

**ILLINOIS STATE LIBRARY**  
**FY2019 Library System Annual Report Cover Sheet**  
**23 ILAC 3030.270 (Multitype Library System)**

**1. Narrative Report**

- 1.1 Narrative report containing an evaluative description of the system's activities and accomplishments for the year in light of the library system standards for core services specified in 23 ILAC 3030.215 and referring to the activities proposed in the FY2019 System Area and Per Capita Grant application.

**2. Financial Report**

- 2.1 FY2019 System Audit
- 2.2 System Member Fees and Revenue
- 2.3 System Non-Member Fees and Revenue
- 2.4 Capital Expenditures in Excess of \$5,000
- 2.5 Loans or Letters of Credit
- 2.6 Treasurer's Surety Bond

**3. Attachments**

- 3.1 Membership**
  - 3.1.1 Report of Changes in Membership
  - 3.1.2 Summary of System Membership
  - 3.1.3 Continuing Education/Training
  - 3.1.4 Delivery
  - 3.1.5 Member Site Visits
  - 3.1.6 Non-Resident Participation
- 3.2 Staffing**
  - 3.2.1 System Staff List
- 3.3 Board**
  - 3.3.1 FY2019 Board Meetings Held
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  - 3.3.2.b Assessment of 23 ILAC 3030.255, Board of Directors Policies
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  - 3.3.3 System Ethics Officer
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  - 3.3.5 Board Bylaws
- 3.4 General**
  - 3.4.1 Summary Appraisal of System Real Estate
  - 3.4.2 Inventory of Currently Owned Motor Vehicles
  - 3.4.3 Summary of Out-of-State Travel

**4. LLSAP Annual Reports**

**5. Delivery Annual Report**

Library System: **Illinois Heartland Library System**

Signed: \_\_\_\_\_

*Harvey Carter*  
Board President

Date: \_\_\_\_\_

*9/24/19*

Signed: \_\_\_\_\_

*Dolice L. Bednar*  
Executive Director

Date: \_\_\_\_\_

*September 24, 2019*



## FY2019 Annual Report

# ILLINOIS HEARTLAND LIBRARY SYSTEM

Imagining Tomorrow – Delivering Possibilities Today





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# Our scope of work

## **REFINE, RETURN AND RESTRUCTURE: THE HEARTLAND IN FY2019**

The benefit of reflection for Illinois Heartland Library System (IHLS) in FY2019 is the opportunity to pause and consider whether our strategies and plans met the needs of our member libraries.

Backed by continued and predictable operating funds and thanks to dependable forecasting models, our staff leaders and board members made financial decisions from a more comfortable place and with a good sense of future direction. We made strategic capital investments in hardware for our SHARE consortium (Sharing Heartland's Available Resources Equally) and delivery fleet vehicles. A welcome staff addition to our membership team made a considerable impact on our ability to connect with members. And our marketing communications methods were reinvigorated with the addition of a marketing professional.

The IHLS Strategic Plan, approved by the Board of Directors in October 2015 and placed on hiatus soon after due to the state's economic challenges, was reintroduced and reexamined by all stakeholders. As we develop rationale and initiatives for each goal in the strategic plan, we can confidently include some projects already in existence. Our SHARE staff reaches out to all IHLS members with eResource group purchase opportunities (when appropriate), expanding the reach of resource sharing. Cataloging Maintenance Center (CMC) grant staff developed outreach training programs to library staff statewide that improve library catalog accuracy and patron accuracy. Several IHLS staff presented at statewide and national conferences on topics within their fields of expertise, from cataloging to delivery and information technology.

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# REFINE & IMPROVE

## Supporting Member Libraries

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We continue to refine and improve our innovative library delivery method, initiated over two years ago. Sometimes referred to as *Functional 5-Day Delivery*, the basic premise is delivery to a member library when we have materials for patrons or the library has items to return. We eliminated volume-based delivery schedules and discovered no significant cost difference. The resulting impact at the member library level is that many members have significantly increased patron requests. Increased patron traffic often equates to more local support for the agency, and we could not be happier with the outcome!

The pages herein contain a snapshot of our organization's activities in support of the FY2019 Operational Plan submitted May 24, 2018, to the Illinois State Library. For ease of review, this report follows the FY2019 Operational Plan as much as is practical.

Looking back, we appreciate the opportunity to reconsider the projects and activities we engaged in on behalf of our members. May it serve all of us well as we advance through FY2020.

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# Communication

The role of communication in our organization is paramount, and IHLS maintains its focus on both the medium and the message. In FY2019, the *Member Connection* e-newsletter moved from a flat design read in its entirety within an email message (or web browser) to a dynamic version featuring portions of articles that link to full pieces on our website. This approach has the double purpose of building valuable web content and driving readers to the website while also allowing IHLS staff to track clicks to better determine what content is in demand. It also allows readers to skim articles and select those most pertinent to their information needs.

Zoom videoconferencing software continues to provide a stable platform for member and non-member interaction. Our board and SHARE committees rely on the technology for meetings. In addition, the SHARE consortium has utilized Zoom for town hall-style meetings when large attendance is anticipated. IHLS also maintains an additional license for use by groups outside of our organization, such as ASGCLA Physical Delivery Group (the Association of Specialized, Government & Cooperative Library Agencies, a division of the American Library Association), the Rebecca Caudill Young Readers Book Award Board of Directors, Think Outside the Barn, and Reaching Forward South.



Member  
**CONNECTION**



Connecting Libraries & Communities in Central & Southern Illinois

# Marketing

Our marketing and marketing communications strategy took a purposeful step forward with the addition of a full-time marketing professional in the second half of the FY19. Members noticed an improved look and feel of messaging throughout all channels, including library type-specific Facebook and email messages. Leadership staff benefited from the insight of cross-tabulation analysis of our strategic plan survey to members. An early marketing coordinator project involved promotion of a Design Thinking class for members and IHLS staff. Budgeted as a partial fee-recovery event, it was marketed with early bird pricing. This increased interest and registration and helped bring in revenue above cost-recovery. During the two one-day trainings, brought in experts in design thinking, a new, alternative project development method, to members from across our service area and to most of our staff. This marked a return to continuing education outside the bounds of resource sharing, cataloging, and delivery and helped kindle a relationship between IHLS and Chicago Public Library.

Marketing Coordinator  
Shandi Greve Penrod





Staff development remains a high priority for IHLS. We give our best to members and to each other when we are professionally prepared and intellectually stimulated. All IHLS staff are encouraged to participate in low- and no-cost professional development opportunities. When possible, team members support each other to gain knowledge outside of our daily roles by attending classes and webinars together. In FY19, our staff:

- Attended 102 seminars
- Completed 163 online training courses, and
- Initiated 93 additional online training courses



# Utilizing Technology

Our IT (information technology) team makes the work of our staff, and sometimes that of our members, more effective and efficient. A relatively small team of professionals maintains the highest levels of data integrity across the many platforms necessary for our information-heavy agency. Internally, IHLS staff moved to Microsoft Teams, providing improvement in cross-functional team communication. Along with daily operation support, the IT team upgraded our Champaign office network with new Wi-Fi access points, network switches, and the removal of surplused hardware. An unplanned but absolutely necessary replacement of the Uninterruptible Power Supply (UPS) rounded out the server room improvements in Champaign. In our Carbondale, Champaign, and Edwardsville offices, staff completed time clock (hardware) installations to support improved documentation for our finance and human resources staff.

The IT team's largest customer is the SHARE consortium. SHARE, being the largest library resource sharing organization in North America, requires scalable technological support for its 341 member agencies. Following several months of configuration testing, in FY2019 new SHARE servers were placed into service, resulting in a 300% increase in speed for library users and statistical report performance. The servers meet or exceed the organization's high standards for long-term affordability, hosting preference, performance, and service level while providing multiple levels of data redundancy.





# Information Technology

## Service and Support

Our web developer has a knack for crafting scripts that help SHARE libraries focus on patron service. Many member libraries now use his Polaris Integrated Library System (ILS) script that allows front desk staff to help patrons sign up for text messaging services. With the proliferation of cell service carriers, this is not as easy as it would seem. Basically:

- Library staff enter a patron cell phone number in a custom website.
- The patron receives a text message indicating the actual cellular carrier and informs library staff.
- Library staff correctly assign the patron SHARE texting service. Member libraries can now confidently send hold notifications, almost-overdue notices, and other automated Polaris messages to their patrons via text messaging.

Support of our very large multi-type library membership takes many forms. We strive to meet personally either at a home library, networking or continuing education opportunity, or board meeting. We are committed to providing assistance when requested so members can make the best choices for their patrons and library.

Seven years of support and maintenance experiences with the Polaris ILS in a consortium the size of SHARE has provided our IT team a wealth of knowledge. We frequently consult with agencies considering the Polaris software and with those merging smaller consortia into a larger one. This year, team members had opportunities to share their expertise and insight at national and state levels. The annual Innovative Users Group Conference features presentations specific to Polaris and Sierra/Millennium ILS, developed by Innovative Interfaces Inc. Our presentation focused on both the administrative and network aspects of the large SHARE server upgrade, was well-attended, and garnered additional conversations post-conference with colleagues. We presented the administrative perspective at a state-level meeting and focused on:

- Determining need for a server upgrade
- Gaining buy-in from libraries
- Importance of a reserve fund for capital purchases (vendor and technology type)

# Membership



This year, we doubled our membership team with the welcome addition of a highly experienced membership coordinator. Additional staff has allowed consistent participation in member-driven networking groups, allowing IHLS to be physically present in all geographical parts of the system. Such partnerships have made a significant impact on our ability to reach out to libraries facing challenges from city and village governments. Outreach to public library boards coincided with our stated goal for the year of developing resources and training for these stakeholders.

IHLS also identified a need for training of public library boards to foster consistent, effective, and legally compliant library governance. This was confirmed by our membership when, Ryan Johnson, Assistant Director of the O'Fallon Public Library, and Ashley Stewart, Director of the Caseyville Public Library District, approached IHLS to share their concerns regarding trustee training and development. Together with our membership coordinator, the two public library leaders shared ideas and launched a continuing series of Trustee Development events. The first event, Forging Strong Relationships Between Library Boards and Directors, was held May 11, 2019, at Edwardsville Public Library.

## IHLS MISSION

To support member libraries of all types in providing quality library services. IHLS facilitates access to shared resources, advocates for libraries, promotes innovation and develops community partnerships.



## ILLINOIS HEARTLAND LIBRARY SYSTEM EMPOWERS LIBRARIES TO EMBRACE INNOVATION AND COLLABORATION.



Member-focused training included IHLS Member Day—our premier continuing education event. Set in September 2018, we focused on content with additional attention to the experience of the day. We utilized an internal team lead by a project coordinator to implement the event as an experience. Beyond our training initiatives, we were able to promote and participate in training supported by our members. The increased visibility of our membership staff allows members to reach out to us when they are working on projects which, in turn, helps everyone. Member-driven training in FY19 included:

- Librarian's Guide to Homelessness, sponsored by the Six Mile Regional Library District. Presented by the Homeless Training Institute, the session provided attendees practical tips and a deeper understanding of the challenges faced daily by those experiencing homelessness, mental illness, trauma, or addiction.
- Intellectual Freedom and Professional Ethics in Libraries, the senior project of Jamie Wratchford, Assistant Director of Morrison-Talbott Library in Waterloo. This IHLS-supported program attracted more than 75 attendees and featured Jamie LaRue speaking on Intellectual Freedom. A significant number of IHLS staff also participated in the daylong event, working toward our goal of developing a group of staff advocates for libraries.

A photograph of two women with long brown hair, smiling and looking at a tablet held by the woman in the foreground. The background is a soft, out-of-focus light blue.

## Membership Communications

### **We meet our members where they are!**

IHLS utilized various communication channels to promote membership involvement in statewide library initiatives and training opportunities. Conferences such as the Illinois Library Association, Association of Illinois School Library Educators, and Reaching Forward South offer members a variety of networking and continuing education opportunities. All three are supported financially by our organization, and several of our staff also participate. We advocate for member participation in leadership activities including Directors University and Illinois Libraries Elevate through participation in planning committees, event attendance, financial support of the event, and financial support for members should the costs of attending represent a burden for the home library.

Communication with members is also about more than the message. It also involves a sensitivity to meet members where and how they are. From the most basic connectivity of utilizing chat functionality for monthly Director's Chat sessions to the more robust Zoom technology supporting quarterly Members Matter meetings, we purposefully meet our members where they are rather than solely by methods that are convenient to us.



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# Finance

Our finance team are active participants in planning, decision making, and contribute positively to projects across our organization. They support both members and fellow staff in every department through eResources billing and financial transaction and statement reporting for SHARE and IHLS governance. Also, by placing a focus on forecasting in budget preparations, we are better stewards of public funds. This year witnessed the achievement of several improvements thanks to the knowledge and talents of team members:

- Initiated an annual budget development process initiated in a more timely manner, streamlined, and intertwined with development of the Operational Plan
- Improved training for budget managers
- Supported Human Resources Generalist in order for her to complete additional priorities
- Examined property and casualty insurance during budget development resulting in a new broker relationship with value added benefits to the organization
- Coordinated staff travel arrangements and monitoring of expenses leading to greater efficiencies and organization

The finance department has reached a level of organization and institutional understanding thanks to dedicated and intelligent colleagues. In FY2019, they worked as a team to tackle a forecasting challenge no one anticipated: the increase of Illinois' Minimum Wage to \$15 an hour by January 1, 2025. While all hourly staff begin above the current \$8.25/hour minimum wage, IHLS will have to make adjustments to salary schedules impacting 60% of our colleagues. Senior team members researched and forecasted the impact of the wage increase on our organization and identified several scenarios for consideration by our leadership team. We anticipate our direction will be set before the arrival of FY2021, and are moving forward with research, marketing, and advocacy tools to chart the best possible course for our organization and the members we serve.





# Bibliographic Access

Cataloging is the essential component of any bibliographic database, allowing patrons and staff to easily retrieve the materials they need. Appropriately and systematically classified library resources require a penchant for access points, a knowledge of current cataloging conventions, and an awareness of display functionality in the public access catalog (or PAC). The SHARE catalog of 1,691,854 unique bibliographic records demands this level of data accuracy for a satisfying library patron experience.

A realignment of staffing within the SHARE Bibliographic Service team in FY2019 led to a program-based approach to project management. Two mirrored sides operate in the department, both providing the same types of services albeit for generally different sets of customers and end users. The 341 SHARE member libraries and patrons they serve in central and southern Illinois rely on our Bibliographic Services staff for cataloging training, original cataloging services, and database management. Additional IHLS member libraries and Reaching Across Illinois Library System member libraries and agencies utilize these same services under the auspices of the Cataloging Maintenance Center grant, which mirrors SHARE cataloging services in almost every way. All of our cataloging staff train together, work side by side, and collaborate on challenges and opportunities to benefit resource sharing across the state. The end result—improved patron services—drives everything we do.

Cataloging services in FY2019 for our SHARE members included:

- 1,100 original bibliographic records created
- Over 3,200 fee-based bibliographic records updated and completed for member libraries. Also referred to as “\$3 bibs,” this option allows member libraries to select their staff level of cataloging commitment, often freeing up time to provide other patron service such as programming, research and outreach to the community.
- Produced more than 200 authority records, or the “traffic cops” of library catalogs that direct patrons to the agreed-upon subject headings and proper names.



# Cataloging Training

## NEARLY 3,000 CONTACT HOURS OF TRAINING!

Seven years ago, members of the SHARE Consortium agreed their very large database, comprised of bibliographic and authority records merged from four legacy library automation groups, would maintain strict levels of accuracy. We achieve these exacting standards by providing cataloging training for member library catalogers and requiring a minimum of 15 hours of continuing education in the subject each fiscal year. Most consortia catalogers exceed the benchmark. Member library staff may attend training provided from a variety of sources. In-house learning is available in person, via videoconferencing and live webinars, plus recorded training available on SHARE's members only platform. SHARE provided nearly 3,000 contact hours of cataloging training to a total of 1,335 participants in FY2019 through a variety of topics and presentation formats:

Class Title	Total Participants	Total Training Hours	Notes
Catalogers Training Sessions	959	1,918 contact hours	361 participants watched recorded sessions
SHARE Barcoding	226	611 contact hours	
SHARE Reports	30	85	
Book Cataloging	31	93	
Searching and Editing in OCLC	28	84	
Introduction to Authority Control	20	60	
Dewey Decimal Classification	18	54	

# Cataloging Maintenance Center

## SERVING ILLINOIS LIBRARIES STATEWIDE

Cataloging Maintenance Center (CMC) staff perform the same tasks as their SHARE colleagues with a larger audience in mind. Thanks to a generous grant from the Illinois State Library, IHLS has been responsible, via the CMC, for database maintenance, original cataloging, and cataloging training of libraries and library automation groups statewide for several years. We are able to repurpose our heavily researched SHARE bibliographic training materials and make slight adjustments given that the majority of CMC training is based solely on cataloging conventions such as RDA (Resource Description and Access—the current national cataloging standard) and are independent of any local library's integrated library system or ILS.

In FY2019, we soon understood the extent of need, and therefore scalability, of CMC's online training. Staff achieved a stated goal to reach out via training in a significant way with two new training offerings. They initiated a series of web-based classes titled Online with the CMC; each dived into a single aspect of cataloging and avoided focusing on any particular local practice. With engaging titles like On the Basis of Genre (subject headings), Out with the Old, in with the New (weeding), and It's a Date (publication dates), CMC trainers reached an average of 81 attendees per session offered during the year. All sessions were also recorded for later viewing and available on the CMC website at [www.illinoisheartland.org/cmc/online](http://www.illinoisheartland.org/cmc/online).

CMC also provided in-depth training through two online series established more like college-level training. Online RDA (Resource Description and Access) Book Cataloging and Online RDA for Audio and Video Recordings were demanding sessions for attendees and trainers alike. These details demonstrate the complexity and depth of learning environment:

- RDA Book Cataloging class was offered for 2 sessions, totaling 115 total participants and 1,725 continuing education credits.
- RDA for Audio and Video Records offered for 1 session, totaling 43 participants and 645 continuing education credits.





## On-Demand Sessions

### IMPACT ON MEMBERS

CMC staff offered in-person cataloging workdays to a total of 17 participants over the course of the year. The by-request sessions equated over 100 contact hours. Student feedback illustrates the need for the advanced level of training and its value to libraries statewide.



*"Dr. Thomas, our course is ending but I wanted to tell you thank you for a number of reasons. ... I came away with a strong sense of what areas I need to delve into in order to create an accurate picture in my mind of what RDA is and how to utilize it within cataloging. ... Please continue to do this because it is necessary. ... I attend many conferences/webinars where I feel, because I work at a smaller library, many of the concepts presented are only applicable to bigger libraries due to budget constraints etc."*

*Katelynn Clark  
Three Rivers Public Library District*

Realignment within our cataloging staff allowed us to create a project manager for the CMC grant and to add a metadata cataloger. Now a more robust program, it strengthened our ability to assist with cataloging and digitization projects statewide. We completed the long-term transcription project of Southern Illinois University of Edwardsville University Archives' collection of naturalization and immigration records. Other unique cataloging projects this year included sheet music, oral histories, and foreign language materials including Bulgarian and Romanian monographs. In total, more than 1,200 new or unique library items are now discoverable in library catalogs across the state due to original cataloging by the CMC.

# Delivery

Delivery of library materials is the single system service that touches nearly all of IHLS-member libraries. In FY2019, 490 out of our 524 multi-type member libraries received items via IHLS Delivery staff. A bedrock of resource sharing, it is provided to all member libraries thanks to our annual operating grant—the System Area and Per Capita Grant (SAPG). The dramatic changes to our delivery program based on a partnership with the Laboratory of Applied Spatial Analysis at Southern Illinois University Edwardsville (LASA) continue to improve services to our member libraries and the patrons they serve. The future of statewide library service may benefit from a similar relationship.

Approximately 89% of Illinois libraries serve a population of 15,000 or less. The old delivery model relied on the lens of borrowing and lending frequency—effectively penalizing patrons of small libraries. External modeling and internal statistics illustrate the access to 5-day-a-week delivery service, with its accompanying change to our routes, hub boundaries, and workflow, was achievable with our current level of funding and delivery fleet. More importantly, increased access to library materials can be a game changer for communities in our service area. It levels the playing field and puts the library on par with other community agencies.



*Delivering Possibilities*



# Enhanced Availability of Resources

Larger member libraries generally receive delivery Monday through Friday and may not notice the change to 5-day-a-week delivery. Enhanced availability of resources in small and medium communities tell most of the story:

Library	FY18 Totals	FY19 Totals	Increase/ Decrease %	LLSAP
Du Quoin HS	914	560	-354 (-39%)	Yes
Eldorado PL	11,114	10,730	-384 (-3%)	Yes
Greenfield PL	5,604	6,166	+562 (10%)	Yes
Harrisburg PL	14,283	13,895	-388 (-3%)	Yes
Kitchell Memorial Library	4,015	3,740	-275 (-7%)	No
Metropolis PL	11,148	10,828	-320 (-3%)	Yes
Atwood Hammond Schools	2,700	3,077	+377 (14%)	Yes
Camargo Township	8,608	9,680	+1,072 (12%)	Yes
Chrisman Public	3,456	3,960	+504 (15%)	Yes
Loda Township	1,963	3,647	+1684 (86%)	Yes
Melvin Public	2,345	2,411	+66 (3%)	No
Milford Schools	928	1,071	+143 (15%)	Yes





As we analyzed the true costs to provide delivery services in FY2018 and FY2019, some trends emerged.



**Overall cost for delivery increased slightly in FY2019.**

FY2018 total delivery cost  
\$1,405,365.59

FY2019 total delivery cost  
\$1,575,280.13

This modest increase is attributed to 3 factors:

- *3% cost of living adjustment*
- *increase in total delivery vehicle repair costs*
- *rise in fuel costs*



**Total miles driven per year decreased.**

1,178,011 miles in FY2018

1,167,250 in FY2019

215 miles less per week!

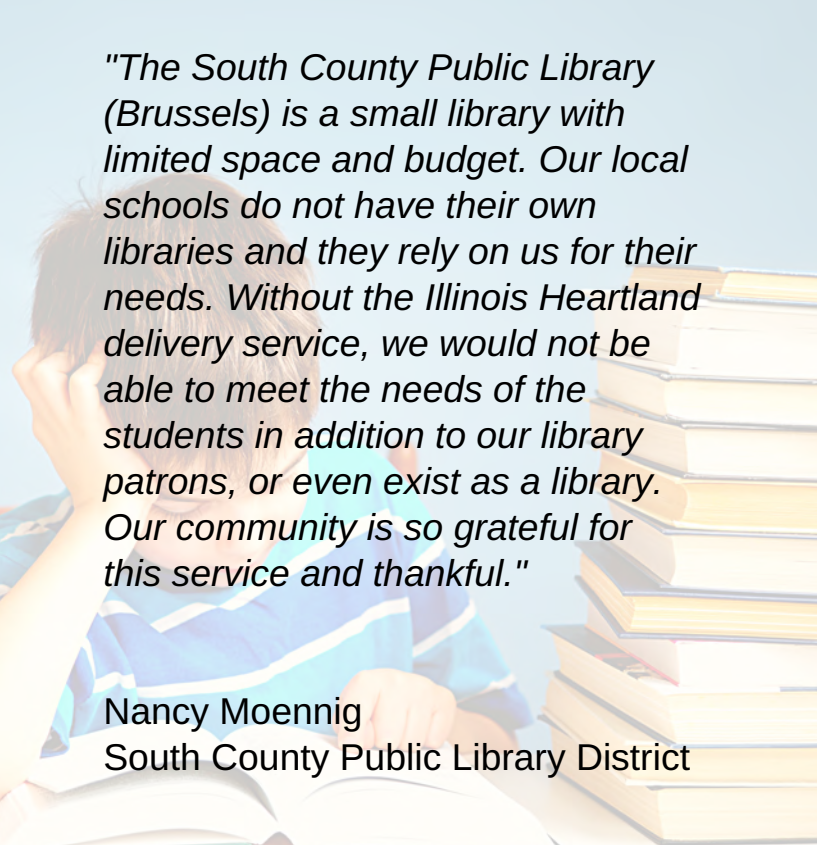


**Stops per year increased as cost per stop increased.**

Delivery Stops  
FY2018 = 70,110  
FY2019 = 70,639

Cost Per Stop  
FY2018 = \$20.05  
FY2019 = \$22.30





*"The South County Public Library (Brussels) is a small library with limited space and budget. Our local schools do not have their own libraries and they rely on us for their needs. Without the Illinois Heartland delivery service, we would not be able to meet the needs of the students in addition to our library patrons, or even exist as a library. Our community is so grateful for this service and thankful."*


Nancy Moennig  
South County Public Library District



*"I just wanted to thank the system for including our library in the 5 day a week delivery. We have received so much positive feedback from our patrons with the speed of which their items arrive at our library. We appreciated the three day a week delivery, but this 5 day a week delivery has really helped us to improve our services, especially in a world where 1-day shipping is available, we are able to keep up."*

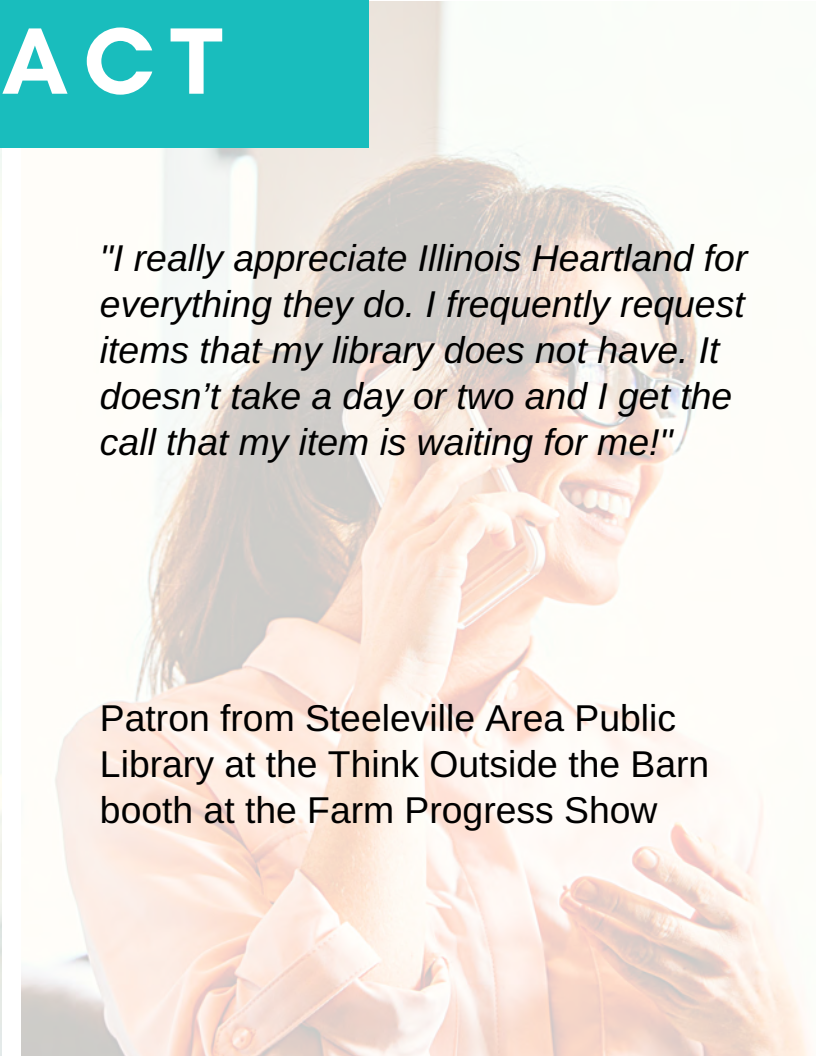
Jackie Wells, Director  
Camargo Township District Library

## DELIVERY'S IMPACT



*"The delivery people are great, we can count on them being on time, they are very helpful. We are an unserved rural school. Our students depend on IHLS, SHARE and ILDS in order to meet their educational needs. Our library would not be as valuable to our district without this service."*

Mary Richars  
Dieterich CU #30



*"I really appreciate Illinois Heartland for everything they do. I frequently request items that my library does not have. It doesn't take a day or two and I get the call that my item is waiting for me!"*

Patron from Steeleville Area Public  
Library at the Think Outside the Barn  
booth at the Farm Progress Show

# Statewide Delivery Services

FY2019 saw the beginning of conversations between ISL, IHLS, RAILS, and LASA regarding future efficiencies for delivery statewide. The discussion and research to date are intriguing, and we look forward to representing IHLS as we continue meeting in FY2020.

## Possibilities for improvement

include a change in overnight location for northern-southern library system delivery exchange (the current location is our Champaign office); initiation of delivery without regard to current library system borders; and changes in delivery hub locations.

Given our experience with the expansion of delivery access within IHLS, the statewide potential could lead in many directions!



# 520+ Member Libraries

In Central & Southern Illinois



# Resource Sharing

## SHARE

Library environments in the 21st century embrace resource sharing in multiple forms. Our 524 multi-type IHLS-member libraries offer their patrons varieties of sharing systems to meet their information needs, from standalone catalogs of a single library's holdings, to a school district's multiple libraries shared to all their students, to a large regional automated library group sharing resources across thousands of miles. The common denominators are access and service. Our SHARE Administrative and Resource Sharing teams facilitate these activities within the boundaries of our 28,000-square mile library system service area.

SHARE staff moved resource sharing forward this year through several activities. Patron outcomes were improved via upgrades to the consortium's software platform, training opportunities for member-library staff, leadership at the regional and statewide level, advocacy resources, and support for new members of the consortium. The Polaris ILS has proven to be a sturdy and capable partner for our 341 SHARE-member libraries providing service at over 470 locations in central and southern Illinois. During the year, staff rolled out a significant software upgrade with several enhancements to the staff client. This enhanced cataloging and, especially, the public access catalog for patrons. Our SHARE and IT teams prepared members via a large Zoom meeting featuring demonstrations of the new features and opportunities for questions throughout. As with most of our training, the event was recorded and available via the website for additional member participation. Members were informed of the upgrade well in advance via newsletters and listservs. The roll-out was nearly seamless—a result of careful planning and coordination with our staff.

A decorative graphic on the right side of the page. It features the word "SHARE" spelled out vertically in large, light-colored wooden block letters. The letters are arranged in a slightly staggered, three-dimensional fashion against a dark, textured background. At the bottom of the page, there is a cluster of various other wooden letters and symbols, including "X", "F", "P", "V", "G", and "W", scattered haphazardly.

# Share Executive Council

The SHARE Executive Council and sub-committees moved forward in several policy areas to advance member engagement, and patron experience and to build shared collections:

- Clarified the policy for patron registration exceptions referred to as the one-person-one-card rule. This applies to library staff, children of divorced parents, and property owners.
- Established a conflict resolution policy for SHARE members regarding intra-library loan. Members now have a guiding policy to address conflict between member libraries.
- Approved a \$300 referral bonus for SHARE members who refer new libraries to the SHARE program.
- Offered an additional opt-in for eResource (i.e. cloudLibrary) consortium members to increase its budget. SHARE-member libraries have the choice to add more collection development funds on their invoice or to pay the originally billed amount. Libraries who opt-in can use the extra fee for the consortium manager to choose additional titles on their behalf. This is in addition to the existing program for libraries to also purchase on behalf of the consortium. This can grow the existing collection and has appeal for other eResource consortia, as well.

## A Seat at the Table

Several of our staff are involved at the statewide library consortia level. A current challenge for library automation groups across the state is reconciliation of consortia catalog holdings with OCLC WorldCat—widely acknowledged as the bibliographic database standard. The software product most groups use is retiring in 2020, and as of now there is no statewide standard going forward. SHARE staff have a seat at the table as our peers discuss the impact of inconsistency across shared bibliographic databases.





## TOOLS

SHARE staff created an ROI infographic to help member libraries demonstrate their value to patrons.

# Advocacy

SHARE resource sharing staff guided 6 transitional member libraries to full membership in the consortium. Go Live assistance and circulation training (basic and advanced) provided support for successful migration into the consortium.

Inspired by data compiled from the SHARE database, SHARE staff created a customizable return on investment (ROI) infographic for public library members. A “you saved” figure represents the total replacement value of items borrowed during a calendar year by a library’s patrons. This is part of an advocacy message to communicate the millions saved through library use to our member libraries’ communities. Several members garnered positive media coverage as well. The same or similar kinds of information from the database can be used at checkout on patron receipts.

# WHAT WE DO



## *Innovation*

The sample ROI infographic can be found on the Resources for Libraries webpage on the IHLS website at <https://www.illinoisheartland.org/resources-for-libraries>.

Available to all stakeholders, our resource sharing staff update the offerings as necessary with free or low-cost tools to assist libraries in all facets of service. The curated list includes learning sites, American Library Association division links, technology discount providers for libraries, and reference tools in the age of fake news.



## *eResources*

Perhaps the most significant resource we provide to members (in addition to our time and talent) is the exploding landscape of eResources. eBooks alone have proven so popular with patrons that potential SHARE member library boards inquire about the availability of this resource in tandem with joining the consortium. eResources draw patrons to libraries who have not visited in years. They have unique purchase, licensing, and lending requirements. And eResources are not necessarily ILS-dependent.





Our largest group of eResource members are subscribers to cloudLibrary from bibliotheca. Thanks to its interoperability with Polaris, cloudLibrary access occurs within the database creating a seamless patron experience for SHARE library patrons seeking eBooks and eAudiobooks. In FY2019 Pay-per-use (PPU) eAudio titles were added to the collection significantly widening collection offerings. The addition allows participants to stretch their collection budget and has proven quite popular with patrons. CloudLibrary is ILS-dependent. Nearly two-thirds of SHARE libraries participate in the cloudLibrary shared collection via group purchase.

Again, this year we report encouraging usage statistics:

- A little over 1,000 items circulate each day from the collection.
- 18,213 unique patrons utilized 43,703 items from the cloudLibrary (including 6,930 eAudiobooks) in FY2019.
- Pay-per-use eAudio collection provided a great ROI. The overall cost to SHARE patrons to borrow 16,553 items in FY2019 was \$23,810. If SHARE had purchased all those items for the owned collection it would have totaled \$103,575.34!

The RBdigital eBook, eAudiobook, and eMagazine shared collection in FY2019 was supported by 56 IHLS public libraries. As opposed to cloudLibrary, the platform is not ILS-dependent and represents an extension of eResource sharing beyond the SHARE consortium:

- 1,648 unique patrons accessed the collection this year.
- 7,761 items were circulated in our RBdigital eBook and eAudiobook collection.
- There were 34,949 eMagazines borrowed from the eMagazine collection made up of 64 current magazine subscriptions. Depending on the title, eMagazines are issued monthly or weekly and back issues are always available.

Our organization is committed to the slow and steady expansion of resource sharing across the IHLS membership. The popularity of RBdigital collections utilizing a variety of automated library platforms is proof positive that there are many options to connect our membership across our service area.



# Financial Report

## 2.1 FY2019 System Audit

Attachment 2.1

## 2.2 System Member Fees & Revenue

<b>The SHARE fund contains LLSAP user fees from member libraries in the following categories:</b>	
- Cloud Subscription	\$103,099
- ICN Filtering	\$157
- SHARE SAM Fee	\$13,653
- SHARE Additional Module Fees	\$25,300
- SHARE Bibliographic Service Fee	\$82,162
- SHARE LLSAP Full Member Fees	\$1,042,119
- SHARE LLSAP Transitional Member Fee	\$4,695
<b>The SHARE fund contains LLSAP group purchase fees from member libraries in the following categories:</b>	
- SHARE Group Purchase Subscriptions	\$136,883
- SHARE eBook Purchases	\$65,434
<b>The General fund contains program attendance and purchase fees on behalf of member libraries in the following categories:</b>	
- Design Thinking Workshop	\$4,300
- Dreamhost Domain Name	\$455
Total:	\$1,478,257

## 2.3 Non-Member Fees & Revenue

ERate Funding	\$5,384
Asset Surplus Proceeds	\$30,700
ILDS Contract with RAILS	\$250,325
Total:	\$286,409
ILLINET/OCLC Group Service Fees	\$4,445,618
ILLINET/OCLC Monthly Network Transactional Billing	\$678,851
Total:	\$5,124,469



## 2.4 Capital Expenditures In Excess of \$5,000

General Fund Expenditures	Expense
<b><u>Building &amp; Improvements</u></b>	
CHA:Building Remodel	\$8,801.10
Total:	<b>\$8,801.10</b>
<b><u>Capital Projects Fund Expenditures</u></b>	<b><u>Expense</u></b>
<b><u>Building &amp; Improvements</u></b>	
CHA:Kitchen Remodel	\$8,732.00
CHA:Exterior Painting	\$6,000.00
Total:	<b>\$14,732.00</b>
<b><u>Vehicles</u></b>	
2019 Ford Transit Delivery Vans (6)	\$160,500.00
Total:	<b>\$160,500.00</b>
<b><u>SHARE Fund Expenditures</u></b>	<b><u>Expense</u></b>
<b><u>Computers</u></b>	
Battery Backup	\$8,250.00
PowerEdge Server & Hot Plug Drives (24)	\$101,431.93
Total:	<b>\$109,681.93</b>

## 2.5 Loans & Letters of Credit

As of June 30, 2019, there were no outstanding loans, letters of credit or grant anticipation warrants for IHLS.

## 2.6 Treasurers Surety Bond

Attachment 2.6

## 3.1.1 Changes in System Membership

### AGENCIES ADDED

Potomac Public Library District  
Board Action November 2018

Vienna Correctional Center  
Board Action April 2019

Lincoln Correctional Center  
Board Action May 2019

### STATUS CHANGES

East St. Louis Learning Resource Center  
Reclassified as a special library  
Board Action April, 2019

IHLS has no developmental members





## 3.1.2 Summary of System Membership



**524 Member Libraries**

### 3.1.3 Continuing Education/Training

## IHLS Continuing Education & Training

IHLS provided 360 events or programs during FY2019, for 2,821 participants, who spent a total of 8,354 contact hours in training activities.

CE events offered by IHLS included forums for discussion groups such as IHLS Directors' Chats and Members Matter meetings.

Training events offered for IHLS Board Members included Intellectual Freedom, The Librarian's Guide to Homelessness and Big Talk for Small Libraries, to name a few.



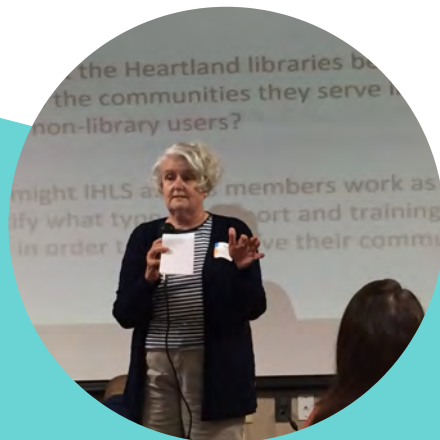
## SHARE Continuing Education & Training

SHARE sponsored 186 events, programs, or classes, which provided CE for 1,666 participants, 483.5 contact hours, and 4,203 total CE hours.

The CE events in Library Learning include those offered by SHARE, such as the Local Library System Automation Project.

Training was offered on all aspects of circulation and cataloging in Polaris, use of eResources and technology, and managing resource-sharing in a large consortium.





# Design Thinking for Libraries

To answer the continuing education needs of our members, IHLS offered this one-day seminar facilitated by staff from the Chicago Public Library. There were a total of 164 attendees including member library staff and IHLS staff.

## 3.1.4 Delivery

Total number of items transported =

SHARE (Polaris) counts + counts for non-automated libraries (IHLS/ISL/RAILS (incoming items only)

A photograph showing several hands of different skin tones holding up books of various colors (green, grey, red, orange) against a light background.

4,505,471

A photograph of a paved road with yellow double lines, curving through a dense forest with green trees under a clear sky.

23,345

Average number of Delivery miles traveled per week

IHLS saved 215 miles per week from FY2018, while continuing to provide 5-day-a-week delivery.

Average number of direct delivery stops per week

The average weekly stops increased by 64 since FY18.

A photograph of a white delivery van parked on a street. The van has the IHLS logo and website on its side. The text "IHLS Illinois Heartland Library System" and "www.illinoisheartland.org" are visible. A phone number "520-520-5200" is also present.

1,412



### 3.1.5 Member Site Visits



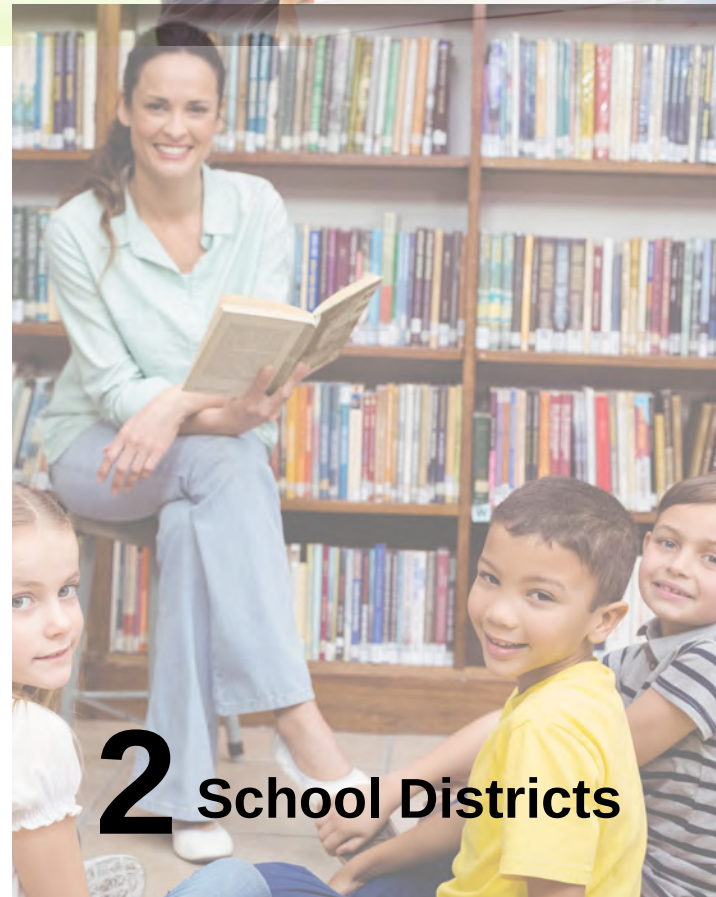
**9** Special Libraries



**2** Academic Libraries



**64** Public Libraries



**2** School Districts

### 3.1.6 Non-Resident Participation

The URL for the listing of public libraries in IHLS with indication of whether they are participants in the non-resident fee program is:

[www.illinoisheartland.org/members/non-resident-fee](http://www.illinoisheartland.org/members/non-resident-fee)



## 3.2 Staffing

IHLS employs 122 people in 7 departments. System staff is comprised of many talented people including catalogers, drivers, sorters, administrative staff and IT techs. All dedicated to carrying out the vision, mission and values of IHLS and providing excellent service to member libraries.



Staff development is crucial to attracting and keeping professionals on the IHLS team. Training and education are available with online classes and seminars through Fred Pryor and Lynda.com in addition to the annual Staff Day and professional conferences.

Staff also work together as a team on a variety of projects in addition to advocating for libraries and the system by attending community events and programs.



### 3.2.1 Workweek Hours, Salary Schedule, System Staff List (attachment 3.2.1)



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## 3.3.1 FY2019 Board Meetings Held

The regular meetings of the Board of Directors of the Illinois Heartland Library System will be held on the fourth Tuesday of the month at the Illinois Heartland Library System Edwardsville location. There will not be a regularly scheduled meeting for the month of December. Each meeting will begin at 5 p.m. All Board and committee meeting agendas are posted on the Illinois Heartland Library System website.

July 23, 2019

August 27, 2019

October 29, 2019\*

November 26, 2019

January 28, 2020

February 25, 2020

March 24, 2020

April 28, 2020

May 26, 2020

June 23, 2020

\*Date changed to the last Tuesday of the month due to a scheduling conflict

## 3.3.2a System Board Members

**THE AWESOME PEOPLE BEHIND THIS ORGANIZATION**

Sara Zumwalt,  
President



217-324-3866

[szumwalt@board.illinoisheartland.org](mailto:szumwalt@board.illinoisheartland.org)

June 2019

Stacey Carter,  
Vice-President



217-877-0353

[scarter@board.illinoisheartland.org](mailto:scarter@board.illinoisheartland.org)

June 2020

Sandy West,  
Secretary



618-559-1033

[swest@board.illinoisheartland.org](mailto:swest@board.illinoisheartland.org)

June 2021



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*"I believe strongly in the importance of providing all students the school library they deserve with an inclusive and welcoming space, high quality and engaging resources."*

Melanie Weigel, Zion CUSD#3

Bev Obert, Treasurer



217-578-2515

bobert@board.illinoisheartland.org  
June 2022

Frank Bandre



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June 2021

Gary Denué



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June 2020

Tina Hubert



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June 2021

Janet Jenkins



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June 2021

Gary Jones



618-841-9533

gjones@board.illinoisheartland.org  
June 2019





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*"IHLS and its community provide instrumental support to librarians like me who run small libraries"*

Stacey Carter, Lincoln Correctional Center

Robert Paarlberg



312-884-9022

[rpaarlberg@board.illinoisheartland.org](mailto:rpaarlberg@board.illinoisheartland.org)

June 2019

Susan Pennington



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June 2020

Mary Smith



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June 2020

Charlene Topel



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June 2021

Melanie Weigel



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June 2021

Sharon Yearwood



618-237-7648

[syearwood@board.illinoisheartland.org](mailto:syearwood@board.illinoisheartland.org)

June 2019



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### 3.3.2b Assessment that the Board meets Policy requirements in 23 ILAC 3030.255

The Board of Directors of the Illinois Heartland Library System does have policies in place to meet compliance regulations with 23 ILAC 3030.255.

Policies and Bylaws:  
<http://www.illinoisheartland.org/?q=about/policies>

Contracts and Purchasing:  
<http://www.illinoisheartland.org/sites/default/files/FinProcPolicy.pdf>

Personnel Code (Conflict of Interest, Travel Expenditures and Secondary Employment):[http://www.illinoisheartland.org/sites/default/files/IHLS%](http://www.illinoisheartland.org/sites/default/files/IHLS%20Personnel%20Code.pdf)

### 3.3.2c Assessment that the Board meets the Finances and records responsibilities in 23 ILAC 3030.260

The Illinois Heartland Library System Board of Directors policies and procedures to meet finances and records responsibilities.

Financial records are maintained at the Administrative Headquarters in Edwardsville.

A monthly financial report is prepared and reviewed by the finance committee and the full board.

An annual audit is conducted.

Funds are accounted for as of June 30th of each year by expenditure, encumbrance, or reserves.

An annual budget has been prepared and submitted prior to July 1.

A purchase inventory is maintained.

Accounts are organized on the basis of funds.

Financial reports are submitted to the Illinois State Library twice a year.

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### 3.3.3 System Ethics officer

*"My work life has always been connected with the printed word. I acquired a Library Science degree in the 1980s and worked in many of the libraries at the U of I. I have been a member of the Urbana Free Library board for several years."* Geoff Bant

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### 3.3.4 System FOIA Officer

*"I have been involved in advocacy for libraries both as an academic librarian and a trustee of both a public library and a library system."* Gary Denué

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### 3.3.5 Copy of Latest Approved Board Bylaws

Attachment 3.3.5

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## 3.4.1 Summary Appraisal of System Real Estate

Property Description	Own or Rent?	Value of Property	Plans for Property
Carbondale Hub 1740 Innovation Drive Carbondale, IL	Rent	\$2083.34 a month (\$25,000.08 yearly)	None
Champaign Hub 1704 Interstate Drive Champaign, IL	Own	Appraised value \$850,000 as of 2018	ADA remodel of bathrooms
Edwardsville Hub 6725 Goshen Road Edwardsville, IL	Own	Appraised value \$2,100,000 as of April, 2019	Mine subsidence repair Increase delivery footprint



Improvements made to the Champaign location include an epoxy coating on concrete floors, new carpeting, kitchen appliances and fresh paint.

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## 3.4.2 Inventory of Current Owned Motor Vehicles

Type (Model/Year)	License Plate Number	Current Mileage	Type of Use	Will vehicle be replaced during FY2020?
2016 Ford Transit 350 HR	U32518	183,599	Delivery	Yes
2019 Ford Transit 350	U33056	32,291	Delivery	No
2019 Ford Transit 350	U33021	26,729	Delivery	No
2019 Ford Transit 350	U33022	24,643	Delivery	No
2019 Ford Transit 350	U33023	33,226	Delivery	No
2019 Ford Transit 350	U33167	28,644	Delivery	No
2015 Ford F350	U30209	137,032	Delivery	No
2017 Ford Transit 150	U30759	150,503	Delivery	No
2018 Ford Transit 350	U32276	75,583	Delivery	No
2017 Ford Transit 150	U30799	132,228	Delivery	No
2018 Ford Transit 350	U32274	39,044	Delivery	No
2017 Ford Transit 150	U30758	135,694	Delivery	No
2015 Chevy Express 2500	U29922	163,498	Delivery	Yes
2016 Ford Transit 150	U30470	139,723	Delivery	No
2015 Chevy Express 2500	U29923	139,233	Delivery	No
2013 Ford E250	U29062	216,435	Delivery	Yes
2017 Ford Transit 150	U30839	105,844	Delivery	No
2017 Ford Transit 150	U30840	124,670	Delivery	No
2017 Ford Transit 150	U30841	79,689	Delivery	No
2018 Ford F450	U31660	112,321	Delivery	No
2018 Ford Transit 350	U32277	89,637	Delivery	No
2018 Ford Transit 350	U32517	54,361	Delivery	No
2019 Ford Transit 350	U3020	23,155	Delivery	No
2001 Dodge Caravan	U18195	135,581	Delivery	No
2015 Dodge Caravan	U30423	43,736	Staff	No
2015 Ford Taurus	U8313	70,17	Staff	No
2015 Ford Taurus	U30129	17,381	Staff	No
2015 Ford Taurus	U18520	65,924	Staff	No
2008 Dodge Caravan SE	U25399	138,500	Staff	No



### 3.4.3 Summary of Fiscal Year Out of State Travel



Number of Travelers	Actual Expense	Reason for Travel Destination & Duration
4	\$6,990.32	American Library Association Conference, Washington, DC – 6 days
5	\$11,247.78	Innovative Users Group Conference, Phoenix, AZ – 5 days
1	\$1,758.43	American Library Association Midwinter Conference, Seattle, WA – 5 days





**Illinois Heartland Library System**  
[www.illinoisheartland.org](http://www.illinoisheartland.org)