and reflects well on SCPL
- remain adaptable and support the concept of change
- contribute to discussions and support final decisions
- prioritize the good of the whole (team) over my individual preferences and responsibilities
- work toward self-development through accepting feedback and updating my skills
- achieve a healthy work-life balance

Core Values

Kindness

Be friendly, helpful and kind to all. We demonstrate kindness and helpfulness in every interaction and to everyone we come into contact with as a function of our organization.

Privacy

All people, regardless of origin, age, background, or view, possess a right to privacy and confidentiality in their library use. We advocate for, educate about, and protect people's privacy.

Equity

We actively work to dismantle barriers and create spaces that are accessible, welcoming, and beneficial with equal opportunities to access library services for all those we serve.

Teamwork

Demonstrate teamwork through working together to make SCPL better. Share goals and hold ourselves and each other accountable. Take ownership of the team's work and personally commit to finding solutions. Be proactive in identifying tasks, problems, projects or service needs, and act on them appropriately. Reach across teams for better outcomes. Support the growth and development of all members of the team. Share and celebrate success by valuing and recognizing each contribution.

Communication

Demonstrate open and honest communication. Approach communication with kindness and positive intent, always. Focus on over-communication to ensure effectiveness; relationship build with all stakeholders. Pro-actively report on the status of projects and assignments, keeping others in the loop on progress. Actively listen and ask questions to increase understanding; listen to learn, not to respond. Communicate in ways that make sense to the listener and choose the most effective method based on the audience/topic and check for understanding.

Professionalism

Produce high-quality work and deliver exceptional service to internal and external customers. Exhibit pride in professional appearance, language and behavior. Assume responsibility for a clean and safe work area. Maintain composure in challenging situations. We respect others, express sincere appreciation, and positively influence those around us.

Integrity

We behave ethically and with integrity. This means being honest (avoidance of a lie is not the same thing as honesty). Admit mistakes and apologize. Be truthful (and kind) in reporting, in meetings, with other departments, customers, vendors. Do not lie by omission or implication. We do the right thing, always. We appropriately question actions inconsistent with our CORE Values. We make honesty and transparency the foundation for all actions. We are accountable at all levels. We avoid the appearance of impropriety.

Innovation

We are driven by continuous improvement. We find ways to make things better. We optimize results by working smarter. We are empowered to take risks, learn and grow. We learn from our failures and our successes. We continually re-imagine operational processes for better results.

Myths versus Facts Related to Withdrawal from Joint Automation (JA) Project

<p>Myth: Patrons will have to drive to other libraries to check out their resources.</p>	<p>Fact: Patrons will be able to place requests for items owned by other libraries to be picked up at their preferred SCPL location.</p>
<p>Myth: Interlibrary loans come by mail and take a long time to arrive.</p>	<p>Fact: Interlibrary loans do not all come by mail; the vast majority come through the same courier delivery service that holds placed in the JA catalog do. Check out https://linx.cdlc.org/ for more information about the system that connects regional libraries for resource sharing.</p>
<p>Myth: Interlibrary loan requests have to be placed in person at the Hon. Karen B. Johnson Central Library.</p>	<p>Fact: Interlibrary loan requests can be placed in person at any SCPL location, online, or by phone.</p>
<p>Myth: Interlibrary loan requests are handled by only one SCPL employee.</p>	<p>Fact: There is a team of SCPL employees handling interlibrary loan requests.</p>
<p>Myth: Interlibrary loan requests can only be picked up at the Hon. Karen B. Johnson Central Library.</p>	<p>Fact: Interlibrary loan requests can now be picked up at any branch of SCPL.</p>
<p>Myth: SCPL's collection isn't as robust or as large as that of other area libraries.</p>	<p>Fact: SCPL has over 100,000 more items in its collection than Clifton Park-Halfmoon Library, Crandall Public Library, or Saratoga Springs Public Library (as of 09/07/2024): SCPL: 327,770 Clifton Park-Halfmoon: 198,499 Crandall Public Library: 211,596 Saratoga Springs: 216,297</p>
<p>Myth: The majority of items SCPL patrons check out come from other libraries.</p>	<p>Fact: Only 8.32% of the items checked out in 2023 came from other libraries; the vast majority of checkouts came from SCPL's collections. In the past this figure has been as low as 3% and managing our own catalog will provide us with much more data and tools to help stock the materials you really want, keeping our collections fresh and relevant.</p>

<p>Myth: SCPL is leaving the Mohawk Valley Library System.</p>	<p>Fact: SCPL is withdrawing from the Joint Automation (JA) Project which means that we will have the opportunity to manage our own IT and catalog. JA is separate from the Mohawk Valley Library System (MVLS). SCPL remains a member of MVLS.</p>
<p>Myth: SCPL is losing Central Library funding due to withdrawing from JA.</p>	<p>Fact: SCPL was already no longer receiving Central Library funding; the last year for which SCPL received Central Library funding was 2022 (received in 2023). State regulations changed allowing considerably more flexibility to do other things with Central Library funds than purchase physical materials and so the activities funded by Central Library funds changed.</p>
<p>Myth: Central Library funding received by SCPL was paying for essential services.</p>	<p>Fact: The Central Library funding SCPL was receiving in recent years was reimbursement for the salary of a staff member selecting the adult print non-fiction materials for purchase with Central Book Aid funds. With the change in Central Library regulations, MVLS began spending all the funds directly at the system level.</p>

August 29, 2024

Dear Mohawk Valley Library System Board of Trustees,

Last week, SCPL, along with the rest of JA, was notified reciprocal holds through the catalog are being disabled effective 08/31/2024. At the August 5 transition team meeting, it was stated the recommendations from the JA ad hoc committees needed approval from the SALS and MVLS boards, and those bodies would next meet in September. However, to my knowledge, no MVLS meeting has been held since then, and it was disappointing to hear JA is proceeding with this change anyway. This week, we received notice from Crandall Public Library that OCLC interlibrary loan service has been suspended as of August 20. This system service, which MVLS contracts Crandall to provide, being halted without prior explanation or warning was unexpected and disheartening.

These developments, along with some others I'll outline below, have compelled me to reach out to the governing body responsible for MVLS to clarify some things and request that the system reconsider taking steps that harm service to library users. I've remained largely silent on these matters, preferring to focus on directly improving services to the public. However, given the misinformation being disseminated surrounding our withdrawal from Joint Automation (JA), it's time to set the record straight and speak to my experience as director of an MVLS/JA member library.

As the person most directly responsible for our library's operations and the one most familiar with every aspect of how they are affected by our catalog and IT (both controlled by MVLS/JA), every change SCPL is making is aimed at improving services, fulfilling our mission, removing barriers to access and improving the organization's overall health. Despite the long list of issues we've documented, I recognize many may not fully understand how being part of MVLS/JA hampers our operations so I will attempt to further explain.

The opinions expressed here are my own as the Executive Director of Schenectady County Public Library and I do not claim they reflect those of Schenectady County, the SCPL Board of Trustees, or my fellow MVLS directors. I write to you as someone who has worked in public libraries for 20 years in four different states with many different ways of doing things and never encountered anything as dysfunctional as my experience with this system.

First, it's important to clarify that the County has neither forced nor pressured SCPL's decisions, including the pursuit of county IT support, withdrawal from JA, or exploring partnership with UHLS. The Schenectady County legislature and County Manager have been incredibly supportive, as demonstrated by their substantial financial commitment to the library, which has seen a \$1 million increase in the operating budget over two years. Repeated discussions were had by SCPL Board of Trustees about various elements of our dissatisfaction including no longer receiving Central Library funds, Overdrive selection, the Board policy regarding our fine block threshold, and having our own IT. These took place at public meetings in accordance with the Open Meetings Law. I'm grateful for trustees who are engaged and committed, unwilling to remain stagnant in the way we serve our community. Our departure from JA is a crucial part of transforming SCPL.

Attached is a timeline of key events leading up to our withdrawal from JA, highlighting the persistent roadblocks I faced when seeking changes to better serve our needs. I believe we truly were left with no choice other than withdrawing from JA in order to move our library forward in

providing good library service. Despite my efforts, there was rarely a clear next step (much less resolution) to achieve demonstrable progress, and the process often involved outright refusal or shifting goalposts. I have yet to be told or see a clearly defined, documented process for instituting change at the system level or within Joint Automation. The closest thing to an explanation of the process was when Eric was asked by another director at a MVLS Directors Council on March 6 "if we want changes to JA policy or contract, do we talk to you?" Eric replied "that's one option, there is no wrong way, we can talk to [Eric], a JA staff member or Sharon." As you will see in the timeline document, we have absolutely talked to Eric and JA staff about the changes we wanted. I, as I suspect many of my fellow directors already knew, learned it is pointless to try and turned my attention to how else we can achieve what this library needs. You will also see we were open about considering whether JA continued to be the best IT and automation solution for us and reconsidering our membership. I cannot speak to whether Eric and Michele chose to share their knowledge of this with others at JA, SALS, or MVLS.

One key issue—the fine block threshold—exemplifies the typical experience. First MVLS said no (supposedly on behalf of other members) well before my time. Then they repeated that to me when I inquired. I brought the issue to the other members and there were no outright objections, yet somehow it had to be discussed again, and again, and again until there were objections (although none of the communications I'm aware of ever involved every member of MVLS unanimously objecting as stated by Eric – perhaps there was some secret poll or meeting where this took place?) The amount of time and effort invested pursuing just this one change of many needed (ultimately unsuccessfully) served as a valuable demonstration of the futility of expecting MVLS/JA to work with us. The detriments of any consortium or system that makes it this difficult for SCPL to operate and retain the flexibility and autonomy we need to serve our diverse community far outweighs any benefit.

Is access to collections beyond our own in the same catalog worth being hampered in every facet of our operations that IT or the catalog touch? No, of course not. All the time, energy, money and resources we spend trying to work around the culture of "no" and control could easily be spent filling the gap between what our patrons want and what our collections currently contain instead, and of course we can continue to interlibrary loan materials from other area libraries quickly and easily through means other than the shared catalog.

Another example of how Schenectady patrons suffer as members of MVLS/JA: until very recently (after nearly two years of asking) only one SCPL employees of those we've requested in my time here has been allowed by MVLS/JA to have the access needed to place orders and process new materials in the catalog. This means when that one person is not working, no orders are placed and boxes of new items that come in sit and wait for their return. This is absolutely unacceptable and directly impacts our patrons. The reason given for none of the others we've wanted to get trained and the access to assist with these tasks has been if they aren't going to be doing it as regularly as our one full-time person assigned, they will surely make too many mistakes. What a demeaning and belittling approach, to say our staff are not capable or competent enough to correctly perform tasks they don't do every day and that the decision of who to assign which work to in our organization gets to be dictated by a third party such as MVLS/JA. You can see this stance going strong in the minutes of the recent ad hoc ILS committee where they note under "ability to do our own cataloging: best left to the professionals", which seems to clearly imply member library employees are not professionals.

Likewise in the ad hoc ILS committee, there was discussion of SCPL's desire to be able to filter by available items within a search. It looks from the minutes like the discussion concluded this is already available. This reflects a lack of understanding and a missed opportunity to enhance the patron experience. Currently you can choose in your initial search (from the drop down) to see only currently available items. This is far different from being able to conduct a search by location, item type, keyword, etc., and then filter from there to show the subset of those search results that is currently available on the shelf at a specific location. [Here is a library's catalog](#) who uses the same software JA does where this option is configured. What a disservice to our patrons not to be able to search by one of our locations AND by only items available on the shelf at that location, and only by one or the other. If only MVLS/JA's culture reflected a commitment to working with members to fully explore and problem-solve to meet their needs instead of summary dismissal; there are many similar improvements available that could be implemented.

The JA ad hoc reciprocal borrowing committee is another example of the inadequate justification provided for impactful decisions that are detrimental to patrons and the lip service being paid to collaborative problem solving and decision making. The idea that all items have to be back at their home location before SCPL's exit from the catalog because if not, there is no way to "track" those items afterwards because they won't have been checked in before being put into the delivery bins, is extremely misleading and typical of the fearmongering I've experienced.

- 1) This premise that suddenly our courier Arnoff will begin losing items at an astonishing rate because they haven't been checked in before being put into the delivery bins is based on what?
- 2) There are other ways to track the items - SCPL could easily scan barcodes and record the dates of everything we put into a delivery bin so we have the exact same data to reference of when an item was returned that we do now through Polaris.
- 3) SCPL could plan to run our new ILS concurrently with Polaris (for check-in of other libraries' items only) for some amount of time to accomplish the same thing.
- 4) Delivery is a system service and will continue as long as we are a member of MVLS. Items will continue to move through delivery between libraries for interlibrary loan after our exit from JA (as they do now to/from non-JA libraries), whether those items were requested and tracked through a shared catalog or not.

The other similarly flimsy concerns had equally doable alternate solutions. However, at the one committee meeting held on this topic, there was zero interest or willingness to explore any other way of meeting the supposed goals (none of which included minimal disruption to patron access at the time). The refusal to explore alternative solutions suggests a punitive intent toward SCPL and its patrons for pursuing what is best for our library. If this is not intended punitively, it certainly has a punitive impact, and further demonstrates that SCPL's priorities of patron access and experience are a complete mismatch with the priorities of MVLS/JA, which seem primarily focused on protecting the collections from patrons at the expense of encouraging utilization of them.

I'd like to address the idea that it's not possible to accommodate SCPL given there are 48 other libraries in JA. My last ILS consortium in Illinois has roughly double that number of libraries. Check out [their circulation policies](#), which very clearly allow individual libraries (and their governing boards) to set policy for that library. They address any concerns members have about how another member's policies impact them by routinely billing each member library for items

checked out by their patrons that belong to another library and are long overdue. This remedies any concerns that one library's policies around borrowing limits, block thresholds, etc. could be detrimental to another member library financially. I suggested this idea to MVLS early on in our discussion with them about SCPL's fine block threshold and was told "there's no reasonable mechanism to make that happen." No attempt to explore it, problem solve, check with Polaris, or research the reports available and whether any of them were suitable. This has consistently been my experience when asking for a change: no interest or willingness in collaboratively problem solving, just a no. The initial explanation is often vague and falls apart when probed or fact checked (another unnecessary and wasteful use of member library staff resources) and sometimes another explanation is offered as a replacement obstacle. It is not fiducially responsible for SCPL to invest the significant time and energy attempting to change the culture at MVLS/JA nor having to fact check the accuracy of every justification provided or do all the work of investigating and exploring how to problem solve to meet our needs with MVLS/JA as a hindrance standing in the way. Those resources need to be utilized to serve our public, not work around our system.

There are ways to meet the needs of every library in a cooperative in my experience working in others. There does not have to be consensus, commonality, or even majority agreement and things do not have to be done uniformly system-wide. Is it more work to tailor services, program individual policies, and ensure every unique, diverse, individual library's needs are met to the greatest extent? Yes, work that is well worth it and the responsibility of any cooperative who serves diverse members, in my opinion. In fact, in my experience other places, the role of the system has been one of a leader in proactively seeking out innovative ways of furthering library services and offering to assist members in implementing those as desired. My experience with MVLS/JA has been a stark contrast to that.

I am appalled at the treatment my library and my fellow libraries have endured, seemingly for many years, without any recourse. As a large library with the means to break away and do something else, I refuse to allow our library and our mission to be sacrificed for the sake of avoiding disruption and am thankful to have stakeholders who feel the same. I sincerely hope the ripple effect from us taking action to improve our library's situation results in positive changes for the remaining MVLS libraries who also deserve a culture of "yes", a partner who sincerely works hard to problem solve with them and treat them as the capable professionals they are who know what's best for their libraries and can make decisions about their operations to reflect that. No library should have to be martyred or forfeit their autonomy and flexibility and their board's governing authority to be a part of a cooperative that should be mutually beneficial for everyone. I know this to be entirely possible from experience and would be neglecting my duty to the Schenectady community if I accepted the status quo.

At an MVLS Directors Forum on August 22, Eric indicated SCPL patrons would be denied access to the Overdrive platform resources purchased with Central Library Aid if SCPL does not also pay a fee to contribute to the purchasing of Overdrive materials on the MVLS platform. Unfortunately, MVLS has refused to allow any member library to select their own materials for purchase with their contribution to the shared collection and SCPL can no longer in good conscience turn over a significant sum of money to be utilized by the system with no control over the materials selected. We have already done this for many years and are now being told we'd be denied access to those materials we helped fund (as well as those funded with Central Library funds) if we don't continue to pay. I believe being able to select the materials we contribute to the

shared collection, informed by detailed data and reporting about SCPL patron holds and requests, is critical to best serving our primary constituency of Schenectady County while still sharing resources with the rest of the system, and I have seen documentation SCPL has been asking for this option for many, many years. I also do not agree with the policy set by MVLS to block Overdrive borrowing at \$5 owed; digital materials cannot be lost or kept overdue and it is punitive to restrict access in this way.

The adult nonfiction books previously purchased with Central Book Aid funding are being removed from our shelves to be housed at MVLS for 1-2 years. While I have no objection to the items being relocated in anticipation of our no longer being Central Library for the system, I do object to worsening patron access and experience and this move makes no sense from that perspective. Why can't those items be housed at a non-Central Library location? Ostensibly it is due to being purchased with Central Library funding, however the inDEMAND books purchased with Central Library funding have been housed at every MVLS library all along. How is it better public service and more accessible to have those items at the MVLS building, where patrons cannot come to browse and check them out, than to have them on our shelves where the public could browse, check them out directly, AND search our catalog and then place a request through their local library to pick them up locally? I have asked MVLS how they would like SCPL to request those items for SCPL patrons going forward and have not received a reply. Was access to the whole system considered in this change, or only everyone except SCPL?

I say all of this with a heavy heart. In most of the places I have worked in public libraries, the library community has been the best, most wonderful part of the job aside from being able to help patrons. I am accustomed to colleagues, neighboring libraries and library cooperatives who are happy to do the work of coming up with mutually beneficial solutions or ways each library can individually do what they need for their library while also cooperating in ways that work well for everyone. Likewise, I have always found my public library colleagues a wonderful resource and support system that is quick to offer help both individually and as a whole from one library to another because we all believe in the greater good of public library service even when it's not about specifically benefiting the individual community we are chartered to serve. This is not to say that I haven't witnessed this same admirable spirit of helpfulness and cooperation in NYS libraries in this area, only that I am sorry to see the system I am a part of seems to work against this spirit instead of for it.

I don't wish MVLS or its libraries any ill will and on the contrary I've done everything I can think to do during this process to open lines of communication with my fellow MVLS directors and keep them informed with accurate information to the best of my ability when the system does not, and offer assistance however I can to make this disruption easier for them that does not involve sacrificing my duty to my library or my patrons for their gain. I am happy to advocate for what's best for them as well as what's best for SCPL and in fact made the preservation of MVLS without Schenectady County a key topic for the meeting I arranged with MVLS and DLD. It does not have to be a zero-sum game where Schenectady loses and MVLS wins or vice versa, and it shouldn't be.

One sentiment I've heard repeatedly is "if it's not broke, don't fix it." That is not a viable option in this day and age for libraries to remain relevant. Innovation is critical in our field, which means continuously improving and seeking out better ways of doing things. And as I hope you now understand after this more in-depth explanation, membership in MVLS/JA has been a very broken thing for SCPL for a very long time. Unfortunately, there do not seem to be any checks and balances

designed to protect member libraries from being detrimentally impacted by decisions made by the system, or at least not functional ones.

It is difficult to send this letter due to concern about what other harmful actions will be taken; fear that things will only be made worse for us by MVLS if we don't submit to the status quo is a powerful motivation not to take action but I must think long term and big picture about what is best for our library. I've been a part of multiple conversations with other MVLS directors where the idea of sending a letter to the MVLS board to express shared concerns was raised, then dismissed as unlikely to result in meaningful change and fear it will result in worse treatment. However, given at this point it seems clear SCPL will continue to suffer as a member of MVLS whether I speak out now or not, I feel obligated to ensure the MVLS board has had every opportunity to be fully aware of the state of the system. A fellow MVLS director said something along the lines of "we all see what you're going through and we don't want to deal with that" not long ago - well, I'm already going through it so I'm best positioned to speak up.

While I could say a great deal more about my experience of MVLS/JA and speak to a number of the other inaccuracies being spread about SCPL, this letter is more than long enough and there is work to do to serve the public and support my dedicated staff. In closing, I have a few questions I hope you'll thoughtfully consider:

Do the actions and behavior of MVLS and JA as reflected here and those you have personal knowledge of match Eric's statement that "[MVLS is continuing to work closely with Schenectady and other member libraries to make the process as seamless as possible and to prevent impacts to patrons](#)"? Is this truly the best MVLS can do in support of that statement?

Do all signs point to MVLS providing top notch service to members and prioritizing library service and acting in good faith to build trust and relationships among members, partnering organizations, their boards and the public? Both intent and impact matter here.

Do all actions of MVLS demonstrate the intention **and** have the impact of empowering libraries to serve communities?

I can tell you with respect to the latter, the only way to empower our library seems to be to have as little as possible to do with MVLS and JA. Also unfortunately, based on my experience with MVLS and JA, every day as an MVLS director is a miserable, stressful experience where I must expect further attempts to make resource sharing more difficult or complicated, or at least to make it seem so to the public, in what certainly appears to be every effort to wrest back control of SCPL and force us back to a way of doing things that precludes our ability to provide the best library service. What's next, somehow reducing resource sharing by trying to prevent SCPL from participating in interlibrary loan outside of the shared catalog (such as using CDLC's Linx service to request SCPL items for pick up at MVLS libraries and vice versa as we already do with other area libraries)? Or reducing delivery to SCPL? It is exhausting trying to anticipate how MVLS/JA will hurt us next, and our decision to withdraw from JA being used to justify reducing other services is both horrifying and consistent with my experience of MVLS to date.

If it turns out all of these actions that harm service to library users and this way of operating are done with the full knowledge and support of the MVLS Board, it strongly suggests that continued membership in MVLS is detrimental to our library. While much talk has been dedicated to the idea of focusing on serving member libraries including SCPL, no substantial action has been

taken to better serve SCPL. I would kindly request that MVLS serve and empower us by working cooperatively with us on a proposal to the state that allows SCPL and MVLS to part ways on a reasonable and mutually agreed to timeline while preserving MVLS. I continue to be ready and willing to work together on ways to improve resource sharing and collaboration among area libraries for the benefit of all.

If you've made it all the way to the end of this letter and reviewed the attached timeline, thank you. You've committed significant time to hearing the perspective of the director of one of the member libraries your system is chartered to serve, and I appreciate it.

Sincerely,
Charity Thorne
Executive Director of the Schenectady County Public Library

CC Lauren Moore, Assistant Commissioner for Libraries, New York State Education
Department

Here is a summary of some key events prior to SCPL's withdrawal from JA although by no means an exhaustive account of every issue, concern or communication.

On May 17, 2023, after a lot of back-and-forth communications via email asking questions about various SCPL IT concerns, Laura Baker with County IT had a meeting with JA staff. [Here's Laura's email](#) about that meeting. As a follow-up to that meeting, it was suggested SCPL/County IT/JA meet again in early June.

On May 25, 2023, the SCPL Board approved a budget request to the County that included adding IT positions and capital project for IT infrastructure expenses.

On June 2, 2023, we met with JA staff (Chris Mundell was not in attendance) and Sharon O'Brien. Laura Baker with County IT asked all the technical questions about how other large libraries manage various components of IT and possibility of us doing things like having our own Microsoft tenant and email. We asked JA if our fee would change if we managed our own IT, they said no. One of the concerns raised at this meeting was that JA did not allow us to put our VOIP phones on "their" hardwired network when it was initially rolled out at our Central Library in 2022, and consequently patrons and staff had been suffering through dropped calls and poor connections due to the phones being on Wi-Fi for around a year at that point. We also had delayed rolling out VOIP to our other 8 locations due to concerns with quality on a Wi-Fi connection. Laura had a follow-up conversation with Chris Mundell after the June 2 meeting and the outcome of that additional meeting was JA allowed us to begin connecting our VOIP phones to the network.

On June 9, [Michele sent a follow-up email](#) to the June 2 meeting where she stated:

"I wanted to mention that if you were to pursue a public PC management solution other than Cassie or use our standard public PC image (like you do at your non-Cassie branches), JA would not be able to provide support for them. We just do not have the staff to provide full support for another product. If you were to have your own IT staff, that would be something they would need to manage. The same is true if you were to go with a different configuration for your staff PCs. Adding Active Directory, for example, requires management and would be best if you had your own IT staff."

On July 27, after months of conversation about implementing SCPL's block threshold policy (you can read some history of it via emails [here](#), [here](#), [here](#), and [here](#)), in an [email to Eric](#) I stated:

"At this point there have been numerous discussions in numerous ways and it's not clear to me how we can effect change other than maybe getting our own ILS!"

Board President Tina Versaci at the time [replied](#):

"This issue is of utmost importance to our Board as we have been hearing many complaints about this inconsistency. I feel that when we explain the reason for the hold up, it does not reflect well on MVLS or JA. "

[Eric then replied](#) to her only:

"I am glad to see this moving forward. I do want to make clear that the hold up isn't MVLS or JA. It is the other member libraries. When libraries want to make changes that affect other participants in the consortium, they don't so much have to convince staff at MVLS or JA, they have to convince a majority of the other 55 member libraries. Sometimes that is hard. Sometimes the consortium is frustrating and unwieldy, But it is worth it, for two reasons. One is, of course, money. No library could do the technology, delivery and resource sharing, etc. for what the systems cost. But even more than that, the resources that become available could not be accessed for any amount of money. SCPL - the biggest

library in the consortium - has holdings of about 325,000. Through JA, you have access to over 2.3 million items. You really can't put a meaningful price tag on that."

On August 18, 2023, after a few more back and forths about the block threshold, I sent this [in an email](#) to Eric: "I've been dismayed to find our membership in this cooperative the biggest challenge I'm facing so far in improving efficiency, productivity and customer service to our community. I have not encountered anywhere near this level of constraint and insistence on controlling individual library policy and procedure as members of other library cooperatives, systems, and consortiums, some of which have been considerably larger and had more complexities to consider. Our participation in Joint Automation seems more of a detriment than a benefit. I would love to find a way to adopt a more solutions-oriented approach to working together and am open to any suggestions you have that address the (so far hypothetical) problems caused by SCPL having a \$100 block threshold."

On August 21, [Eric sent an email](#) in response (not a direct reply and added in Kim and Valerie) where he acknowledged our stated unhappiness with JA by stating:
"Now, I want to address your frustration with working within the JA consortium."

On September 28, I sent out an invitation to all SALS and MVLS directors to a demonstration of TBS's print/copy/scan/fax equipment and PC and print management solutions we'd arranged at SCPL. I received [this reply](#) from Eric and Michele and sent them a reply on October 2 where I stated:
"If we end up deciding to go this route and find it's not compatible with JA's requirements, that would certainly factor into our continued consideration of what the best IT and automation solution for us looks like."

On November 9, 2023, Laura sent [this email](#) to JA about our transition plan for county IT to take over our IT after the county budget was adopted on October 12 including adding IT support for the library and capital projects to replace all network equipment. Here is the full email thread leading up to the follow up meeting in January. Of particular note in the reply I sent on December 1:
"Would you reconsider requiring us to maintain and monitor an additional email account through you so we can move forward with this? If not, unfortunately we will need to reconsider our membership in Joint Automation entirely."

On January 2, 2024, Kim Zimmer asked Michele about the SCPL IT Proposal listed on the JA Council agenda and Eric sent [this reply](#) where he stated:
"We want this to be out in the open, so it is on the JA agenda, and will also be on the MVLS agenda in January. It is a developing situation, so at this point there are no details, just the general concepts. At this point it amounts to an explanation of why we are, so far, saying no."

Assistant Library Director Devon Hedges was on that email reply as a member of JA Council and forwarded it to me so I was aware of the conversation. Devon then received [this email](#) from Eric accusing him of being untrustworthy for sharing the email, and I received [this one](#) where Eric stated:
"This is very similar to the fine block threshold issue. Schenectady lost that fight, and lost the respect of the other libraries, because there was too little attention paid to the views – right or wrong – of the other libraries. They were not listened to and respected, not courted as allies, and so they easily became – and remain - opponents."

Other MVLS library directors have not acted or spoken as if they are SCPL's opponents, and have repeatedly demonstrated support and understanding for us doing what is best for our library and the community we serve despite the disruption it's causing and difficulty we all face during this process.

As a result of this email discussion, we came into the January meeting aware they intended to say no to us managing our own IT and that there was a high likelihood we'd need to withdraw in order to proceed with our plans to improve library services.

The meeting with SALS/MVLS/JA was held **on January 25**. Attendees included SCPL staff, JA staff, MVLS Director Eric Trahan, SALS Director Sara Dallas, Schenectady County Legislator Haileab Samuel, SCPL Trustee Madelyn Thorne, Schenectady County Manager Rory Fluman and Schenectady County IT staff including Laura Baker. A summary of the key points of the discussion is as follows:

- SALS/MVLS/JA feels it's an issue to have county IT staff provide our IT as opposed to dedicated library staff. After several vague statements about risk and access, with much probing and asking of clarifying questions they stated their concern is if county IT staff support us and manage our network, 1) they may see Polaris/patron data when troubleshooting our staff PCs (and this is different from library staff seeing Polaris/patron data because "they're a third party" and it doesn't matter if they sign off on all the same JA policies as library staff)
- When pressed on why it wouldn't be sufficient for county IT to agree to follow all JA security and privacy policies Michele stated because "it's different than any existing model" and she "isn't comfortable" with it
- SALS/MVLS/JA stated even if we had dedicated library staff providing our IT, they wouldn't allow us to fully manage our own IT, they would have to have access to our network and monitor our activity
- SALS/MVLS/JA would not budge on requiring us to use their email accounts in addition to any of our own we administer. They stated it is JA policy and when I asked if they would consider changing JA policy, Eric said no.
- Michele mentioned she wishes we had communicated that we were unhappy and when I mentioned a few key examples of things we've been talking to JA about wanting to change, she said we could do those things if we got our own IT, to which I replied "that's what we're trying to do right now"

On January 25 after the meeting, Eric [sent an email](#) to a group of MVLS directors excluding SCPL and stated:

"The meeting this morning between MVLS, JA, SCPL and Schenectady County representatives was productive in identifying paths forward for finding a new way for SCPL to work with JA. There is still a lot of work to do in navigating the details of that new way; but we seem to have acceptance that the way forward will be a scenario that does not differ in essentials from the existing JA relationships with the large JA libraries."

This was shocking and confusing to us (when someone on the email kindly shared it) because in our meeting with SALS/MVLS/JA they **flatly refused to budge on any of the fundamental issues** except the possibility of allowing county IT to provide support if we limited it to a handful of county IT employees instead of utilizing the services of the full team of county IT. When we asked if it made a difference if it was only 3-5 county IT employees instead of all of them, they said, "maybe". They were fully aware that our goal was to have access to the full and robust county IT team in order to attain our goals, so this only further frustrated any efforts for a compromise. When we requested a change in the email

requirement, a crucial consideration to us if we were to remain in JA, they said NO. When we requested to fully manage our own IT by either dedicated library employees or by county IT employees, they said NO. At no point did we indicate we were happy or accepting of pursuing a model “that does not differ in essentials from the existing JA relationships with large JA libraries”. We talked about some hypothetical ways to handle other issues of concern such as virtually networking our libraries together that would meet our needs and be acceptable to JA and concluded the meeting by saying we (SCPL) would need to discuss our next steps and how we want to proceed.

On January 26, 2024, Eric sent [this email](#) to SCPL Board President Madelyn Thorne and states: “Finally, and more directly related to the purpose of yesterday's meeting, it is, frankly, a bit silly for SCPL to hold its ability to leave the JA consortium as some kind of bargaining chip. The truth is exactly the opposite. If SCPL left the consortium, the consortium would go along just fine, as would the other 49 libraries and their users.”

After the meeting on January 25th, it was clear to all SCPL stakeholders who attended that MVLS/SALS/JA was not willing or interested in exploring the type of meaningful changes that would allow SCPL the flexibility and autonomy it needs to best serve its community while remaining a member of JA. The unwillingness to consider changing JA policy so that SCPL employees do not have to maintain and monitor two separate Office 365 accounts along with the statement that SCPL could never fully manage its own IT and JA would require full access to our network were two of the most critical dealbreakers. This lack of willingness to consider changing JA policy is indicative of the general philosophy and culture of no SCPL has experienced as a member of JA and found to be incompatible with SCPL’s need to continuously innovate and adapt to remove barriers to access and improve patron experience, and touches every aspect of SCPL’s operations, hindering our ability to operate effectively and efficiently. It was evident there was nothing productive to be gained from continuing to fruitlessly advocate for SCPL’s needs and it was not fiducially responsible to devote continued time, expense and resources to this effort past this point. The recommendation was made to the SCPL Board of Trustees to withdraw in order to move forward in pursuing strategic partnerships that effectively further the library’s mission of serving the community.

From: [Laura D. Baker](#)
To: [Thorne, Charity](#); [Largeteau, Michele](#)
Subject: MVLS meeting and followup
Date: Wednesday, May 17, 2023 11:30:08 AM

Caution: This email appears to have originated from outside the organization. Do not open attachments or click links from unknown or unexpected sources.

Morning Charity and Michelle,

This morning I met with the MVLS team to get some clarification on IT concerns at SCPL. After that conversation I feel strongly that we need to have an in-person meeting to get some clarification on things. There are a few things we can get started on before then. I've outlined the topics discussed below:

- Credit Cards
 - The OPAC takes credit cards with the addition of another online processor. Michelle is going to send the information so that we can get it into underwriting asap. Once that is in place, Jason from JA can assist in integrating into the SCPL OPAC
 - The Self Checks have a credit card reader that does require a separate drop to secure the read from the rest of the network. This is true of all County card readers in every department. Chris has offered to come to Schenectady to visit all the locations so we can map the best way to comply. We will most likely have to run some cabling, but if we choose placement properly we can minimize the cost.
 - Card readers at the desk - Per our conversation yesterday, I think we can drop this requirement and focus on the OPAC and self checks.
- LEAP
 - The Leap system can accomplish almost all tasks with the exception of acquisitions and serials. There will still be a need for the old interface until those items are incorporated.
 - Training is available through Sharon O'Brien at MVLS
- Office 365/Teams/Apps etc
 - SCPL employees are able to login to the local applications on their computers to get access to the desktop applications
 - All SCPL employees with A1 licenses are able to access teams either through the desktop app, phone app or website
- MFA
 - O365 MFA is available by request to the JA. This will MFA the web applications as well as the first time someone logs into the on-prem applications. **NOTE** that the on-prem applications should not be logged into on shared computers.
 - Access to Polaris/III can have MFA as well
 - Chris and Laura (County IT) will research a viable solution for the desktops that

will satisfy Cyber Insurance. As this will likely be a SCPL only solution, the management of it will fall to SCPL.

- Email for Trustees/Board members
 - JA cannot support the addition of Board members
 - The library can procure a separate system either through the county or on it's own that can be used for Trustee communications. County IT will make a recommendation here.

Thank you to you both in advance and I hope this information is helpful.

Can we throw out some dates/times that would work for a meeting in the next 3 weeks? Next week is no good for me, but June 6,7 or the week after that might work.

Laura

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

From: [Largeteau, Michele](#)
To: [Thorne, Charity](#)
Cc: ["Laura D. Baker"](#); [Mundell, Chris](#); [Thomson, Jason](#); [MacFarland, David](#); [O'Brien, Sharon](#)
Subject: Follow up from our 6/2/2023 meeting
Date: Friday, June 9, 2023 3:55:57 PM
Importance: High

Charity,

I wanted to write to follow up on our meeting last week. It was very good to meet with you and to get more information.

We have several projects that we want to work with you on and I wanted to say that it would not be practical, nor do I have the staff, to address them all at once. So, if we could review the list and set a priority order for them that would help me a lot. We will do our best to work through them as quickly as possible but we do have projects with other libraries and with the overall operation of our JA services.

I have the following items on the list, plus a few questions. Please let me know if I have them in the correct order by priority:

- VoIP phones – Laura Baker has indicated that this is your top priority. Chris Mundell and I will be meeting with her next week to see what can be done to improve your phone quality.
- Self-checks with credit cards at all branches – Can you update me on the status of the order? Has the order been placed? Do you have estimated delivery dates?
 - Chris will be reaching out to you very soon to approve the order of the routers needed and to set up walkthroughs with you and Ken (and anyone else that you would like involved).
 - Next any necessary wiring will need to be done to ensure that we have two drops for each self-check.
 - When the routers arrive, Chris will configure them and get them in place.
 - Once the networks are in place and the hardware arrives, Jason will work with Ken to get these installed.
- The rest of the RFID equipment – Our understanding is that the staff pads and gates will arrive around the same time as the self-checks. Jason will assist with the configuration and installation. As the sorter will arrive later, Jason will work with you when that arrives.
- Credit cards in the PAC – Jason has provided the information and is waiting to hear from you and/or Laura.
- We would like to review the Cassie settings and your needs for your public PCs and printing.
- Laura is interested in pursuing ways to provide MFA at the desktop to satisfy cyber insurance requirements. This may be with key device or there was discussion about Active Directory for your staff computers.

I wanted to mention that if you were to pursue a public PC management solution other than Cassie or using our standard public PC image (like you do at your non-Cassie branches), JA would not be able to provide support for them. We just do not have the staff to provide full support for another product. If you were to have your own IT staff, that would be something

they would need to manage. The same is true if you were to go with a different configuration for your staff PCs. Adding Active Directory for example, requires management and would be best if you had your own IT staff. If we are able to work with Laura to find an MFA option that works with our staff images without Active Directory, we are more than happy to help with that and would be able to continue to support them as we do now.

Please call me if you need to discuss any of this before getting back to me. Meanwhile we will continue working on the items above as I have indicated. Thanks!

Michele
~~~~~  
Michele Largeteau  
[mlargeteau@sals.edu](mailto:mlargeteau@sals.edu)  
Joint Automation Project Manager  
Southern Adirondack Library System  
22 Whitney Place  
Saratoga Springs, New York 12866  
(518) 584-7300      FAX (518) 587-5589  
~~~~~

From: [O'Brien, Sharon](#)
To: [Thorne, Charity](#); [Trahan, Eric](#)
Subject: RE: Polaris configuration - threshold at which account is delinquent
Date: Thursday, February 23, 2023 3:25:16 PM

So – I'm copying Eric here and will be forwarding a related email to this in a sec.... essentially when SCP went fine free last year, a policy was developed in a complete vacuum, which is where the \$100 came from. When we read the press release in the paper (because that's where we learned of the new policy) Eric met with leadership do discuss why the \$100 limit was not feasible in a consortial environment. I wasn't physically at that meeting so I will let him fill you in on details. But essentially that \$100 never should have gone through.

From: Thorne, Charity <cthorne@mvl.info>
Sent: Thursday, February 23, 2023 3:18 PM
To: O'Brien, Sharon <sobrien@mvl.info>
Subject: Polaris configuration - threshold at which account is delinquent

Hi Sharon,

I'm reviewing our Board circulation-related policies and discovered policy says we block physical borrowing privileges at balances of \$100 but apparently right now the actual block threshold is \$5. Can you tell me how I get that changed to match our policy? I'm not sure who I should contact but I know you'll know!

Best regards,

Charity Thorne (she/her)
Executive Director
Schenectady County Public Library
[99 Clinton St, Schenectady NY 12305](https://www.scpl.org/)
[518.388.4543](tel:518.388.4543)
<http://www.scpl.org/>

From: [O'Brien, Sharon](#)
To: [Thorne, Charity](#); [Trahan, Eric](#)
Subject: FW: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS
Date: Thursday, February 23, 2023 3:25:13 PM

See the highlighted text (far) below

From: Bradley, Karen <kbradley@mvls.info>
Sent: Monday, March 28, 2022 5:29 PM
To: Trahan, Eric <etrahan@mvls.info>; O'Brien, Sharon <sobrien@mvls.info>; debee52@gmail.com; DeMidio, Beth <bdemidio@mvls.info>; Hedges, Devon <DHedges@mvls.info>; Flood, Lisa <lflood@mvls.info>
Subject: Re: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS

Beth filled me in as I had to be at Niskayuna and Glenville. It sounds like it was very productive. Thanks to all!

Get [Outlook for iOS](#)

From: Trahan, Eric <etrahan@mvls.info>
Sent: Monday, March 28, 2022 5:27:41 PM
To: Bradley, Karen <kbradley@mvls.info>; O'Brien, Sharon <sobrien@mvls.info>; [debee52@gmail.com](#) <[debee52@gmail.com](#)>; DeMidio, Beth <[bdemidio@mvls.info](#)>; Hedges, Devon <[DHedges@mvls.info](#)>; Flood, Lisa <[lflood@mvls.info](#)>
Subject: Re: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS

Thanks, everyone, for the productive meeting this afternoon. Jason at JA will run the script to end the charging of fines at all SCPL locations on April 1. Many other more complex Polaris settings changes will have to be made at a later date, and these will require discussions and decisions made by SCPL staff in conjunction with Sharon and JA staff. SCPL will explore options for changing the settings for public computer access.

We agreed that the system-wide settings for Overdrive access cannot be changed, and that we all need to work on and come to a solution for the fee threshold for circulation blocks.

I want to reiterate that the important issue for me is that we all maintain respect for the consortium environment. For any library to deviate to far from norms creates issues for all other libraries, and while there are exceptions to most rules, the consortium can only be effective if all sites are transparent and working together.

We are happy to meet with you anytime to discuss additional issues or details,

Eric

From: Bradley,Karen <kbradley@mvls.info>
Sent: Monday, March 28, 2022 1:59 PM
To: O'Brien,Sharon <sobrien@mvls.info>; Trahan,Eric <etrahan@mvls.info>; debee52@gmail.com <debee52@gmail.com>; DeMidio, Beth <bdemidio@mvls.info>; Hedges, Devon <DHedges@mvls.info>
Subject: RE: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS

Yes, Lisa is here today and you are right in that Lisa will only be working Mondays for a while. Let me check with Beth on time. Lisa normally gets back from lunch at 2:00 pm.

From: O'Brien,Sharon
Sent: Monday, March 28, 2022 1:57 PM
To: Bradley,Karen <kbradley@mvls.info>; Trahan,Eric <etrahan@mvls.info>; debee52@gmail.com; DeMidio, Beth <bdemidio@mvls.info>; Hedges, Devon <DHedges@mvls.info>
Subject: RE: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS

I am available this afternoon. I know Lisa is working very limited hours in April, but believe she is working Mondays? If that is the case I hope she can be included.

From: Bradley,Karen
Sent: Monday, March 28, 2022 12:13 PM
To: Trahan,Eric <etrahan@mvls.info>; debee52@gmail.com; O'Brien,Sharon <sobrien@mvls.info>; DeMidio, Beth <bdemidio@mvls.info>; Hedges, Devon <DHedges@mvls.info>
Subject: Re: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS

We did speak with Sharon during the process who lent her expertise to us and identified the fact that Polaris would not be able to make changes in the short term and we would need to do things manually. I am copying Beth and Devin on this. Is anyone free this afternoon?
Get [Outlook for iOS](#)

From: Trahan,Eric <etrahan@mvls.info>
Sent: Monday, March 28, 2022 12:05 PM
To: Bradley,Karen <kbradley@mvls.info>; debee52@gmail.com <debee52@gmail.com>; O'Brien,Sharon <sobrien@mvls.info>
Subject: Re: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS

Hi Karen,

This is truly wonderful news. Congratulations on getting the county to take this radical step. I was very pleased to hear the county legislators speak so passionately and intelligently about the impact of library services on the community. This is a great accomplishment.

Of course, this is only the first step. Having gone through this process with 13 other much smaller and less complex libraries; there is a lot to be done to implement fine-free borrowing in all Schenectady locations. In fact, it is effectively impossible to do this implementation by April 1. That artificial deadline was set without SCPL getting any input from MVLS or JA. With all other libraries we were a part of the process, and worked with the libraries to set reasonable expectations and achievable solutions. I would very much rather not have to say: sorry, this can't be done; but unfortunately, that is where we are.

And there are other issues beyond the impossible schedule. **Some of the stipulations in your new policy are totally out of sync with the other libraries in the consortium. System-wide, borrowers lose access to Overdrive at \$5 owed. And \$100 is a complete outlier for a cutoff for losing borrowing privileges. No library is going to want to fill requests to SCPL that are going to borrowers with that kind of track record for not returning things.**

I don't like having to say no to libraries. I particularly don't like having to put the brakes on fine-free borrowing. But, for the sake of the 40+ other libraries - and frankly, for the sake of you and SCPL too - I am saying no to the two above examples. MVLS will not make any radical change to lost materials policies without buy-in from the other libraries.

Please get together your library circulation experts and schedule a call or meeting with Sharon and me. We are free most afternoons this week.

MVLS wants this to be a successful new era for you, your users and the community. We can only do that if we all work together.

Eric

From: Bradley, Karen <kbradley@mvls.info>

Sent: Friday, March 25, 2022 3:54 PM

To: Trahan, Eric <etrahan@mvls.info>; O'Brien, Sharon <sobrien@mvls.info>; Abbott, Wade <WAbbott@mvls.info>; Thomas, Helen <HThomas1@mvls.info>; Natalie Hurteau <natalie.hurteau@uhls.org>

Cc: Hedges, Devon <DHedges@mvls.info>; DeMidio, Beth <bdemidio@mvls.info>

Subject: Fwd: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS

We did it! There are no longer any MVLS libraries charging fines!

Thank you Natalie for your help with the material for Julie and to Sharon for the reports needed for our Trustees!

Get [Outlook for iOS](#)

From: Bradley, Karen <kbradley@mvls.info>

Sent: Friday, March 25, 2022 1:57 PM

To: Angela Tatem <angelatatem@gmail.com>; Bernice E. Rivera (bernice.rivera@nysut.org) <bernice.rivera@nysut.org>; Beth DeMidio <bdemidio@mvls.info>; blschworm@gmail.com <blschworm@gmail.com>; Cheryl Cufari <cufaric@gmail.com>; chuckyr29@yahoo.com <chuckyr29@yahoo.com>; David Fronk (davidfronk@aol.com) <davidfronk@aol.com>; debee52@gmail.com <debee52@gmail.com>; devon hedges <DHedges@mvls.info>; Haileab Samuel (haileab.samuel@scubeenterprise.com) <haileab.samuel@scubeenterprise.com>; Heather Gray <heathergray823@gmail.com>; Janice Martin <jmartin@mvls.info>; Joe Landry <joe.landry8@yahoo.com>; Julie Bean McDonnell <julie.mcdonnell@schenectadycounty.com>; Karen Bradley <kbradley@mvls.info>; Michelle Ostrellich <Michelle.Ostrellich@schenectadycounty.com>; Michelle Ostrellich <michelleostrellich@gmail.com>; patrick_carmel@hotmail.com <patrick_carmel@hotmail.com>; rmfine@gmail.com <rmfine@gmail.com>; Sara Mae Pratt <Sara.Pratt@schenectadycounty.com>; Sara Mae Pratt <saramaepratt@gmail.com>; scplfriendspres@gmail.com <scplfriendspres@gmail.com>; Sharon Jordan <sjordan10@nycap.rr.com>; Steven McCutcheon <stevenmccutcheon@gmail.com>; Tina Versaci <tinaversaci26@gmail.com>

Subject: FW: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS

Erin Roberts has just submitted sent the attached press release announcing last evening's vote to become fine free on April 1, 2022. The policy document is updated and online on our website.

I would like to thank the Fine and Policy Committee's work on this and our entire Board of Trustees for their support on breaking down another barrier that our community members have had in accessing library resources. There has never been a time that this has been more needed than now! Congratulations!

Erin will work with library Administration and Doug on some messaging and promotion ideas, next week. If anyone has ideas or want to be involved in any way, let me know.

Many logistical things have to happen at our end to make this happen by April 1, 2022. We have begun a draft of a staff information sheet to share out next week and get questions from the staff answered. It is impossible to predict every scenario, of course, so we will likely refine things throughout April. I am going to look at the Polaris reports and run one on March 31, 2022 to see where we are at with waives and auto-waives on library material, by branch and will do it once again at the end of April.

This is an exciting time for SCPL and our community!

From: Erin M. Roberts <Erin.Roberts@schenectadycounty.com>
Sent: Friday, March 25, 2022 1:10 PM
To: Erin M. Roberts <Erin.Roberts@schenectadycounty.com>
Subject: Press Release: Late Fines Eliminated at Schenectady County's Public Libraries Starting April 1 -- BYPASS

Attached.

Link: <https://schenectadycounty.com/news/late-fines-eliminated-schenectady-countys-public-libraries-starting-april-1>

Erin M. Roberts

Director of Public Communications

Schenectady County

(518) 388-4772

(518) 723-0570 (cell)

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

From: [Trahan, Eric](#)
To: [Thorne, Charity](#)
Subject: Re: Block threshold
Date: Wednesday, April 19, 2023 11:30:11 AM

Hi Charity,

My sense is that we need a little more communication with the member libraries before implementing. I will facilitate a discussion via email to give everyone a chance to weigh in. I'll propose that we do a trial-basis implementation of the \$100 block threshold, and await reactions. If a majority of directors are Ok with a trial implementation, that's fine with me.

Eric

From: Thorne, Charity <cthorne@mvl.info>
Sent: Tuesday, April 18, 2023 2:16 PM
To: Trahan, Eric <etrahan@mvl.info>
Subject: Block threshold

Hi Eric,

Thanks for suggesting that the block threshold at SPCL might be of concern to the other library directors. I found yesterday's discussion helpful. I am glad that the other directors had no major concerns, and they are also interested in hearing how this is going for SCPL at next month's meeting.

Given this, when is the soonest you would be able to update our block threshold so that we can begin collecting lessons learned?

Best regards,

Charity Thorne (she/her)
Executive Director
Schenectady County Public Library
99 Clinton St, Schenectady NY 12305
518.388.4543
<http://www.scpl.org/>

From: [Trahan, Eric](#)
To: [Thorne, Charity](#)
Subject: Re: Checking in on block threshold
Date: Thursday, May 25, 2023 4:28:43 PM
Attachments: [Central Library Draft Plan 2024.pdf](#)

Central Library draft Plan is attached. Let me know if it is OK with you, and sometime next week I'll send it out to the committee.

I am sorry for the foot-dragging about the fine block policy. There are several factors at work here. One is that I am not sure that the other libraries have actually answered the real question, which would go something like "is your library comfortable with another library in the system having a \$100 fine block limit"? And it's not that they all have to say yes. But if they all said no, that would be another thing.

Then there is what I think of as the JA guardrail issue. My view is that JA needs to implement many more standards - like the new User Account Policy. This is all just my opinion, but I think there should be common standards that all libraries agree to stay within. Of course, standards can change, but that shouldn't be done without consultation.

And that brings us to this specific SCPL policy. I have no objection to the policy. But I do have an objection to how it came about. It wasn't something the library staff carefully considered, in consultation with MVLS and JA, and then brought to the SCPL board. My understanding is that it was done at the whim of a board member (s?) with little or no consultation with SCPL staff and none at all with MVLS or JA. This kind of profound change should be controlled by existing (but currently non-existing) JA guardrails and should only happen after thorough consultation consideration. My hope is that establishing and amending standards becomes a new role of the JA Operations committee.

That said, I am fairly confident that after the DC meeting on Wednesday we can change the settings in Polaris and begin finding out the real ramifications.

Eric

From: Thorne, Charity <cthorne@mvls.info>

Sent: Thursday, May 25, 2023 2:23 PM

To: Trahan, Eric <etrahan@mvls.info>

Subject: RE: Checking in on block threshold

Congrats to your daughter, that's a big achievement!

I'm a little confused about the block threshold matter – none of the replies talked about ways SCPL's policy change might be detrimental to other member libraries, can you help me understand the obstacle to implementing our Board-approved policy at this point?

I'll be on the lookout for the Central Library Services stuff later today.

From: Trahan, Eric <etrahan@mvl.info>
Sent: Tuesday, May 23, 2023 4:03 PM
To: Thorne, Charity <cthorne@mvl.info>
Subject: Re: Checking in on block threshold

Hi Charity,

I apologize for being slow in getting back to you about this. My youngest daughter's college graduation was last weekend, so I have been away and distracted.

I did compile all of the responses to the email discussion - see attached. At this point it seems best to wait for the meeting. I expect that after that we can implement on a trial basis and see what happens.

I am also working on some options for central library funded services in 2024, and will get back to you with a draft on that by the end of Thursday. It includes the things we discussed at the meeting.

Eric

From: Thorne, Charity <cthorne@mvl.info>
Sent: Thursday, May 18, 2023 2:57 PM
To: Trahan, Eric <etrahan@mvl.info>
Subject: Checking in on block threshold

Hi Eric,

It's been about four weeks since we posed the question of concerns about SCPL's block threshold to the mvl-directors list and I just wanted to check in on when we can expect the configuration to be updated to match our policy? I'd like to be able to update the group at the next directors' council meeting, even if it's only a week or two of official lessons learned at that point.

Best regards,

Charity Thorne (she/her)

Executive Director

Schenectady County Public Library

99 Clinton St. Schenectady NY 12305

518.388.4543

<http://www.scpl.org/>

Re: Block threshold policy at SCPL

🔗

Acklin, Valerie

🔗

- **mvls-directors (All directors at all MVLS libraries)**

Cc:

• O'Brien, Sharon
Wed 4/26/2023 10:07 AM

What Kim said.

The jump to \$100 would be a tough one for us. But totally agree that 5 bucks is ridiculous. And, y'know, maybe the dollar-based metric has had its day, as Eric pondered.

I'll be discussing all this over the next couple of weekly staff meetings and will bring thoughts and ideas to the next DC meeting (the date of which is TBD -- watch for an email asking about date/time availability).

Best,
Valerie Acklin
Library Director
Gloversville Public Library

Block threshold policy at SCPL

🔗

ZK

Zimmer, Kimberly

🔗

- **mvls-directors (All directors at all MVLS libraries)**

Cc:

• O'Brien, Sharon
Wed 4/26/2023 10:01 AM

Thanks Eric for getting this conversation on standards started.

I agree that a block is a reminder that something needs to come back and maybe it is just training staff to mention it once the amount is raised.

I agree that the 5.00 threshold needs to change, I am not sure 100 is my first choice. I would also be interested in discussing the number of items vs. the \$ amount.

I look forward to hearing how it is working out at SCPL.

Kim

RE: Block threshold policy at SCPL

🔗

B

Burnett,Michael

To:

• Trahan,Eric

Tue 4/25/2023 7:50 AM

I think it is very interesting that people don't wish to make others responsible for their actions, follow the rules, and be punished for breaking the rules.

Now, I bet I just lost 85% of those reading this.

If an adult loses one book, his/her acct should be blocked and closed until a decision is made as to how this can be rectified. See, at a small library (knowing everyone) that rectification could come about in a variety of different ways: pay the full price, give me \$10, renew it and keep looking, forget about it as it was in need of replacement, etc...

A juvenile that loses a book involves a bit more finesse, but many of the options above are still in play. (often taking in account his/her home life/parents)

We have no fines/overdues, but do have our Fine Jug that allows those with generous or guilty hearts to give money.

Yet, the further issue is that many of the libraries operate differently. Cash or credit; self-check-out or staff, one person or multiple staff members on desk, etc.. These are factors that influence each library's management and thus this issue before us now.

Re: Block threshold policy at SCPL

🔗

TH

Thomas, Helen

• Trahan,Eric

Mon 4/24/2023 4:07 PM

The number of books as a criteria is problematic for me because an audiobook or two would be substantial while two scholastic children's books would be negligible. For that reason, I would lean toward a dollar amount. This is actually quite a challenge. The people who lose or don't return our books tend to be people who have moved away.

As you know, we have a very active story time and moms come in with their hands full of books and children. Many times they have left one or two home, but they still want to take books out. I am always anxious to see children get the books they want. I think \$50 is a reasonable amount. That would allow for this contingency.

Helen I. Thomas
Director
Sharon Springs Free Library

Re: Block threshold policy at SCPL

🔗

T

Trahan, Eric

To:

- Thorne, Charity;
- **mvls-directors (All directors at all MVLS libraries)**

Cc:

- O'Brien, Sharon

Mon 4/24/2023 9:04 AM

Here are some thoughts that I hope will get a more general discussion going.

Just as we now have uniformity in all MVLS libraries being fine-free, it would, I think, be advantageous to have less variability in other rules for library use. Currently, the fine block threshold at MVLS/SALS libraries ranges from \$5 to \$50. The fact is, \$5 no longer makes much sense: it is just a leftover from when libraries did charge fines. \$50 basically means that a user can have 2 lost items (standard hardcovers) and still borrow with no block coming up at checkout. A \$100 fine block threshold increases that to 4 lost items.

Of course, this is all related to the ability of circulation staff to override blocks at checkout. At SCPL, blocks at checkout can be more disruptive since much of their circulation happens at self-check machines. But blocks can be very useful as reminders to patrons and staff about borrowers' status.

What do you think? Should we set a range of acceptable fine block thresholds? Should \$5 be OK? Should \$100 be OK? Should we all work toward having more uniform rules?

And there is more! Is a \$-based block the best option we have? What about number of items lost? Is there a meaningful distinction between overdue and lost? Does it matter how long they are overdue? What kind of standards should we have as a system and as a consortium with SALS?

Feel free to reply all with your thoughts.

Eric

From: Thorne, Charity <cthorne@mvl.info>

Sent: Thursday, April 20, 2023 8:15 PM

To: mvl-directors (All directors at all MVLS libraries) <mvl-directors@mvl.info>

Subject: Block threshold policy at SCPL

Hi all,

In keeping with their desire to remove barriers to access and avoid punitive financial penalties, my Board of Trustees decided to change their policy to block library cards from use at a \$100 balance instead of \$5. I've heard other MVLS member libraries may have concerns about this policy change at SCPL and I'm reaching out to hear what challenges this might present for you, so please let me know. We're hoping to be able to share how it's going for us at the next MVLS Director's Council (and many thanks to those of you who shared already after I posed this question at the recent one on Monday!)

Best regards,

Charity Thorne (she/her)

Executive Director

Schenectady County Public Library

99 Clinton St, Schenectady NY 12305

518.388.4543

<http://www.scpl.org/>

From: [Trahan, Eric](#)
To: [Tina Chericoni Versaci](#); [Thorne, Charity](#)
Subject: Re: Block threshold
Date: Friday, July 28, 2023 11:40:31 AM

Hi Tina,

The answer to "which libraries objected" is easy: it is "all of them." The issue was discussed a couple of Director's meetings, and the typical reaction was in the vein of "\$100! That's outrageous!"

The question of what they are objecting to is a bit more complex; but it really comes down to two things: stewardship and a resistance to change.

The stewardship angle is the library's desire to protect the public assets that they are entrusted with. So a library would say, "what's the difference between letting a borrower not return \$99 worth of materials and just letting them walk out the door with them without checking them out?"

Now, you might say why should other libraries care what you choose to do at SCPL? That has to do with the way the consortium works. SCPL policies aren't the policies for what happens to SCPL patrons and materials. They are the policies for what happens at SCPL locations. And what happens at SCPL locations can and does involve other libraries' materials and patrons. This means the issue of scale also comes in. To the smallest libraries, \$100 is a lot of money.

But I think the resistance to change is a bigger factor here. The other library's typical reaction above is related much more to the degree of change than to the change itself. You went from \$5.00 to \$100.00 all at once, without any warning or explanation. So libraries responded with "Yikes! What is going on?" In this change, SCPL is the leader. When you are the leader, you get pushback. Nobody said anything when you went fine free because you were the last MVLS library to go fine free. But with this change SCPL is pushing the envelope.

I can easily say yes to \$49 because that seemed to be the consensus among the other libraries. I expect many of them to start raising their limits; and for the general trend to be in that direction.

Eric

From: Tina Chericoni Versaci <tinaversaci26@gmail.com>
Sent: Thursday, July 27, 2023 5:01 PM
To: Trahan, Eric <etrahan@mvls.info>
Subject: Re: Block threshold

Caution: This email appears to have originated from outside the organization. Do not open attachments or click links from unknown or unexpected sources.

Eric,

Thanks for your quick reply. I really appreciate your perspective. I am glad to hear that you are

willing to meet us halfway until we can get this resolved.

In the meantime, I would be very interested to know and understand which member libraries are the obstacle and what their objections are since that's never been clearly articulated (at least to me). With this information in hand, we can better explain our objectives and address their concerns. We feel very strongly about the No Fine policy that we have implemented and we are seeing real progress in terms of access. As such, we are very incentivized to resolve any issues that are subverting or watering down the intent of the policy.

I look forward to continuing this conversation - with Charity of course, in the mix!

Tina V.

On Jul 27, 2023, at 4:06 PM, Trahan, Eric <etrahan@mvl.info> wrote:

Hi Tina,

I am glad to see this moving forward. I do want to make clear that the hold up isn't MVLS or JA. It is the other member libraries. When libraries want to make changes that affect other participants in the consortium, they don't so much have to convince staff at MVLS or JA, they have to convince a majority of the other 55 member libraries. Sometimes that is hard. Sometimes the consortium is frustrating and unwieldy, But it is worth it, for two reasons. One is, of course, money. No library could do the technology, delivery and resource sharing, etc. for what the systems cost. But even more than that, the resources that become available could not be accessed for any amount of money. SCPL - the biggest library in the consortium - has holdings of about 325,000. Through JA, you have access to over 2.3 million items. You really can't put a meaningful price tag on that.

And actually, the trend is toward expanding the consortium. We recently did that for Overdrive/Libby. Borrowers now have access to all resources in 15 counties between Putnam way down the Hudson Valley to Hamilton and Warren Counties. It took a long time because finding common standards that all of those libraries and systems would accept was a challenge: a challenge that is well worth the necessary compromises.

Thanks for working with us on this,

Eric

From: Tina Versaci <tinaversaci26@gmail.com>

Sent: Thursday, July 27, 2023 3:21 PM

To: Thorne, Charity <cthorne@mvl.info>

Cc: Trahan, Eric <etrahan@mvl.info>

Subject: Re: Block threshold

Caution: This email appears to have originated from outside the organization.

Do not open attachments or click links from unknown or unexpected sources.

Charity,

Thank you for staying on top of this matter.

This issue is of utmost importance to our Board as we have been hearing many complaints about this inconsistency. I feel that when we explain the reason for the hold up, it does not reflect well on MVLS or JA.

Eric, we are grateful for your partnership and look forward to your help in advocating for us on this issue!

Fondly,

Tina Versaci

Sent from my iPhone

On Jul 27, 2023, at 2:36 PM, Thorne, Charity <cthorne@mvls.info> wrote:

Hi Eric,

I'm checking in on how we can make some meaningful progress towards implementing our Board-approved policy regarding the dollar amount at which SCPL patrons are blocked from checking out? At this point there have been numerous discussions in numerous ways and it's not clear to me how we can effect change other than maybe getting our own ILS! Would you reconsider at least setting our configuration to \$49 like Saratoga's to get us halfway there? I had asked Sharon about this months ago and she declined to make the change since she doesn't want to do it twice. Please let me know.

Best regards,

Charity Thorne (she/her)
Executive Director
Schenectady County Public Library
99 Clinton St, Schenectady NY 12305
518.388.4543
<http://www.scpl.org/>

If you believe you have received this message in error or do not wish to receive this information via email, please reply to this message.

To report this message as spam or offensive, please send e-mail to abuse@sals.edu including the entire contents and subject of the message.

It will be reviewed by staff and acted upon appropriately.

If you believe you have received this message in error or do not wish to receive this information via email, please reply to this message.

To report this message as spam or offensive, please send e-mail to abuse@sals.edu including the entire contents and subject of the message.

It will be reviewed by staff and acted upon appropriately.

From: [Thorne, Charity](#)
To: [Trahan, Eric](#)
Cc: [Tina Versaci](#)
Subject: RE: Block threshold
Date: Friday, August 18, 2023 4:29:27 PM

Hi Eric,

My apologies for the delay, this week has been extra hectic. I appreciate you following up and keeping this at the forefront.

The \$49.99 was a concession on our part temporarily given the refusal to change it to the \$100 our Board has set. We are perfectly happy to have it changed only once (to \$100) if it's so labor intensive and the fees we pay to Joint Automation don't cover changing this Polaris setting more than once every several months. Unfortunately I can't commit to stop doing my best to implement the Board's policy of \$100. The Board has affirmed their desire for the block threshold to remain as they set it when they went fine free in 2022.

I'm also unclear on the obstacle to implementing the \$100, despite your email explanation to Tina. You told me several months ago you were confident we would be able to implement it "on a trial basis" after just one more discussion with other member library directors, and no progress was made after that discussion. We offered to alleviate any outsized financial impact caused to other member libraries by covering the replacement costs of long overdue items borrowed by our patrons (which would surely incentivize us to reconsider the \$100 if we found there to be a large financial burden associated with the increased threshold). After yet another meeting with other member library directors in June, Devon informed me of your intention to conduct some type of poll related to our policy. I'm unsure what specifically the poll was intended to address and it has not happened as far as I know. I'm unsure how the other member library objections (that only seemed to surface on the third round of discussion) are significant here when we've offered to make them whole if their fears end up well founded.

I've been dismayed to find our membership in this cooperative the biggest challenge I'm facing so far in improving efficiency, productivity and customer service to our community. I have not encountered anywhere near this level of constraint and insistence on controlling individual library policy and procedure as members of other library cooperatives, systems, and consortiums, some of which have been considerably larger and had more complexities to consider. Our participation in Joint Automation seems more of a detriment than a benefit. I would love to find a way to adopt a more solutions-oriented approach to working together and am open to any suggestions you have that address the (so far hypothetical) problems caused by SCPL having a \$100 block threshold.

Best regards,

Charity Thorne (she/her)

Executive Director

Schenectady County Public Library

99 Clinton St. Schenectady NY 12305

518.388.4543

<http://www.scpl.org/>

From: Trahan, Eric <etrahan@mvl.info>
Sent: Thursday, August 17, 2023 8:56 AM
To: Thorne, Charity <cthorne@mvl.info>
Subject: Fw: Block threshold

Hi Charity,

Did you have any requested changes before this goes through?

Eric

From: Trahan, Eric <etrahan@mvl.info>
Sent: Monday, August 14, 2023 11:20 AM
To: Thorne, Charity <cthorne@mvl.info>
Subject: Re: Block threshold

Hi Charity,

Ok, we are moving forward.

Just to be clear - because this all gets seriously complicated - we (Jason at JA) will be changing the 2nd level fine block threshold for all material types and all patron codes at all SCPL locations to \$49.99; meaning that the block will be implemented if a patron has a total amount owed of \$50.00. \$49.99 will not trigger a block. Just FYI, that description is an indication of why it gets complicated and why Jason has to do it: it involves multiple changes in many tables in the back end of the database.

Because it is something that is time consuming, it is not something that we want to change lightly, or often. That is just another way of saying that when we make this change - and it should happen this week - the expectation is that the new setting will be "real". Meaning that the routine response to a patron owing \$50.00 or more will be that they need to get that value below \$50 before they can borrow other items; and that SCPL is not going to immediately begin lobbying to have the threshold increased to \$75.

Of course, I recognize that there will be many times when the appropriate customer service response will be to override the block, and that SCPL is fully within its rights to ask for another increase in several months to a year. Frankly, I think every library should give nearly all users the benefit of the doubt, and should regularly - at least every couple of years - review all of these settings.

Sound OK to you?

Eric

From: Thorne, Charity <cthorne@mvl.info>
Sent: Friday, August 11, 2023 9:06 AM
To: Trahan, Eric <etrahan@mvl.info>
Subject: RE: Block threshold

Yes, please do implement the \$49. The Board is supportive of setting the block threshold at \$49 as progress towards their intended policy of \$100 as I had requested on 7/27; Tina shared that you had agreed to make that change at the Board meeting that day.

From: Trahan, Eric <etrahan@mvl.info>
Sent: Thursday, August 10, 2023 9:26 AM

To: Thorne, Charity <cthorne@mvl.info>

Subject: Block threshold

Hi Charity,

We apparently had a misunderstanding. Sharon was waiting for notice that the SCPL Admin and Board was in agreement for setting the block threshold for all SCPL sites at \$49 before she starts that process. Can you confirm that is what you and the board want? She had a query from Devon asking about \$100; so we aren't sure where we are.

Just let me know. We can implement the \$49 if that is what you want.

Thanks,

Eric

From: [Trahan, Eric](#)
To: [Thorne, Charity](#)
Cc: [Hedges, Devon](#); [Tina Versaci](#); [O'Brien, Sharon](#); [Acklin, Valerie](#); [Zimmer, Kimberly](#); [Trahan, Eric](#)
Subject: SCPL fine block threshold
Date: Monday, August 21, 2023 12:26:24 PM

Hi Charity,

There appears to be - still - a fundamental misunderstanding as to why SCPL's request to raise the fine block threshold from \$5.00 to \$100.00 has not been implemented. That reason is that the other libraries are unanimously and ardently opposed to the concept of any library in the consortium having a threshold that allows patrons to steal \$99.99 worth of public assets with impunity. MVLS/JA has every responsibility to respect that ardent and unanimous objection.

SCPL's response to the other library's concerns has, so far, totally missed the mark. Yes, the SCPL board made the decision, and has since reiterated that decision. Yes, the decision comes from a laudable effort to remove a barrier to access. Yes, the offer was made to make restitution to libraries that are disadvantaged by the proposed SCPL policy; that offer being: "if you bill us, we will pay." Never mind that there isn't a reasonable mechanism for libraries to produce those bills. The bottom line is that none of this is effectively answering the other libraries' objections.

It seems to me that the only way to answer the other libraries' concerns is to provide evidence that a \$100 fine block threshold is not unreasonable. You could do that by providing data and examples showing that libraries that have implemented such policies have not experienced the negative results that the other libraries fear. Are there examples that SCPL is using in pursuing a \$100 fine block threshold?

Now, I want to address your frustration with working within the JA consortium. In a way, I understand, because 25-30 years ago I was a library director that was chafing under the policies and procedures of JA. There was a good reason for my frustrations: my library was different from the other fully automated libraries. We were smaller and much more distant from Saratoga; and in those days - before DSL, fiber, and hosting - distance made a big difference. It took years of working through the JA Council, with my providing lots of data and examples; but I did eventually get the changes I was looking for.

I think, similarly, that SCPL's frustrations with JA sometimes are a function of your difference. It isn't your fault, but SCPL has always worked with JA as a (very) large library using the "small library" plan. Libraries like CPH and SAR do have more (but not unlimited) freedom; because they have robust technology departments. So they are exempt from some rules on workstations, etc. But that still doesn't mean they can do whatever they want with no regard for the other members of the consortium. The JA policies and rules exist for a reason: and SCPL regularly provides evidence for those reasons. Your recent VoIP phone wiring debacle

provides a perfect example: if you had just done it with JA to begin with you wouldn't have had a debacle. Unfortunately, nearly every SCPL building project provides similar examples of the reasons for JA rules and procedures.

Of course, it is perfectly appropriate for policies, rules, etc. to change over time. And the way that change is accomplished is through the JA Council. The recent approval of the User Account Policy is a good example. A couple of years ago it became apparent that some libraries were being negligent, and putting data security at risk, by keeping accounts open inappropriately. So a policy was developed to address that problem. Yes, that policy introduced controls that some libraries, including SCPL, had to implement procedures to address. But it is for the benefit of all. The survey that you mentioned is the beginning of potentially developing additional policies to set guidelines for library settings concerning borrowing, fines, and fees, etc. That is how change is accomplished and implemented in the consortium.

Now, back to the fine block threshold. MVLS is agreeing to ask JA to increase the SCPL 2nd level fine block threshold to \$49.99. As already stated, we can do that because a threshold at that amount is acceptable (for some, barely acceptable), to the other MVLS members of the consortium. Again, this reiterates that this is not MVLS or JA setting unreasonable rules. It is taking appropriate account for the will of the members.

I acknowledge that you and the SCPL board see this as an interim step and that you will continue to advocate for a \$100 threshold. That's fine. I hope I have made it clear that the only way for you to effectively accomplish that advocacy is to provide data and examples for the other member libraries.

Eric

From: [Thorne, Charity](#)
To: [Largeteau, Michele](#)
Cc: [Trahan, Eric](#)
Bcc: [Tina Versaci](#)
Subject: RE: TBS demonstration invitation
Date: Monday, October 2, 2023 9:08:36 AM
Attachments: [MyPC-PaperCut System Requirements.pdf](#)

You're more than welcome to send folks to attend the demo. We're in the very early stages of exploring this as a potential solution right now, and I'm aware JA won't support anything other than Cassie and that there may be constraints from the JA end with regards to configuration. I did get some system requirements from Mick that I'm attaching here in case they're helpful for you to review at this point. If we end up deciding to go this route and find it's not compatible with JA's requirements, that would certainly factor into our continued consideration of what the best IT and automation solution for us looks like.

From: Largeteau, Michele <mlargeteau@sals.edu>
Sent: Thursday, September 28, 2023 1:11 PM
To: Thorne, Charity <cthorne@mvl.info>
Cc: Trahan, Eric <etrahan@mvl.info>
Subject: RE: TBS demonstration invitation

Charity,

We would like to remind you to always include JA staff when considering products that interact with Polaris or are related to PC hardware, software or networks. We would always want to be sure the product will work with Polaris, follow our security requirements and will work with the current PC and network setups.

It looks like TBS has products for printing, scanning, mobile printing etc. as well as PC management.

Please remember that JA supports Cassie for PC management and does not have the resources to support an additional product. We believe this was discussed when JA staff and Sharon met with your staff and county staff in June, as well as in the follow up message from Michele. For Schenectady to use anything other than Cassie or the standard JA public PC image (which you use at your non-Cassie branches) for public PCs, JA would be unable to support them. JA will assist with any interaction with Polaris for authentication, but would not be able to assist with the setup and ongoing support. JA requires a secure connection to Polaris for authentication, using either the Polaris API or SIP over SSH.

Because of the interaction of this software with Polaris and to respond to any technical questions from TBS or other libraries, JA would like to send three staff to attend the demonstration. We would also take that opportunity to show our new staff person Jesse Jensen around the library in preparation for the upcoming RFID upgrades.

Please let us know if you would like to discuss any of this further. Thanks!

Eric and Michele

From: Thorne, Charity <cthorne@mvls.info>

Sent: Thursday, September 28, 2023 9:04 AM

To: mvls-directors (All directors at all MVLS libraries) <mvls-directors@mvls.info>; sals-directors (All directors at all SALS libraries) <sals-directors@sals.edu>

Subject: TBS demonstration invitation

Hi all,

We've scheduled an on-site demonstration from TBS (<https://tbsit360.com/>) of their entire suite of products (PC/print management, print/copy/scan/fax equipment, etc.) at our Central Library next Thursday, October 5 from 10:30-12:30. I've used their products before at other libraries and their [Scan EZ station](#) especially is the best patron and staff experience I've found working in more than half a dozen public libraries across four states. If any of you are interested in attending the demo, you are more than welcome – just let me know you're planning to come so I can have a rough head count.

Best regards,

Charity Thorne (she/her)

Executive Director

Schenectady County Public Library

99 Clinton St, Schenectady NY 12305

518.388.4543

<http://www.scpl.org/>

From: [Laura D. Baker](#)
To: [Largeteau, Michele](#); [Trahan, Eric](#)
Cc: [Thorne, Charity](#); [Rory Fluman](#); [DeMidio, Beth](#)
Subject: Schenectady County Library IT Plan
Date: Thursday, November 9, 2023 2:41:07 PM

Caution: This email appears to have originated from outside the organization. Do not open attachments or click links from unknown or unexpected sources.

Dear Michelle & Eric,

As you are aware Schenectady County Library is moving under the purview of Schenectady County IT. The library would like to get to a point where they are relying on the JA for support of the ILS only and the rest is handled by County IT. It is a large undertaking and something we would like to move quickly on so we don't have the department in limbo between who to call for support.

This is the plan outline we discussed internally.

1. Move the scpl.org domain from it's current registrar to the County. We know the library can initiate the transfer, but we need to know where to point the DNS to keep the website active once that is completed. **This is something we would like to do as early as next week.**
2. The county will provision user accounts for all library staff in our Office 365 tenant. Once the accounts are setup, the library would like to move their files and pertinent email from the JA tenant over to the County tenant. The County will assign @scpl.org email addresses to all users. Once they are ready they will put out of office notifications on their @mvls.info email indicating the change and notify JA to decommission the office accounts.
3. The County will then start the process of replacing network equipment at each location. Each location will be getting a firewall, new switch gear and wireless APs. With this we will need to ensure access to Polaris and Leap and any other IP filtered service.
4. We plan to create new staff PCs that will be installed after the network is in place. The machines will be connected to the County domain and users will be logging in with unique credentials and using MFA. We will be returning to JA that hard drives from existing staff computers and then rebuilding them to the County image and make them ready to deploy to another site. It would be helpful if the JA could share any special configuration needed to make the staff PCs work with Polaris and the RFID equipment.
5. We then move on to configuring new public PCs. We will need control of the Cassie installation and server at this point as well for any branch running it.

Once complete we expect to be able to direct the library staff to the County IT helpdesk for anything other than an issue with the Polaris ILS.

We would need to know if there is any equipment that is not owned by the County library that

we are not aware of or if all the equipment belongs to us. We know there are licenses that we will not have access to, but are any transferrable that we already paid for. Deep Freeze for example.

JA will still have attended access through GoToAssist when someone needs support, but no longer unattended access. That will come through the County helpdesk.

We hope to work along side JA to assist in testing our imaging with Polaris. We will be employing the EDR and various firewall filtering for ssl inspection, web filtering, etc and will need to be sure it doesn't stop processes that need to be allowed through.

Thank you in advance for your assistance in this transition.

Best,
Laura Baker

Laura D. Baker
Chief Information Officer
Schenectady County
laura.baker@schenectadycountyny.gov
518-388-4705

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

From: [Trahan, Eric](#)
To: [Thorne, Charity](#); [Largeteau, Michele](#); "[Laura D. Baker](#)"
Cc: [O'Brien, Sharon](#)
Subject: Re: Schenectady County Library IT Plan
Date: Wednesday, January 3, 2024 1:00:38 PM

We can meet on Tuesday 1/23, Thursday 1/25, or Wednesday 1/31. Concerning the location, we are happy to come to the library if that works better for you. We don't see any reason to meet in a location other than the library or the system.

Let us know what works for you,

Eric

From: Thorne, Charity <cthorne@mvls.info>
Sent: Tuesday, January 2, 2024 12:23 PM
To: Largeteau, Michele <mlargeteau@sals.edu>; 'Laura D. Baker' <laura.baker@schenectadycountyny.gov>; Trahan, Eric <etrahan@mvls.info>
Subject: RE: Schenectady County Library IT Plan

Apologies for the delay – between illness and holidays, we've been swamped. What is your availability for a meeting in the last two weeks of January? We'd like to meet at the county office building, as the county manager wants to join us.

From: Largeteau, Michele <mlargeteau@sals.edu>
Sent: Tuesday, December 12, 2023 10:09 AM
To: Thorne, Charity <cthorne@mvls.info>; 'Laura D. Baker' <laura.baker@schenectadycountyny.gov>; Trahan, Eric <etrahan@mvls.info>
Subject: RE: Schenectady County Library IT Plan

Charity and Laura,

We would like to schedule a meeting in January to continue this discussion and work through the issues surrounding your requests. We feel we would be able to make better progress in person rather than in email.

If you could send some possible dates and times, we would be happy to host the meeting at the MVLS location.

Thanks!

Michele

From: Thorne, Charity <cthorne@mvls.info>

Sent: Friday, December 1, 2023 2:05 PM

To: Largeteau, Michele <mlargeteau@sals.edu>; 'Laura D. Baker' <laura.baker@schenectadycountyny.gov>; Trahan, Eric <etrahan@mvls.info>

Cc: 'Rory Fluman' <Rory.Fluman@schenectadycountyny.gov>; DeMidio, Beth <bdemidio@mvls.info>

Subject: RE: Schenectady County Library IT Plan

Good afternoon,

Please see our compiled responses below.

From: Largeteau, Michele <mlargeteau@sals.edu>

Sent: Monday, November 20, 2023 8:51 AM

To: 'Laura D. Baker' <laura.baker@schenectadycountyny.gov>; Trahan, Eric <etrahan@mvls.info>

Cc: Thorne, Charity <cthorne@mvls.info>; 'Rory Fluman' <Rory.Fluman@schenectadycountyny.gov>; DeMidio, Beth <bdemidio@mvls.info>

Subject: RE: Schenectady County Library IT Plan

Laura and Charity,

We have reviewed your proposal for County IT taking over the local IT support for the library. We'd like to share some initial information and request more details for much of the plan.

In order for SCP staff to use the Polaris ILS and associated services, they will need to keep their MVLS/SALS user accounts and @mvls.info email addresses. These emails are necessary for our required communications, training and Security Policy tracking. We understand that the library will be moving to the Schenectady County Office 365 tenant for email and other Office 365 products. Please note MVLS/SALS email accounts cannot be auto-forwarded to any external mail system.

While we do not allow forwarding either, we do allow for external contacts to exist in our GAL for the purpose of communicating with staff who work for the County, but obtain Email from other organizations. The purpose of putting the library on the County O365 tenant is to allow them to eventually take advantage of our SSO integration when the staff computers are placed on the County's domain. We also have KnowBe4 training that is mandatory as well as comprehensive Security Policies that have to be in place.

For security and retention we employ a mail filter that allows staff to review their own quarantines and an archiving system.

We would like to streamline this to fit our existing network for support purposes. It's not practical for us to have staff checking 2 accounts as that will cause confusion and things will get missed. We are happy to provide you with documentation of our training and security measures to show we are doing what's required. Would you reconsider requiring us to maintain and monitor an additional email account through you so we can move forward with this? If not, unfortunately we will need to reconsider our membership in Joint Automation entirely.

Could you please provide more information about your plans for the networks, as this is a large part of the proposal?

We would like to better understand your plans for the staff network setup and configuration, including how they would be connected to the county network, if that is your plan. JA is responsible for the security of the ILS and have strict rules and controls over where and how the ILS can be accessed. We would need to understand the plan for each of the branches. Please include plans for segmenting the staff network from the other networks at each branch for credit cards, public computers and wireless access. Please note that the library owns the Meraki wireless hardware and licenses.

Our plan is to replace all of the existing equipment with County owned equipment. We would be placing a firewall on each ISP line coming into any location. If the line is shared between staff, public, wireless, service and credit cards, 3-5 firewalled VLANs are to be created at the Fortigate with access rules that don't allow traffic to cross them, and only allow those segments to access what is required on the internet.

Staff computers will be joined to the County network and added to the Domain via site to site VPN. This will enable MFA, SSO and our policies to take effect. The County requires computers to have unique users logins and no shared accounts. Users are not allowed to be administrators on their machines. Desktop computers and laptops are required to have bitlocker installed on at the BIOS level. The updates to systems are handled by centralized patch management software. All computers on the County network are required to have EDR installed. All of our devices are monitored by a SIEM and alerted come to the IT department. All devices will be MAC filtered. Wireless staff networks will use Radius for access.

We are happy to work with JA to review security requirements are met by both parties.

We would also like to understand your short and long term plans for the public computers. The library currently has Cassie at three sites and uses the JA public lockdown for the other sites. What would be your short term and long term plans for supporting those computers?

Public computers will no longer use Cassie.

The Library has determined that a centralized PC and Print Management solution would be the most cost effective solution given there are 10 branches. This traffic is controlled via site to site VPN to one of the County datacenters that will house the central management server. The server would need an API to the ILS to check barcodes for access to the PCs and Print services. New public images are to be created with new licensing owned by the County. This is to include Office, various Browsers, PDF readers, Video and Music players, EDR. We will use Deep Freeze to clear computers on reboot.

Other than to assist in enabling the API call to the ILS for barcodes and to assist if there is an issue with it, we envision County IT managing the public computers in the future.

Once we have this information, we will probably have more questions. What you are proposing is unique and not how we have things structured at any of our other sites, including Clifton Park-Halfmoon, Crandall or Saratoga Public libraries. We want to make sure that we are maintaining our responsibilities to the security and safety of the Polaris ILS and JA services for all of our member libraries. We appreciate you working with us on that goal. I hope that we can agree that we will not be making any changes to the networks or PCs until we have worked through all of these details.

Thank you!

Michele and Eric

From: Largeteau, Michele
Sent: Tuesday, November 14, 2023 8:14 AM
To: 'Laura D. Baker' <laura.baker@schenectadycountyny.gov>; Trahan, Eric <etrahan@mvls.info>
Cc: Thorne, Charity <cthorne@mvls.info>; Rory Fluman <Rory.Fluman@schenectadycountyny.gov>; DeMidio, Beth <bdemidio@mvls.info>
Subject: RE: Schenectady County Library IT Plan

Laura,

Thank you for sharing your proposal for the library to move their local IT support to Schenectady County IT. As you mention, it is a large undertaking and we will need some time to study each of these items to see how they will work with our requirements for the ILS and security.

The first item, changing the domain registration for the scpl.org domain is not a problem and I will have Jason work with you on that right away.

The rest of the items will require more thought and planning and we will get back to you once we have had time to evaluate.

Michele

From: Laura D. Baker <laura.baker@schenectadycountyny.gov>
Sent: Thursday, November 9, 2023 2:41 PM
To: Largeteau, Michele <mlargeteau@sals.edu>; Trahan, Eric <etrahan@mvls.info>
Cc: Thorne, Charity <cthorne@mvls.info>; Rory Fluman <Rory.Fluman@schenectadycountyny.gov>; DeMidio, Beth <bdemidio@mvls.info>
Subject: Schenectady County Library IT Plan

Caution: This email appears to have originated from outside the organization. Do not open attachments or click links from unknown or unexpected sources.

Dear Michelle & Eric,

As you are aware Schenectady County Library is moving under the purview of Schenectady County IT. The library would like to get to a point where they are relying on the JA for support of the ILS only and the rest is handled by County IT. It is a large undertaking and something we would like to move quickly on so we don't have the department in limbo between who to call for support.

This is the plan outline we discussed internally.

1. Move the scpl.org domain from it's current registrar to the County. We know the library

can initiate the transfer, but we need to know where to point the DNS to keep the website active once that is completed. **This is something we would like to do as early as next week.**

2. The county will provision user accounts for all library staff in our Office 365 tenant. Once the accounts are setup, the library would like to move their files and pertinent email from the JA tenant over to the County tenant. The County will assign @scpl.org email addresses to all users. Once they are ready they will put out of office notifications on their @mvls.info email indicating the change and notify JA to decommission the office accounts.
3. The County will then start the process of replacing network equipment at each location. Each location will be getting a firewall, new switch gear and wireless APs. With this we will need to ensure access to Polaris and Leap and any other IP filtered service.
4. We plan to create new staff PCs that will be installed after the network is in place. The machines will be connected to the County domain and users will be logging in with unique credentials and using MFA. We will be returning to JA that hard drives from existing staff computers and then rebuilding them to the County image and make them ready to deploy to another site. It would be helpful if the JA could share any special configuration needed to make the staff PCs work with Polaris and the RFID equipment.
5. We then move on to configuring new public PCs. We will need control of the Cassie installation and server at this point as well for any branch running it.

Once complete we expect to be able to direct the library staff to the County IT helpdesk for anything other than an issue with the Polaris ILS.

We would need to know if there is any equipment that is not owned by the County library that we are not aware of or if all the equipment belongs to us. We know there are licenses that we will not have access to, but are any transferrable that we already paid for. Deep Freeze for example.

JA will still have attended access through GoToAssist when someone needs support, but no longer unattended access. That will come through the County helpdesk.

We hope to work along side JA to assist in testing our imaging with Polaris. We will be employing the EDR and various firewall filtering for ssl inspection, web filtering, etc and will need to be sure it doesn't stop processes that need to be allowed through.

Thank you in advance for your assistance in this transition.

Best,
Laura Baker

Laura D. Baker

Chief Information Officer
Schenectady County
laura.baker@schenectadycountyny.gov
518-388-4705

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

From: [Hedges, Devon](#)
To: [Trahan, Eric](#)
Subject: RE: Joint Automation Council meeting January 10th 2024
Date: Wednesday, January 3, 2024 1:02:00 PM

Eric,

Based on your prior reply, I don't gather I was being trusted for anything in particular. Your response led me to believe that my inclusion was a missed oversight if anything. Also, you note your intent to be out in the open with the details of JA's response to a proposal. Is that statement not to be trusted? Nothing you noted in your reply to the group was the result or cause of any additional controversy; SCPL knows that JA has institutional resistance to certain kinds of change and JA knows that SCPL as an institution balks at that constraint. Is it messy? Sure. Is this JA's dirty laundry on display? I don't think so and would assume better of the JA as a whole than to view it as that. It's no secret that library autonomy within JA is a delicate subject.

I'm sorry to have lost your trust through sharing discussion points that you indicate your intent to share broadly and openly. From your earlier reply, it's surprising that you would assert your trust in me was involved here at all. Thank you just the same for your earlier investment and trust in me; I don't feel it was misplaced.

Devon

From: Trahan, Eric <etrahan@mvl.info>
Sent: Wednesday, January 3, 2024 12:24 PM
To: Hedges, Devon <DHedges@mvl.info>
Subject: Fw: Joint Automation Council meeting January 10th 2024

Devon,

It has come to my attention that the message below, to which Kim added your name as an outgoing JA Council member, has been widely shared among SCPL and county staff.

Thank you for so clearly identifying yourself as totally untrustworthy.

Eric

From: Trahan, Eric <etrahan@mvl.info>
Sent: Tuesday, January 2, 2024 3:09 PM
To: Zimmer, Kimberly <kZimmer@mvl.info>; Largeteau, Michele <mlargeteau@sals.edu>
Cc: Hedges, Devon <DHedges@mvl.info>; Pavoldi, Teresa <tpavoldi@mvl.info>; Wing, Erica <EWing@mvl.info>; Acklin, Valerie <vacklin@mvl.info>; O'Brien, Sharon <sobrien@mvl.info>
Subject: Re: Joint Automation Council meeting January 10th 2024

Hi Kim and others,

This requires a bit of background - bear with me.

There has always been a dichotomy in JA between the big libraries and the rest. A careful eye will see this reflected in some JA policies. The big libraries in JA are CPH, GLE, SAR and sometimes SCP. The thing that makes the SALS big 3 different from most libraries is they have their own, internal tech departments and staff. This means they handle some issues on their own without using JA resources. In some of these libraries, for example, JA has little to do with the public PCs. The big libraries handle them on their own, and don't call JA when a machine develops a problem. They deal with it themselves. Because of the size and extent of JA, it only works to manage individual machines in 8 counties if they are all the same, and JA staff can solve many issues remotely. Since these libraries have their own, on-site, IT staff, they can have more control over their individual computers. This is just one example of the difference between big and small from a JA perspective.

Now to SCP. SCP does not have the same robust IT staff that the other big libraries have. So, to keep with the same example, SCP follows all of the "small library" protocols for public computers. They do not have the limited freedom that the big SALS libraries enjoy. Of course, they also don't have to figure out and fix things on evenings and weekends. JA does that for them. It is a mixed bag.

It has been recognized for a long time that SCP would be better served if they had more IT staff. In November, they submitted a proposal that they thought would give them more staff and more freedom. Unfortunately, there are a few complications. The first is that they did not work with JA to develop the proposal, and did not say "can we be like the other big libraries"? They invented a completely new, untested scenario. So, JA can't say "sure, go ahead". To big parts of their proposal, we have to say "no". We are trying to say "how about this instead"?

The other complication is a long-standing problem that is specific to Schenectady. Part of the proposal is for Schenectady County IT to expand and provide services to the library. That is uncharted territory that has the potential to open significant holes in the carefully constructed JA security policy and procedures. The basic issue is that JA and MVLS work with libraries. Schenectady County is not a library. They don't sign off on the security policy and training; and they don't follow (or even know about!) JA policies.

We want this to be out in the open, so it is on the JA agenda, and will also be on the MVLS agenda in January. It is a developing situation, so at this point there are no details, just the general concepts. At this point it amounts to an explanation of why we are, so far, saying no.

Eric

From: Zimmer, Kimberly <KZimmer@mvls.info>
Sent: Tuesday, January 2, 2024 12:28 PM
To: Largeteau, Michele <mlargeteau@sals.edu>
Cc: Trahan, Eric <etrahan@mvls.info>; Hedges, Devon <DHedges@mvls.info>; Pavoldi, Teresa <tpavoldi@mvls.info>; Wing, Erica <EWing@mvls.info>; Acklin, Valerie <vacklin@mvls.info>
Subject: Re: Joint Automation Council meeting January 10th 2024

Michele,
Happy New Year!
I see on the JA Council Meeting agenda SCPL IT proposal.
Can you share the proposal or more information on this agenda item?

Thanks
Kim

From: Largeteau, Michele <mlargeteau@sals.edu>
Sent: Friday, December 29, 2023 12:49 PM
To: jacouncil <jacouncil@sals.edu>; all-directors <all-directors@sals.edu>; Ferriss, Jennifer <jferriss@sals.edu>; Ryder, Jill <jryder@sals.edu>; O'Brien, Sharon <sobrien@mvls.info>; Scott, Jack <JScott@sals.edu>; Oakley, Trevor <toakley@sals.edu>
Cc: Thomson, Jason <jason@sals.edu>; Jensen, Jesse <jjensen@sals.edu>
Subject: Joint Automation Council meeting January 10th 2024

The Joint Automation Council meeting will be Wednesday January 10th at 9:30 at **MVLS**.

The agenda and previous meeting minutes are attached.

Council members are asked to please let me know whether or not they will be able to attend in person.

Thank you!
Michele

~~~~~

Michele Largeteau  
[mlargeteau@sals.edu](mailto:mlargeteau@sals.edu)  
Joint Automation Project Manager  
Southern Adirondack Library System  
22 Whitney Place  
Saratoga Springs, New York 12866  
(518) 584-7300      FAX (518) 587-5589  
~~~~~

Hi Kim and others

From: [Trahan, Eric](#)
To: [Thorne, Charity](#)
Subject: SAPL, MVLS & JA
Date: Thursday, January 4, 2024 10:35:35 AM

Hi Charity,

I have learned – and I expect that you have already heard that I have learned – that my reply to Kim Zimmer’s question, copied below, is fueling an unfortunate and false “MVLS is against us” narrative in Schenectady. This troubles and puzzles me, since there is nothing in my reply that hasn’t already been said, more than once, before now.

But that is the past, and I want to address the future. It was inevitable that the other libraries would begin hearing about SCPL’s plans and that they will ask questions and have opinions. I am concerned that unless there is much more open communication, it is highly likely that there will be a similarly unfortunate “SCPL is against us” narrative developing among the other MVLS and SALS libraries.

MVLS, and by extension JA, may appear to be administrative entities, but they are really communities of colleagues and collaborating libraries. Do you have any thoughts on managing SCPL’s reputation among the other libraries? In order for positive change to happen, you will need allies among the other libraries. MVLS and JA are not going to go against the will of the majority. What is your strategy for bringing a majority to embrace your plans?

This is very similar to the fine block threshold issue. Schenectady lost that fight, and lost the respect of the other libraries, because there was too little attention paid to the views – right or wrong – of the other libraries. They were not listened to and respected, not courted as allies, and so they easily became – and remain - opponents.

There is no reason why any of this should be a fight. There is nothing gained by having libraries pitted against one another. The only way forward is through consensus. I am asking you to help build and to be a part of a consensus. I am convinced that a positive consensus is possible if we find a way to hear and educate all of the libraries.

Eric

Sent: Tuesday, January 2, 2024 3:09 PM

To: Zimmer, Kimberly <KZimmer@mvls.info>; Largeteau, Michele <mlargeteau@sals.edu>

Cc: Hedges, Devon <DHedges@mvls.info>; Pavoldi, Teresa <tpavoldi@mvls.info>; Wing, Erica <EWing@mvls.info>; Acklin, Valerie <vacklin@mvls.info>; O'Brien, Sharon <sobrien@mvls.info>

Subject: Re: Joint Automation Council meeting January 10th 2024

Hi Kim and others,

This requires a bit of background - bear with me.

There has always been a dichotomy in JA between the big libraries and the rest. A careful eye will see this reflected in some JA policies. The big libraries in JA are CPH, GLE, SAR and sometimes SCP. The thing that makes the SALS big 3 different from most libraries is they have their own, internal tech departments and staff. This means they handle some issues on their own without using JA resources. In some of these libraries, for example, JA has little to do with the public PCs. The big libraries handle them on their own, and don't call JA when a machine develops a problem. They deal with it themselves. Because of the size and extent of JA, it only works to manage individual machines in 8 counties if they are all the same, and JA staff can solve many issues remotely. Since these libraries have their own, on-site, IT staff, they can have more control over their individual computers. This is just one example of the difference between big and small from a JA perspective.

Now to SCP. SCP does not have the same robust IT staff that the other big libraries have. So, to keep with the same example, SCP follows all of the "small library" protocols for public computers. They do not have the limited freedom that the big SALS libraries enjoy. Of course, they also don't have to figure out and fix things on evenings and weekends. JA does that for them. It is a mixed bag.

It has been recognized for a long time that SCP would be better served if they had more IT staff. In November, they

submitted a proposal that they thought would give them more staff and more freedom. Unfortunately, there are a few complications. The first is that they did not work with JA to develop the proposal, and did not say "can we be like the other big libraries"? They invented a completely new, untested scenario. So, JA can't say "sure, go ahead". To big parts of their proposal, we have to say "no". We are trying to say "how about this instead"?

The other complication is a long-standing problem that is specific to Schenectady. Part of the proposal is for Schenectady County IT to expand and provide services to the library. That is uncharted territory that has the potential to open significant holes in the carefully constructed JA security policy and procedures. The basic issue is that JA and MVLS work with libraries. Schenectady County is not a library. They don't sign off on the security policy and training; and they don't follow (or even know about!) JA policies.

We want this to be out in the open, so it is on the JA agenda, and will also be on the MVLS agenda in January. It is a developing situation, so at this point there are no details, just the general concepts. At this point it amounts to an explanation of why we are, so far, saying no.

Eric

From: Zimmer, Kimberly <KZimmer@mvls.info>
Sent: Tuesday, January 2, 2024 12:28 PM
To: Largeteau, Michele <mlargeteau@sals.edu>
Cc: Trahan, Eric <etrahan@mvls.info>; Hedges, Devon <DHedges@mvls.info>; Pavoldi, Teresa <tpavoldi@mvls.info>; Wing, Erica <EWing@mvls.info>; Acklin, Valerie <vacklin@mvls.info>
Subject: Re: Joint Automation Council meeting January 10th 2024

Michele,
Happy New Year!
I see on the JA Council Meeting agenda SCPL IT proposal.
Can you share the proposal or more information on this agenda item?
Thanks
Kim



Trahan, Eric

SCPL Board Packet 09.19.2024
Page 70

2:03 PM

To kchawk@midtel.net, +15



The meeting this morning between MVLS, JA, SCPL and Schenectady County representatives was productive in identifying paths forward for finding a new way for SCPL to work with JA. There is still a lot of work to do in navigating the details of that new way; but we seem to have acceptance that the way forward will be a scenario that does not differ in essentials from the existing JA relationships with the large JA libraries.

It was encouraging to see County IT staff amenable to substantially changing their proposal to meet JA security concerns. It is also very heartening to see JA staff diligently advocating for the security of the JA network and library data.

From: [Madelyn Thorne](#)
To: [Thorne, Charity](#)
Subject: Fwd: MVLS Update
Date: Tuesday, January 30, 2024 4:14:40 PM

Caution: This email appears to have originated from outside the organization. Do not open attachments or click links from unknown or unexpected sources.

As requested, see below.
Mt

Madelyn Thorne

----- Forwarded message -----

From: **Trahan, Eric** <etrahan@mvls.info>
Date: Fri, Jan 26, 2024 at 3:05 PM
Subject: MVLS Update
To: mthorne53@gmail.com <mthorne53@gmail.com>

Hi Madelyn,

I was nice to see you at the meeting yesterday, and to share memories about Esther and the golf tournaments. If you have any interest, we do still do golf tournaments to raise money for library grants.

I understand that, if all went according to plan, you are now the SCPL Board President. Congratulations! MVLS is here to help if you ever have any questions. You probably have a copy of the Trustees Handbook. There is a new version - so new that it is not yet included on the state education department website. But there is pdf version online here: <https://nysl.ptfs.com/aw-server/rest/product/purl/NYSL/s/ecaec4e1-1c91-4ad6-85b6-5d23cfd2c61d>. I can get you a paper copy if you would like one.

There are two issues that came up yesterday that I want to provide a little more information on. One is the status of library employees as county employees. Library employees are employees of the library, a separate, educational corporation (with its own EIN) chartered by the NYS Board of Regents. Yes, those employees are paid through the county, get their benefits through the county, have their union agreements through the county etc. Those are all due to voluntary, informal (my opinion: they should be formalized), cooperative agreements between the library and the county. Those longstanding informal agreements do not in any way negate the legal separateness of the library. Rory made a statement yesterday that exactly encompasses the facts concerning his authority over the library: he holds the \$7 million purse strings (must be capital as well as operating). And yes, that is huge, maybe even

more important than legal authority. But it is not legal authority.

That is related to two longstanding issues with the SCPL Board. In the handbook chapters on Personnel (p 65) and Budget and Finance (p75) it clearly states that library boards are required to approve all personnel actions and all expenditures for library purposes. Those things don't happen at SCPL board meetings. Yes, it is valid to say that the way things have been done has mostly worked OK. Anyone can get lucky. But they can also get unlucky. In an environment where there seems to be more discontent about libraries, I submit that it could get somewhat uncomfortable for the SCPL board if it comes out that the board isn't doing what it is supposed to do. MVLS is happy to help in any way we can in devising processes that bring these issues before the board.

Finally, and more directly related to the purpose of yesterday's meeting, it is, frankly, a bit silly for SCPL to hold its ability to leave the JA consortium as some kind of bargaining chip. The truth is exactly the opposite. If SCPL left the consortium, the consortium would go along just fine, as would the other 49 libraries and their users. The only people who would really be hurt would be the library users in Schenectady. Numbers tell the story. There are 2.3 million physical items in the consortium database available for library patrons. 300,000 belong to SCPL. If SCPL withdraws, SCPL's users access to library resources goes from 2.3 million down to 300,000. For the other 49 libraries, it goes from 2.3 million to 2 million. And the problem for Schenectady users is even bigger than those numbers, because SCPL is a significant net borrower of resources. In 2023 you borrowed 44,000 items from other libraries and loaned 31,500. Leaving the consortium means SCPL has to spend more money, and provides reduced services.

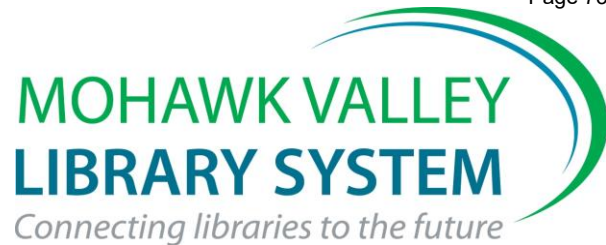
I would be happy to meet with you, a committee or the full board to discuss any of these issues. Thanks for listening. Have a great weekend,

Eric

If you believe you have received this message in error or do not wish to receive this information via email, please reply to this message.

To report this message as spam or offensive, please send e-mail to abuse@sals.edu including the entire contents and subject of the message.

It will be reviewed by staff and acted upon appropriately.



TO: SCPL Board

FROM: MVLS Board

RE: SCPL Executive Director's Letter of August 29, 2024

September 9, 2024

To the Board:

The MVLS board has received and paid deep attention to the SCPL Executive Director's letter of August 29, 2024.

We note that the letter states that the opinions expressed are "personal" and do not reflect the opinion of the SCPL Board of Trustees; it then makes many serious accusations, which MVLS will address carefully.

However, we also note that the letter ends with an unequivocal request from the Executive Director of the Schenectady County Public Library for the Mohawk Valley Library System to develop a proposal for Library and the System to "part ways."

The Board of MVLS firmly believes that the time and resources needed to develop such a "Removal Proposal" could, even at this stage of matters, be put to better use exploring a more positive resolution of the current situation. We also believe such exploration would be consistent with our obligations to our served communities.

So, prior to the MVLS Board responding to the entirety of the Executive Director's letter, the MVLS Board asks the SCPL Board: is this request by SCPL Executive Director to prepare a Removal Proposal consistent with your instructions as a governing board?

If this request is consistent with a directive by the Schenectady County Public Library Board of Trustees, the Mohawk Valley Board of Trustees will instruct the System leadership to connect with the Division of Library Development to explore the viability of such a plan.

If, however, the request is NOT consistent with an instruction from the SCPL Board, MVLS will develop a proposal for a process of collaborative problem-solving through mediation, using a mutually selected neutral mediator (selected by both SCPL and MVLS), and offer that to the SCPL Board by the end of September.



This request for clarity and offer of neutral mediation is to ensure our boards are communicating directly, and that both have been provided with the time and information needed to fully assess this matter in a way that serves our communities.

Please direct your reply to the MVLS Board via MVLS, 858 Duanesburg Rd., Schenectady, NY, 12306 or via email to Eric Trahan at etrahan@mvls.info.

If further discussion is warranted prior to a written reply, please request a board-to-board meeting from MVLS Board President Mary VanPatten at mvanpatten@gmail.com.

Thank you. We look forward to our boards working together in a spirit of service.

Sincerely,

A handwritten signature in black ink that reads "Mary B. Van Patten".

Mary VanPatten, President
MVLS Board

cc: Lauren Moore, Division of Library Development
Sara Dallas, Southern Adirondack Library System



September 13, 2024

Mohawk Valley Library System Board of Trustees
858 Duaneburg Road
Schenectady, NY 12306

To the Mohawk Valley Library System Board of Trustees,

Thank you for your letter on August 29, 2024. We appreciate your attention to the concerns we share, and we would like to express that both our Board and Executive Director are aligned in offering MVLS the opportunity to address these issues. We are hopeful that through good faith efforts, MVLS can demonstrate that continued membership is in the best interest of our library, even as we focus on transitioning from Joint Automation.

We are looking forward to fostering a strong and collaborative partnership with the Mohawk Valley Library System (MVLS). As the Schenectady County Public Library (SCPL) Board of Trustees, we are eager to work together to enhance our mutual goals and serve our communities effectively. To ensure that our partnership remains productive and equitable, we would like to formally address several matters of importance regarding our relationship with MVLS. Given that SCPL serves approximately 55% of the total population within the MVLS system, we believe it is essential to discuss aspects related to fair representation, open communication, and a clear understanding of system services.

We would like to outline several key matters concerning our relationship with MVLS. The following points detail our primary concerns and areas for discussion:

1. Proportionate Representation on the MVLS Board: Given that Schenectady County comprises more than half of the population served by MVLS, the SCPL Board of Trustees requests that Schenectady County have proportionate representation on the MVLS Board. We believe this is essential for ensuring that the needs and interests of our population are adequately reflected in system decisions.
2. Nomination of MVLS Board Representatives: Additionally, the SCPL Board of Trustees respectfully requests the ability to have designation of representatives from Schenectady County to serve on the MVLS Board be by SCPL board action. Given our county's large share of the system's population, it is only appropriate that we have a direct role in choosing individuals who will advocate for the interests of our patrons and community.
3. Clarification of System Services: Finally, we would appreciate written clarification on the specific system services to which we are entitled as a member of MVLS, especially in light of our decision to withdraw from the Joint Automation (JA) Project. While we remain a member of MVLS, it is important to have a clear and documented understanding of what services SCPL can expect moving forward. This will allow us to plan effectively and ensure that our patrons continue to receive the highest level of service.



99 Clinton Street • Schenectady, New York 12305
518.388.4500 • www.scpl.org

We appreciate your attention to these matters and look forward to working collaboratively with MVLS to support the shared goal of providing exceptional library service to our communities.

Sincerely,

Madelyn Thorne
President of the Board of Trustees
Schenectady County Public Library

CC Lauren Moore, Assistant Commissioner for Libraries, New York State Education
Department

Vicky Wagenbaugh



Schenectady County Public Library
99 Clinton Street
Schenectady, NY 12305

June 26, 2024

To Whom It May Concern:

I visited the main branch library with my children yesterday and noticed that the library has displays for Pride Month in both the main section and the children's section. I wanted to write to let you know how much this delighted me and how grateful I am to the librarians for putting together such thoughtful displays. At a time when libraries and are increasingly coming under scrutiny and the debates over banned books are raging, it made me very happy to know that my community is giving its patrons – including children – a chance to see themselves represented and celebrated.

Thank you this and every month for all that you do to make the library a welcoming place for all!

Yours Sincerely,

A handwritten signature in black ink, appearing to read 'VW'.

Vicky Wagenbaugh

New response has been submitted to Microsoft Form at 8/1/2024 5:38:00 PM

Bixler, Doug <DBixler@mvls.info>

Thu 8/1/2024 1:38 PM

To: Martin, Janice <jmartin@mvls.info>; Thorne, Charity <cthorne@mvls.info>; DeMidio, Beth <bdemidio@mvls.info>; Hedges, Devon <DHedges@mvls.info>

A new response has been submitted to Microsoft Form:

Question/Comment:

Comment

Which SCPL location does this pertain to?

Rotterdam Branch Library

What is your Question/Comment?

I just wanted to say my granddaughter and I have been really enjoying the stories and breakfast program with Miss Steph. She is so patient with the kids but also has a way about her that controls the chaos and makes everything fun. We have also been going to the library more! It's been a fun Summer.

What is your Name:

Natalie

Best way to contact you?

Email

Please enter your email/phone number:

[REDACTED]

New response has been submitted to Microsoft Form at 8/22/2024 4:21:45 PM

Bixler, Doug <DBixler@mvls.info>

Thu 8/22/2024 12:21 PM

To: Martin, Janice <jmartin@mvls.info>; Thorne, Charity <cthorne@mvls.info>; DeMidio, Beth <bdemidio@mvls.info>; Hedges, Devon <DHedges@mvls.info>

A new response has been submitted to Microsoft Form:

Question/Comment:

Comment

Which SCPL location does this pertain to?

Hon. Karen B. Johnson Central Library

What is your Question/Comment?

I Would like to thank all the good things that happened to also met one of the worker she when out of her way to help me with jobs and the computer as well i also got a job with her help i just wanna say a big thank you to my friend Jenn Malave for the help ever

What is your Name:

scott robinson

Best way to contact you?

Email

Please enter your email/phone number:

[REDACTED]

New response has been submitted to Microsoft Form at 9/3/2024 11:21:12 AM

Bixler, Doug <DBixler@mvls.info>

Tue 9/3/2024 7:21 AM

To: Martin, Janice <jmartin@mvls.info>; Thorne, Charity <cthorne@mvls.info>; DeMidio, Beth <bdemidio@mvls.info>; Hedges, Devon <DHedges@mvls.info>

A new response has been submitted to Microsoft Form:

Question/Comment:

Comment

Which SCPL location does this pertain to?

Overall Schenectady County Public Library System

What is your Question/Comment?

I would like to say how very helpful and knowledgeable Jenn Malave and her co-worker were

What is your Name:

Carol Eto

Best way to contact you?

Email

Please enter your email/phone number:

████████████████████