FY2017 Staff Activities Report – February 2017 Activities

Demonstrating our commitment to the IHLS Plan of Service

This monthly report documents how staff activities are tied to the IHLS Plan of Service. At the beginning of each section is a narrative for each service, followed by the priorities and goals of each department. The number(s) in parenthesis behind an activity reflects which goal(s) it is tied to. Additional activities are those which go above and beyond reaching our Plan of Service goals and demonstrate the hard work and dedication of the IHLS staff.

Administrative Service:

Implementation of three-year plan to improve member services. Assessment and modification of communication paths with all IHLS stakeholders. Continued training and implementation of additional modules in the Abila software.

Administrative Service Priorities

COMMUNICATIONS

Goal:

1. **Goal: Effective and efficient communication with IHLS stakeholders**

Activities tied to goals:

- Held a Connect with Leslie meeting using Zoom.
- Meetings were held on the rebranding project.
- Attended workshops to improve IHLS's communication to members.
- Reviewed news feeds for information of interest to IHLS members such as grants, upcoming continuing education opportunities, and member news to be included in the IHLS newsletter and shared on Facebook.
- Seven (7) grant opportunities were added to the Grants page on the IHLS website and shared through the IHLS newsletter.
- Two (2) discounts were added to the Vendor Discount page on the IHLS website and shared through the IHLS newsletter.
- The IHLS newsletter, Moving Forward Together, sent on a regular basis to over 2,100 subscribers.
- Created and sent the monthly newsletter, IHLS Staff Connection, to staff.

HUMAN RESOURCES/FINANCE

Goals:

1. **Support and development of IHLS staff**
2. **On time delivery of financial reports**
3. **Continued implementation of Abila financial management software**
4. **Effective and efficient communication with IHLS staff**
5. **Assist Operations department**
6. **Support resource sharing**

Activities tied to goals:

- **Live Workshop/Online Training + number of attendees (1)**

1. Photography for Non-Profits (Live seminar) – 4 staff members (free)
2. Storytelling for non-profits (Live seminar) – 5 staff members (free)
3. Making Facebook work for your non-profit (Live seminar) – 4 staff members (free)
4. Safety Training – All staff (free)
5. FMLA Compliance (Live seminar) – 3 staff members
6. Business Writing for Results (Live seminar) – 1 staff member
7. Collections Law (Live seminar) – 2 staff members
8. Helping Employees Use Their Time Wisely (Webinar) – 1 staff member
9. Facilities Management (Live seminar) – 2 staff members
10. The Essentials of HR Law (Live seminar) - 1 staff member
11. Efficient Web Design Workflow (Lynda.com) - 1 staff member
12. Implementing an Information Security Program (Lynda.com) - 1 staff member
13. Moodle 3.0 Essential Training (Lynda.com) - 5 staff members
14. Up and Running with SCORM and TIn Can API (Lynda.com) - 1 staff member
15. Screencasting Fundamentals (Lynda.com) - 3 staff members
16. Publisher 2016 Essential Training (Lynda.com) - 1 staff member

- Conducted 3 new hire orientations (1)
- Recruited and hired part-time two sorters and one courier for CHA Location. (5)
- Prepared January 2017 Bill Payment, Credit Card Transaction, Statement of Revenues and Expenditures, and Balance Sheet Reports for IHLS Finance Committee and Board of Directors.(2)
- Developed and presented General Fund cash position and projections as of January 31, 2017.(2)

Additional activities:

- Prepared and processed two payrolls.
- Generated and mailed 170 accounts receivable invoices.
- Received and posted 137 accounts receivable cash receipts checks.
- Received and entered 156 accounts payable invoices.
- Disbursed 122 accounts payable checks totaling $169,331.51.

IT

Goal:

1. **To provide the IT support necessary for IHLS to function efficiently**

Activities tied to goal:

- In response to heightened threats around ransomware, IT staff have put in more security to prevent accidental infection. This does not guarantee we won't become infected, but it reduces the risk.

- IPad delivery project continues to go well and minor bugs and efficiencies are being identified and fixed.
- Helping setup Polaris for the Decatur Public Library's automation project to sort books using RFID (Radio Frequency ID) tags.
- Polaris Printing upgrades to prepare for Polaris upgrade in April. This causes slow printing for some libraries, and we have the instructions on how to fix it available now.
- Charter internet access to EDW is complete.
- Equipment purchased to replace video conference equipment at Champaign. This will cancel the ongoing lease we have with CMS (Central Management Services) for $475/mo. Total cost of new equipment will be about $2700. Return on investment is 6 months.

BOARD SUPPORT

Goals:

1. **Refine process for future board and committee meetings**
2. **100% state and federal compliance for IHLS/Board and appropriate IHLS staff**

Activities tied to goals:

- Provided board with a committee meeting calendar
- Created orientation binder for new board member
- Priorities team continues working on rebranding timeline in support of advocacy

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RECORD RETENTION

Goal:

1. **Retain and purge materials on an approved schedule**

Activities tied to goal:

- Continue to identify surplus items and work on a plan for disposal
- Research value of surplus equipment

GRANT DOCUMENT TRACKING

Goal:

1. **Maintain and track all grant documentation and due dates**

Activities tied to goal:

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Additional activities:

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NETWORKING

Goal:

1. **To make IHLS an active partner in statewide and national initiatives that support enhanced library service**

Activities tied to goal:

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Additional activities:

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LONG RANGE PLANNING

Goal:

1. **Three-year plan**

Activities tied to goal:

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Additional activities:

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Bibliographic Access:

As a cornerstone of resource sharing, Bibliographic Access services in FY2017 will promote:

- *The availability of bibliographic support in a variety of methods including cataloging and database maintenance for the SHARE Consortium, cataloging training for SHARE members and statewide support through the Cataloging Maintenance Center.*
- *Access to digitized information found in Illinois libraries and at IDA (Illinois Digital Archives) by providing information on formation and content of Metadata.*

Bibliographic Service Priorities

CATALOGING SERVICE FOR SHARE

Goals:

1. **To provide cataloging service for SHARE member libraries**
2. **To increase usability of the SHARE database by cleaning up duplicate records and incorrect cataloging and maintaining authority files in the SHARE database**

Activities tied to goals:

- Staff cataloged 677 items for SHARE member libraries. (1)
- Staff imported 202 $3 bibs (bibliographic records) for SHARE member libraries. (1)
- Staff created 121 on order bibs for SHARE member libraries (1)
- Staff cataloged 515 items for new member libraries joining SHARE (1)
- Staff merged 585 bibliographic records, clean up/corrected 2,931 bibliographic records, and corrected/cleanup 17 item records. (2)

CATALOG TRAINING

Goal:

1. **Goal: To increase the understanding and skills in bibliographic services and cataloging for members libraries and to stay current with national, state and local policies such as RDA, AACR2, OCLC and Library of Congress**

Activities tied to goal:

- SHARE bibliographic services staff taught 11 cataloging related classes and hosted one Cataloger's Training Session. (1)

CATALOGING MAINTENANCE CENTER

Goals:

1. **To provide cataloging and bibliographic services for the libraries in RAILS and IHLS in order to increase access and encourage resource sharing of information resources found in Illinois libraries**
2. **To support access to digitalized information found in Illinois libraries and at IDA by providing information on formation and content of metadata**

Activities tied to goals:

- Staff continue to work with Illinois Digital Archives to finish loading metadata into the Illinois Digital Archives database, and editing transcriptions for scrapbooks for the Lombard College. (2)
- Prepared for the Resource Description and Access (RDA) classes in March. (1)
- CMC staff cataloged 144 items for libraries in Illinois. (1)
- CMC staff created 36 NACO name authority records for improved user access. (1)

TMQ (THE MARC OF QUALITY)

Goals:

1. **Improve the quality of the SHARE database, thus improving user access to information resources**
2. **OCLC WorldCat holdings for member libraries are updated in a timely manner, which should increase resource sharing**

Activities tied to goals:

- Holdings were added to OCLC for SHARE members. (2)
- Staff worked on reports provided by The MARC of Quality. (1)

Resource Sharing:

- *Highlight the focus on full participation in resource sharing as required by the revised system standards.*
- *Make a system-wide effort to use multiple channels of communications and formats of continuing education to ensure libraries are familiar with the revised ILLINET Interlibrary Loan Code.*
- *Continue the development of our LLSAP through the promotion the advantages of membership in SHARE. Of particular focus will be a concerted effort to raise awareness and participation from any ILLINET member, regardless of library system affiliation. Additionally, the work to bring transitional members to the point of going live on SHARE will involve a significant amount of staff time and attention.*
- *Continue to enhance and improve services for existing LLSAP members through attention to current practices and policies and being alert to opportunities for improvement that might present themselves during the fiscal year.*
- *Research and review E-Resources that would be beneficial to our stakeholders. E-Resources that are adopted for system use will be promoted throughout the system with the expectation of increased participation.*

Resource Sharing Priorities

LLSAP (SHARE)

Goal:

1. **Provide an innovative resource discovery, sharing and delivery system.**

Activities tied to goal:

- Annual Memorandum of Understanding forms for FY2018 were sent to each SHARE member library. The purpose of these agreements is to verify continued participation in SHARE, to identify plans for use of Polaris modules, as well as cataloging status, in preparation for determining SHARE fees for the next fiscal year. To date, no libraries have indicated the intention of dropping membership.

LLSAP DEVELOPMENT

Goal:

1. **Increase members participating in SHARE**

Activities tied to goal:

- Ellen Popit and Chris Dawdy met with the directors and board members of Tilden Public Library, Witt Township Library, and Ramsey Public Library to discuss the possibility of their libraries joining SHARE with assistance from the Wal-Mart State grant.

Additional activities:

- Carlinville Intermediate School, Ramsey High School, and Ramsey Elementary School are now live on Polaris.

ILLINET INTERLIBRARY LOAN CODE

Goal:

1. **Increase familiarity and compliance with the ILLNET Interlibrary Loan Code**

Activities tied to goal:

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Additional activities:

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E-RESOURCES

Goal:

1. **Increase familiarity with and utilization of eResources**

Activities tied to goal:

- Royalton Public Library started participation in the Cloud Library shared collection on February 1, 2017. As of March 1, the total number of library agencies participating is 200 (244 buildings). (1)
- Decatur Public Schools joined the Zinio for School Libraries group on February 1, bringing the total number of school agencies participating to 14. (1)
- In person training on the Cloud Library was provided to Christopher Public Library and a visit regarding the Cloud Library was made to Sesser Public Library on February 15, 2017. (1)
- A Zinio Users Group was held at Forsyth Public Library on February 2, 2017. The rep provided useful information about the new Zinio app and members were able to ask questions and provide feedback. We hope to make this an annual event. (1)

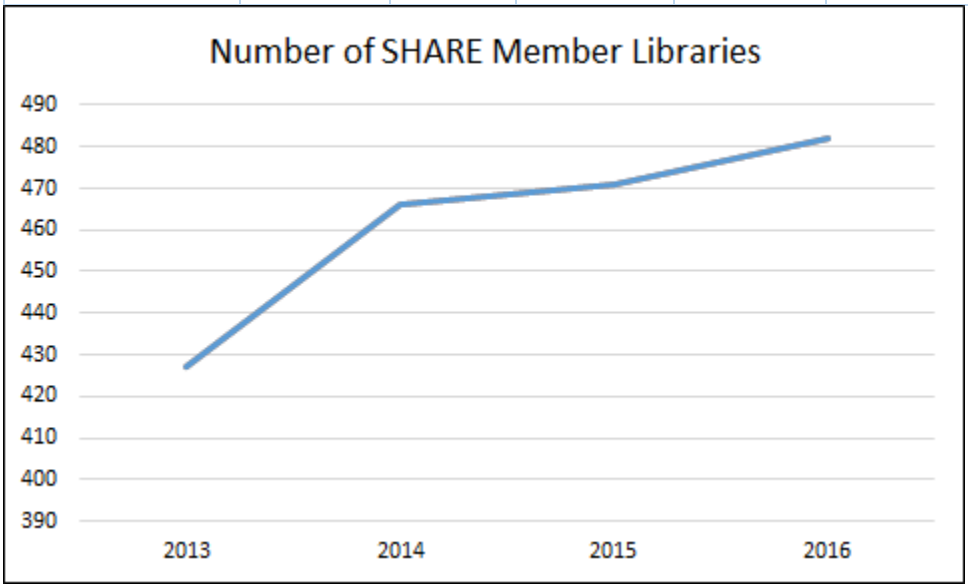
Additional activities:

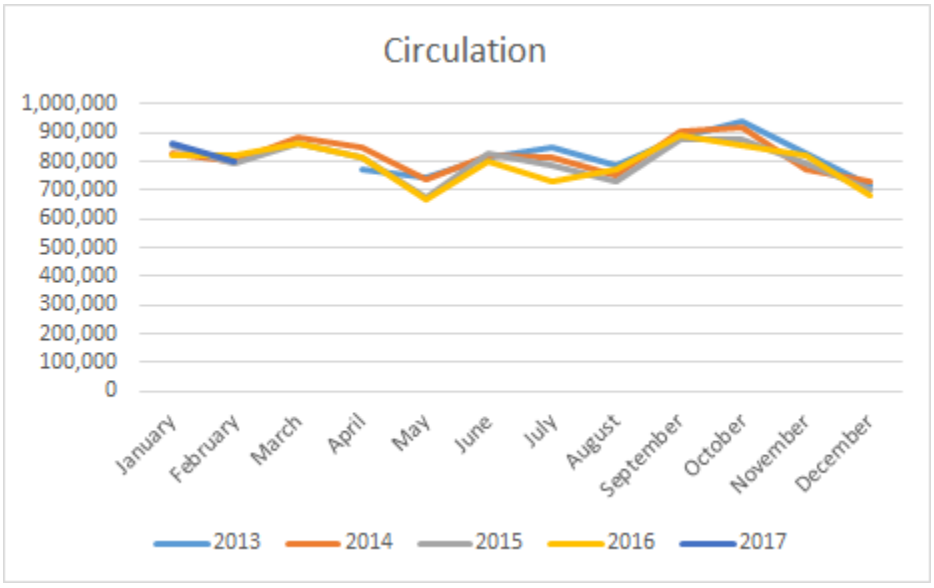
- EResource demonstrations from Demco Software were scheduled for March and a vendor discount was added to the IHLS Member Discounts webpage.

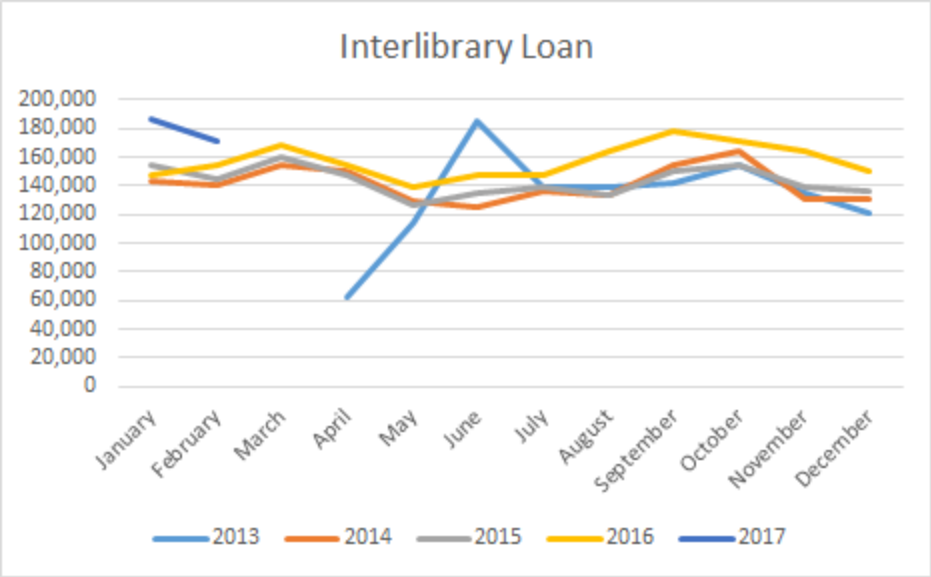
SHARE Statistics

	Circulation	ILL	Reciprocal Borrowing	PAC Searches	Holdings	Bibs	Patrons
July - 16	*732,014*	*147,853*	*67,944*	*1,022,861*	*9,240,186*	*1,843,617*	*817,164*
Aug - 16	*770,064*	*164,585*	*60,333*	*999,263*	*9,270,779*	*1,828,926*	*820,638*
Sept - 16	*893,619*	*893,619*	*61,127*	*919,900*	*9,294,272*	*1,842,936*	*812,870*
Oct - 16	*856,619*	*856,619*	*56,668*	*881,243*	*9,309,983*	*1,845,810*	*814,219*
Nov - 16	*819,181*	*819,181*	*52,150*	*801,306*	*9,321,947*	*1,848,249*	*814,357*

Dec - 16	*681,303*	*681,303*	*46,402*	*815,326*	*9,323,317*	*1,847,422*	*814,693*
Jan - 17	*862,751*	*186,851*	*52,758*	*897,795*	*9,330,945*	*1,849,837*	*816,146*
Feb - 17	801,069	171,320	51,303	809,065	9,338,607	1,842,104	815,965
Mar - 17							
Apr - 17							
May - 17							
June – 17							






Interlibrary Loan
200,000
180,000
160,000
140,000
120,000
100,000
80,000
60,000
40,000
20,000
0
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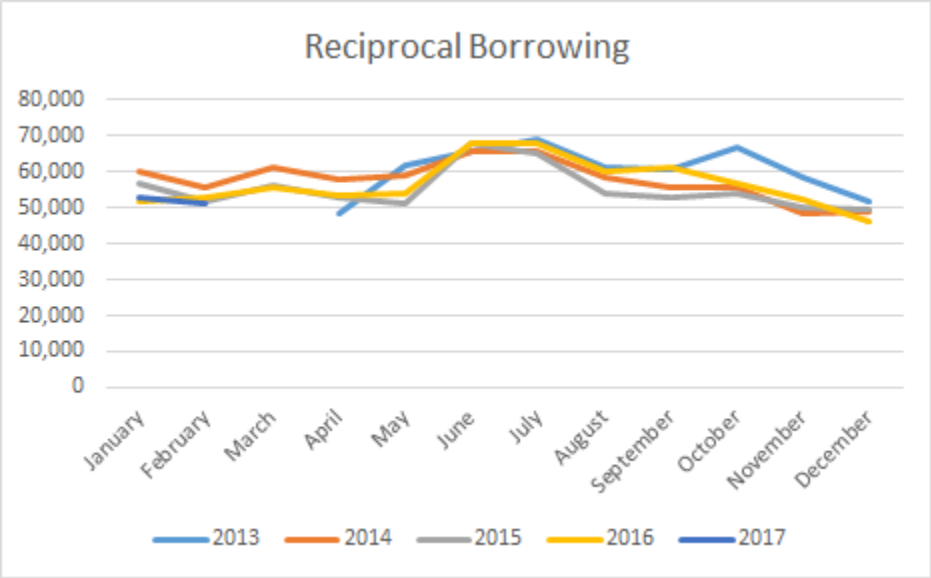
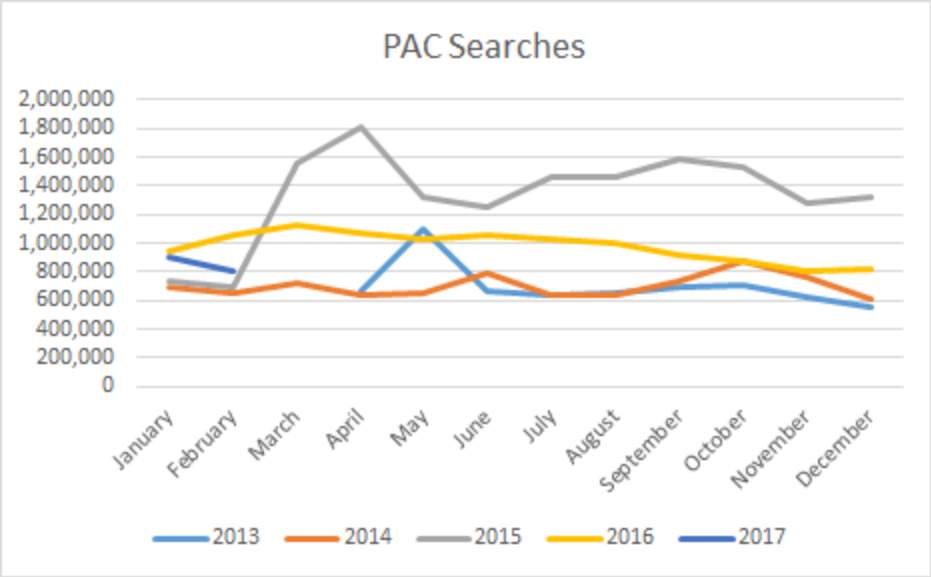
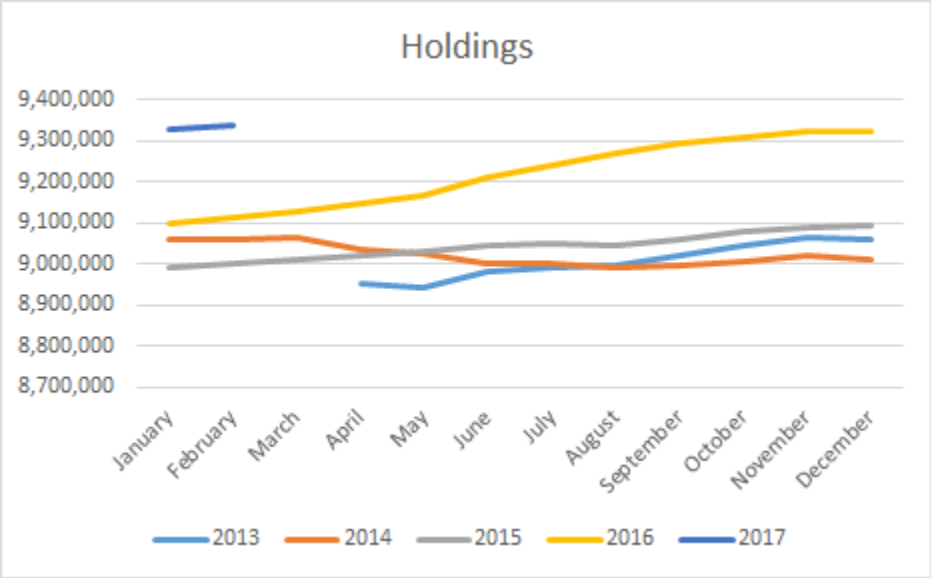
2014
2015
2016
2017


Reciprocal Borrowing
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
January
February
March
April
May
June
July
August
September
October
November
December
2013
2014
2015
2016
2017


PAC Searches
2,000,000
1,800,000
1,600,000
1,400,000
1,200,000
1,000,000
800,000
600,000
400,000
200,000
0
January
February
March
April
May
June
July
August
September
October
November
December
2013
2014
2015
2016
2017


Holdings
9,400,000
9,300,000
9,200,000
9,100,000
9,000,000
8,900,000
8,800,000
8,700,000
January
February
March
April
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June
July
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December
2013
2014
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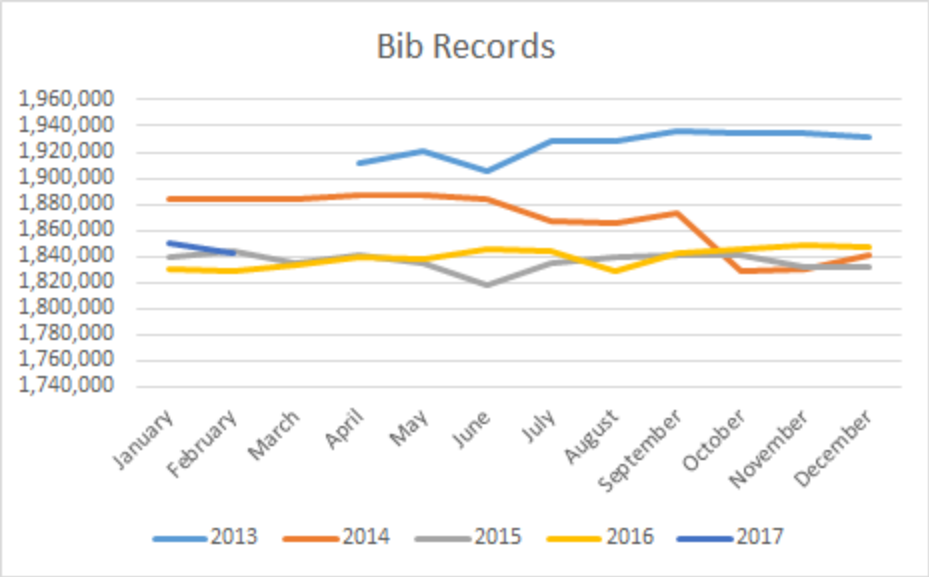
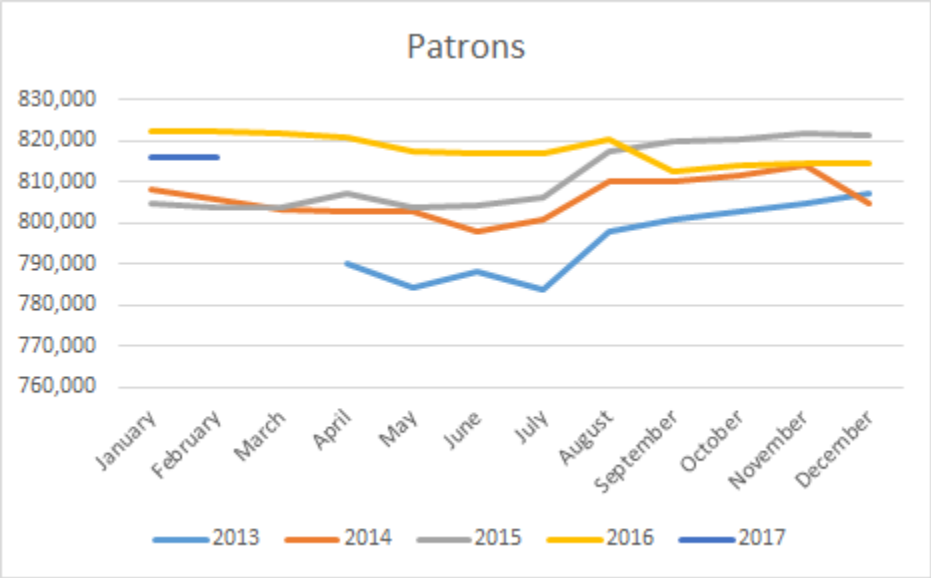
2016
2017





Consulting and CE:

The value of consulting and continuing education opportunities have been voiced loud and clear by our members for the past five years. As these services begin to grow back, efforts will be designed to:

- *Hit the target of site visits to 20% of our member libraries (102 agencies). Agencies would include public libraries with new directors, struggling school districts and responses to specific invitations from library agencies who would like assistance with understanding and complying with State Statutes and Administrative Rules as well as system bylaws, policies and services.*
- *Support training on the revisions of the ILLINET Interlibrary Loan Code.*
- *Continue the development on an annual IHLS Member Day.*

- *Craft no-cost or cost-recovery continuing education opportunities for our members that comply with ISL directives.*
- *Encourage member awareness of and participation in regional, statewide and national professional development opportunities as they present themselves.*

Consulting and CE Priorities

CONSULTING SERVICES

Goal:

1. **To be responsive to the expressed needs of member libraries for consulting services**

Activities tied to goal:

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Additional activities:

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CONTINUING EDUCATION

Goal:

1. **To provide continuing education opportunities as allowed by ISL directive**

Activities tied to goal:

- SHARE staff conducted 17 training sessions covering cataloging, circulation, and eResources in February.

DELIVERY:

The focus of delivery services offered by the Illinois Heartland Library System in FY17 these services will include:

- *Compliance with the recommendations of the Illinois Statewide Delivery Committee.*
- *The availability of 5 day a week delivery using zoned routes and SHARE software.*
- *A revised web presence.*
- *A help desk designed to provide responsive customer service.*
- *Efficient tracking of delivery statistics through the in-house creation of an app that will allow data to be input throughout the day and uploaded on a regular basis.*
- *Please see the Delivery Revenue table at the end of this document.*

Delivery Priorities

DELIVERY SERVICE

Goal:

1. **Efficient provision of delivery services designed to support resource sharing among IHLS members**
2. **Provision of accurate information and educational tools to support delivery**

3. **Accurate member library data in L2**

Activities tied to goals:

- Champaign hub has started providing more service to their members who were getting less than 5 day a week service. Edwardsville and Carbondale hubs have been doing this as well.

Additional activities:

- IPads which track mileage, statistical data (items delivered and picked up as well as number of stops) and provide a checks and balances for the routes, are now functioning in all of the hubs. This has reduced the number of staff hours in each hub that was necessary to input this data into an electronic form.
- The annual delivery survey has been completed. In the process of analyzing the data that has been submitted.

Delivery Statistics

February 2017	IHLS LIBRARIES Delivery	IHLS HUB to HUB Delivery	ILDS - CARLI Delivery
Carbondale	60,181	26,080	2,723
Champaign	227,123	56,523	7,010
Edwardsville	211,778	57,080	3,747