Illinois Heartland Library System

2014 System Programs

This System Program provides a summary explanation of the IHLS goals and objectives and provides a description of the planned activities for each programmatic area that is listed in the proposed IHLS budget. It supports the Illinois State Library's priorities and represents the annual element of the IHLS Strategic Plan.

Priority: Resource Sharing

Goal I: Provide an innovative resource discovery, sharing and delivery system:

Objective A: Encourage resource sharing

Activities:

1. Monitor SHARE policy and protocol compliance and coordinate those policies with IHLS policies regarding resource sharing.
2. Assist member libraries in promoting their participation in reciprocal borrowing within IHLS and statewide.
3. Maintain non-resident borrower card purchase locations on IHLS Website.
4. Promote the resource sharing capabilities of the LLSAP to all member libraries.
5. Support patron initiated interlibrary loan for LLSAP members.
6. Provide training on how to effectively use tools for interlibrary loan beyond the LLSAP using OCLC and other appropriate discovery services. These FirstSearch classes are available to all system members and include reciprocal borrowing and access topics: FirstSearch Searching: Searching the Databases Like an Expert; FirstSearch Administration: The Basics. System members with full OCLC membership are encouraged to take the FirstSearch Interlibrary Loan class which includes a focus on copyright compliance.
7. Utilize training on the SHARE Polaris platform for all available modules across a variety of delivery methods. When appropriate, interlibrary loan, reciprocal borrowing and reciprocal access as well as copyright will be addressed.
8. Promote WebJunction learning database to further promote continuing education on interlibrary loan, reciprocal borrowing reciprocal access and copyright compliance.

9. Respond to the work being done by the statewide Delivery and Interlibrary Loan Revision committees by providing members with updated information and timely training in the areas of delivery, interlibrary loan, reciprocal borrowing, reciprocal access and copyright. It is anticipated that online and in-person formats will be incorporated to provide expanded educational opportunities for our multi-type membership.
10. Ensure that library staff understands the responsibilities for handling interlibrary loan materials.
11. Explore the cost and capability of interoperability with libraries independent of the LLSAPs.
12. Continued participation in the ISL LLSAP Policy Review and Standardization Project. Four staff members will support committee objectives and share updates with IHLS members.
13. Continue support of statewide initiatives designed to expand and enhance service to library patrons. This support would include the involvement of system staff, information dissemination as well as updated or new training opportunities for staff of member libraries.

Objective B: Provide a framework for members to participate in a state-of-the art integrated library system

Activities:

1. Develop a mature Memorandum of Understanding/Agreement for all LLSAP participants.
2. Act as legal and financial authority for SHARE.
3. Account for the reserve funds for each legacy LLSAP.
4. Evaluate the impact of the new uniform cost sharing formula on all LLSAP members and consider a modified formula for FY2015.
5. Evaluate current LLSAP policies and develop uniform policies for SHARE with the SHARE Executive Committee. Analyze trends in data and in the library marketplace to determine opportunities for changes and enhancements of LLSAP Services.
6. Participate in the Statewide E-Books Grant opportunity by implementing a SHARE 3M Cloud available to all SHARE members. Non-SHARE members will have the opportunity to participate in the Baker & Taylor Axis 360 consortium supported by RAILS.
7. Hire an E-Book Trainer/Coordinator utilizing grant funds, and provide additional administrative assistance to support the Statewide E-Books Grant opportunity.

8. Apply for appropriate grants to provide enhancements to the SHARE catalog.
9. Employ a variety of instructional methods to allow SHARE members to work effectively and efficiently with the ILS, and other shared databases.
10. Promote, as resources allow, new membership in the SHARE LLSAP. Promote the benefits of membership in the SHARE LLSAP through the following levels: Full, Transitional, Affiliate and CARLI Affiliate. Transitional and Affiliate members request materials through the SHARE PAC (public access catalog) by using an institutional membership library account, and receive delivery of materials through the IHLS courier service. Collections of Transitional and Affiliate members are not available in the SHARE PAC and IHLS will continually consider opportunities to more fully involve these members in resource sharing.
11. Assist with the migration of libraries who do not wish to continue to participate in the SHARE LLSAP.
12. Evaluate established criteria for SHARE LLSAP membership levels.
13. Continue to support the SHARE Helpdesk to track concerns and technical issues with the Polaris software.
14. Continue to offer SHARE member libraries a special IHLS/SHARE group purchase price for common third-party database products (e.g. Gale, Ebsco, Library Ideas, World Book). Available products and pricing information will be funneled through SHARE staff to all SHARE members. Ordering and invoicing will be coordinated by SHARE staff, thereby providing an incentive to vendors. A 1% handling fee is assessed for cost recovery.
15. Continue to provide SHARE web site that includes links to training modules and support materials in a variety of formats.
16. Provide software and technical support for members of the LLSAP.
17. Investigate the possibility of producing bar code labels in-house for member libraries as a means of improving uniformity of symbology and reducing cost to members.

Objective C: Ensure the integrity of bibliographic records.

Activities

1. Maintain the requirement that all bibliographic records (with the exception of equipment, on order and E-book) must be OCLC derived records and have an OCLC control number to ensure database standards and mitigate duplicate records.

2. Support a Cataloging Center operation for SHARE Full members for copy and original cataloging of MARC bibliographic records and the creation of local authority records to enhance recovery. Service options are: Cataloging Library (Full member meets continuing education requirements for cataloging staff and performs own cataloging); Barcoding A Library (Full member sends all new materials to Center for copy and original cataloging and assessed fee based on percentage of library's materials budget); Barcoding B Library (full member sends new materials as needed for original cataloging and assessed fee of $10 per item cataloged). Any item that meets the Cataloging Maintenance Center's (CMC) eligible collections criteria for free cataloging is passed on to the CMC.
3. Provide appropriate training for cataloging.
4. Evaluate the current methods utilized for ensuring the quality of the database through cataloging.
5. Evaluate the efficacy and fee models associated with the Cataloging Center operation for possible revision.

Objective D: Operate Cataloging Maintenance Centers on behalf of libraries in Illinois.

Activities:

1. Prepare Resource Description and Access (RDA) best practice guidelines for information resources in all formats and make them available via WebJunction.
2. Fulfill NACO (Name Authority Cooperative Program of the PCC) obligation by creating a minimum of 100 name or uniform title authority records per year.
3. Continue support of LLSAP database cleanup efforts in Illinois.
4. Develop two cataloging workshops to be made available in an online format.
5. Cooperate with Illinois State Library staff to identify statewide cataloging needs and develop strategies to meet them, prioritizing statewide initiatives that require cataloging expertise to ensure statewide access and resource sharing assisting with projects as agreed upon.

Goal II: Provide a sustainable delivery system that provides the best service possible for Illinois libraries and its users.

Objective A: Ensure that IHLS delivery of library materials is accurate, timely, and meets member library needs.

Activities:

1. Conduct quarterly counts of library materials and continue to refine the counting methodology.
2. Sort materials daily to ensure all materials are distributed during the next scheduled delivery.
3. Develop methods to deliver training to member libraries on labeling, packaging, and other preparation of library materials with the goal of improving delivery time.
4. Working in concert with ISL, RAILS, and CARLI, collect relevant delivery statistics and use them to improve and promote the service.
5. Continue to work collaboratively with RAILS to minimize size and type of tubs and other delivery containers, and number of different routing slips used.
6. Evaluate the average turn-around time that an item is in the IHLS delivery system and adjust as necessary, with the goal of reducing the time it takes for library patrons to receive requested library materials.
7. Conduct an annual delivery satisfaction and needs survey of member libraries and solicit recommendations from individual member libraries. Adjustments will be made based on need and feasibility.
8. Evaluate the current delivery routes and adjust as needed to improve delivery efficiency using the fleet management system.
9. Evaluate and modify, as needed, the IHLS delivery standards to improve delivery services to member libraries.

Objective B: Leverage existing delivery resources.

Activities:

1. Evaluate the current delivery routes for delivery efficiency.
2. Optimize sorting processes.
3. Implement a replacement schedule for delivery vehicles for FY2015, with fleet replaced when mileage exceeds 200,000 miles.
4. Develop and implement improved hiring practices and training for courier drivers and sorters (to include best practices in customer service, driving safety, ergonomics, and the handling of library materials.
5. Evaluate direct and overhead costs for sorting and delivery.

Objective C: Participate in the ISL Delivery Standardization and Delivery Pilot Program.

> **Activities:**

> 1. Participate in monthly meetings with operations staff from RAILS, CARLI, CPL and ISL.
> 2. Continue to assess and share the recommended best practices included in the Future of Illinois Library Cooperation report, prepared by the Illinois Library Association.
> 3. Continue to assess best practices included in the National Information Standards Organization's Physical Delivery of Library Resources report.
> 4. Explore groups of libraries in close proximity to each other for inclusion in a delivery pilot program.
> 5. Evaluate the redesign of IHLS routes to eliminate service to those libraries who may be participating in the delivery pilot program.
> 6. Develop evaluation methods to identify and measure goals of the delivery pilot program, including library member satisfaction.

Priority: Talking Book Program

Goal: Provide good customer service and well maintained machines to patrons of the Talking Books Program.

> **Objective:** Support the statewide machine lending program located in Carterville

> **Activities:**

> 1. Contract with the Illinois State Library to manage statewide services.
> 2. Serve all persons eligible for service within the state of Illinois as stipulated in the agreement with NLS.
> 3. Participate in the planning, coordination and evaluation of Illinois Talking Book Service, and ensure appropriate provision of services by staying informed of current procedures and trends related to Talking Books, the National Library Services/Library of Congress and librarianship in general.
> 4. Ensure the efficient and successful provision of service in accordance with the Revised Standards and Guidelines.

Priority: Provide timely and pertinent information to member libraries.

Goal: Communications among member libraries and partners

Objective: Provide various mechanisms to ensure good communications among member libraries and partners

Activities:

1. Hold regional face-to-face meetings to discuss system benefits as well as those benefits available to SHARE members.
2. Conduct an audit of IHLS communications to identify which communications are working well, which ones need improvement, and to identify other options or solicit suggestions.
3. Visits to 15% of our more than 550 agencies would give IHLS staff the opportunity to arrange approximately 70 on-site visits. After a hiatus of almost three years from this valuable activity, a particular area of focus would be those library agencies who have recently seen a change in leadership. Another target audience would be those libraries facing any challenges that might impact their membership status and their ability to receive system services. Also in consideration would be conversations with library boards or other administrative bodies who might request that information from IHLS.
4. Convene the Library Advisory Councils.
5. Maintain an interactive website to assist member libraries in effective utilization of IHLS services and promote member forums.
6. Utilize web conferencing tools to support member communications such as Connect with Leslie which uses the AdobeConnect platform.
7. Investigate feasibility of membership web portal to consolidate information that is relevant to each member.
8. In the event that the Decatur IHLS office is closed, the video conference equipment will be surplused and offered to our member libraries. The equipment at the Decatur facility is approximately 7 years old, and is not compatible with the newer H.323 standards. The screens are older style tube/CRT televisions and cannot support the higher resolution needed to clearly see screen sharing sessions from across the state. If an alternate location is found for staff in the area, then newer and more space effective equipment would be recommended.
9. The Carterville office still has its old video equipment that has not been used since the Illinois State Library offered grants to purchase new equipment. The old equipment will need to go through the surplus process for the equipment we will not repurpose in the organization.

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Priority: Administrative Activities

Goal I: Ensure effective utilization of IHLS resources

Objective A: Ensure fiscal accountability

Activities:

1. Support the business operations of IHLS through monthly financial reports, payroll, accounts payable, and accounts receivable.
2. Review the financial policies and procedures and adjust as necessary.
3. Support management decisions through the development of budgets and the analysis of financial information.
4. Explore options for electronic payment of bills by libraries as well as electronic payments by IHLS.
5. Sell Decatur facility and relocate staff at that facility.
6. Develop a five-year plan founded on the core services supported by the ISL which identifies cost saving or revenue generating measures consistent with IHLS mission and goals.
7. Dispose of all surplus equipment in a manner consistent with Illinois State guidelines.
8. In concert with Illinois State Archives, consolidate, archive, and or dispose of legacy and current system records currently housed in four locations. Order of preference is: Carterville, Decatur, Champaign, Edwardsville.
9. Implement new accounting software to achieve improved financial record keeping.
10. Consolidate all IHLS administrative records to a single location for efficiency. Establish an administrative file structure that follows record retention schedule set by the Illinois State Archives and provides remote access for staff at other locations.
11. Explore continued participation in the Plinkit Collaborative on the basis of revenue generation and member needs.
12. Provide cost recovery based continuing education opportunities for member libraries using external facilitators or presenters.
13. Develop a consulting service plan for implementation in a future service year utilizing constructive feedback from member libraries in concert with a long range plan.
14. Maintain IT support for IHLS staff including support of: videoconferencing, AdobeConnect, computer and server support.
15. Evaluate efficacy of appropriate staff telecommuting.
16. IHLS will continue to move services to our co-location facility in Champaign at the ICN POP site. All of the Polaris servers are located in the co-location site and other state-wide services such as

Plinkit, DNS and other administrative websites will be moved there.

17. In January 2013, The Decatur building was declared surplus. It was re-appraised and put on the market. An offer has been made on the property. After the appropriate notice to bid has been placed in the newspaper, the property will be prepared for sale. This will include developing a contract, changing title to the property, etc. It is anticipated that the property will be sold with new owners taking possession in the first half of FY2014.

18. A portion of the vacant land in Edwardsville is already under contract. It is anticipated that the sale will be consummated in the first quarter of FY2014.

19. The lease at the Carterville office will end June 30, 2013. Staff is currently identifying a suitable building for relocating operations for this hub. Possible locations have been narrowed down to two locations. It is anticipated that delivery will be moved by June 30, 2013 with the remaining staff moved by August 30, 2013. The current lease for the Carterville office area may be extended for no more than 60 days.

Objective B. Employ qualified, professional, accountable staff.

Activities:

1. Recruit and employ qualified personnel of diverse backgrounds to carry out the mission and goals of IHLS.
2. Develop and implement a process to evaluate staff.
3. Develop and implement performance-based salary adjustments.
4. Implement an enhanced hiring process.
5. Provide training to staff in areas of management and content specific to their areas of responsibility.
6. Seek and encourage participation in continuing education opportunities for staff as appropriate.
7. Provide one all-staff training retreat focused on staff collaboration and customer service.

Goal II: Partner with the Illinois State Library and other organizations to support statewide services.

Objective A: Maintain the accounting operation for the ILLINET OCLC grant project.

Activities:

1. Ensure adequately trained, professional staff are assigned to this project.
2. Provide required grant applications and reports in a timely manner.
3. Provide administrative support.

Objective B: Provide a web-based training and information tool for all library staff, volunteers, trustees and library students throughout Illinois,

Activities:

1. Provide resources to access articles, downloadable materials, case studies and links to relevant materials.
2. Enable library staff, volunteers and students to pursue professional development, continuing education, and leisure learning.
3. Provide webinars as part of a continuing education initiative for the Illinois library community.
4. Develop new content for the WebJunction Course Catalog.
5. Bring together ideas, resources and people from all types of Illinois libraries utilizing electronic media.
6. Enable interaction and collaboration with the goal of expanding and ensuring quality library services to the Illinois library community.
7. Provide the required grant applications and reports in a timely manner.