

# DIRECTOR & STAFF ACTIVITIES REPORT

OCTOBER 2023



**Illinois Heartland Library System**

IMAGINING TOMORROW - DELIVERING POSSIBILITIES TODAY



## ADMINISTRATIVE REPORT & STAFF ACTIVITIES

Submitted by Leslie Bednar, Executive Director

**Report Month:**  
October 2023

Marketing & Communications highlights submitted by Dr. Carol Hogan-Downey, Communications & Advocacy Administrator; Shandi Greve Penrod, Marketing Administrator

### MARKETING & COMMUNICATIONS ACTIVITY & ACCOMPLISHMENT HIGHLIGHTS

Strat. Plan Goal	Op. Plan Goal	Activity	Purpose & Progress/Results
Lead / Innov, Stwd / Sustn	Com1, 2, 3, 4, 5	Triennial member survey: Creation, testing, distribution, and promotion.	Survey redrafted to align with best practices and produce the most useful data possible. It closed at midnight Nov. 3; 409 people responded.
Mem Engmt / Netwk	Com1	Event marketing: Promoted IHLS and its services through the ILA and AISLE conferences and the Annual Library Crawl.	Highlighted iLEAD, Aspen, CMC, and the triennial survey at our ILA and AISLE booths. Recruited the iLEAD inaugural class. The Library Crawl concluded on Oct. 31.
Advocacy	Com4	Advocacy work: Copyediting the CARLI/IHLS/RAILS open letter to Illinois Broadband Lab, research and networking on potential library-school funding options for rural Ill. librarians, and updates to the HB2789/PA100-0103 info page.	The letter is on a joint website that was launched at ILA. We've started discussions with staff from the Illinois SOS office about school funding solutions. The updated PA100-0103 page received a shout-out from the State Library during a session at ILAAC23.
Consult / CE, Mem Engmt / Netwk	Com2	Member Day preparation: Updates to the 2024 logo, merch preparation, and meetings with vendors for early-bird registration incentives.	The logo received updates to enhance its overall appearance. Merch is now available in the store. We found an exciting, more cost-efficient option for registration incentives.
Advocacy	Com3, 4	The IHLS Store: Added new designs (one supporting public libraries and another celebrating HB2789/PA100-0103) and made updates on Redbubble to match the designs available on Spreadshirt.	New designs are in the store, which has already raised over \$200 for a member-library marketing microgrant. While we direct members to Spreadshirt (due to inclusive sizing), Redbubble's marketplace continues to bring in passive income and global brand exposure.
Mem Engmt / Netwk, Advoc	Com3	Regular communications: web articles, newsletter/emails, social media, etc.	Communicated effectively and efficiently with members through established communications. The November "Upcoming Events" email, sent Oct.30, already had a 23.5% open rate (OR) as of 1 p.m. Nov. 3. Unlike many of our other emails, the OR of the email series seems to

**OP PLAN GOALS KEY:** **Com1:** Communicate effectively & efficiently with IHLS stakeholders; **Com2:** Provide information and assistance to member libraries of all types through consulting and CE; **Com3:** Advocate for IHLS; **Com4:** Advocate for member libraries; **Com5:** Facilitate effective internal communication to enable better member service.

			continue increasing throughout the month, suggesting this OR will, as well.
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## HUMAN RESOURCES STAFF ACTIVITIES

Submitted by Jill Trevino

**Report Month:**  
 October 2023

Prepared by Submitter

### Department Activity & Accomplishment Highlights

Strat. Plan Goal(s)	Op. Plan Goal(s)	Activity	Description of Purpose & Progress/Results
<b>Lead / Innov</b>	Ensure that IHLS is sufficiently staffed to accomplish statutory priorities established by the Illinois State Library	Working with the delivery and facilities director to recruit and hire an operations manager. Recruited sorter in Champaign hub and driver in Edwardsville hub location.	Filled the vacancies for sorter and driver and currently recruiting for the operations manager in Champaign.
<b>Lead / Innov</b>	Strengthen member libraries' general human resources knowledge	Attended Job fairs on October 19 in Nashville and November 3 in East St Louis. Created a bookmark with a QR code to direct attendees directly to our job board on the IHLS website	Enable both IHLS and member libraries to recruit diverse top talent.
<b>Lead/Innov</b>	Support and develop IHLS staff	In partnership with the finance director, we obtained quotes for a new benefits plan for 2024. HR sent out a survey to staff to ensure that we were meeting staff needs and leading the initiative throughout the process.	The benefits proposal will be reviewed by the board of directors at the November 8 board meeting for final approval.
<b>Lead / Innov</b>	Support and develop IHLS staff	Reviewed employee handbook, updating policies, adding recently signed laws, adding new policies, and revising existing policies.	Worked with the Leadership Team and our employment law attorney in making the Employee Handbook a tool for organizational effectiveness.
<b>Consult / CE</b>	Strengthen member libraries' general human resources knowledge	Sexual Harassment Prevention Training is free to our member libraries using the same system IHLS employees use to meet the state Sexual Harassment Prevention Training compliance.	We have enrolled 71 libraries and 315 library staff, directors, and trustees since the inception of the training.

**OP PLAN GOALS KEY:** **HR1:** Retain and attract highly qualified IHLS staff whose focus will be to accomplish IHLS goals and objectives, seek continuous professional growth, and maintain a positive team dynamic; **HR2:** Explore opportunities to enhance human resources knowledge among member libraries.

## *IHLS Employee Handbook and Job Fair for October 2023*



### **EMPLOYEE HANDBOOK**

Employee Handbook 2024



Job Fair Booth – for recruiting IHLS and member library opened positions





## IT STAFF ACTIVITIES

Submitted by Troy Brown

**Report Month:**  
Oct 2023

Prepared by submitter.

## Department Activity & Accomplishment Highlights

Strat. Plan Goal(s)	Op. Plan Goal(s)	Activity	Description of Purpose & Progress/Results
Lead / Innov	IT	Driver iPad App updates	Updated driver iPad app with the ability to track hub-to-hub deliveries.
SHARE Upgrades	IT	L2 integration for cataloging training	L2 is being used to track cataloging data for continuing education. Custom code and a website were created to allow the SHARE Bibliographic Services Manager to track cataloging hours, and results are exported to Excel in the format requested.
SHARE Upgrades	IT	SHARE servers are installed and being configured for production	Three IT team members were onsite for three days installing and moving servers.
HR Payroll	IT	Paylocity deployment	Paylocity setup and configuration for SSO (Single sign-on)



## FINANCE STAFF ACTIVITIES

Submitted by Rhonda Johnisee

**Report Month:**  
October 2023

Prepared by submitter.

## Department Activity & Accomplishment Highlights

Strat. Plan Goal(s)	Op. Plan Goal(s)	Activity	Description of Purpose & Progress/Results
Stwd / Sustn	Acc1	Completed quarterly grant reports and submitted the OCLC Billing grant report to the Illinois State Library.	The quarterly grant reports are a requirement from the Illinois State Library for the special revenue grants. They are to be completed within 15 days after the fiscal quarter ends.
Stwd / Sustn	Acc1	Analyzed benefit insurance rates in comparison to FY2024.	We ensure that the recommendation for the insurance plans fits within the FY2024 budget along with satisfying the needs of the employees.
Stwd / Sustn	Acc1	Produce interim financial reports that compare actual versus budget revenue and expenditures, balance sheets, and cash flow.	The financial reports are provided for the IHLS Finance Committee and Board for their approval each month.
Stwd / Sustn	Acc1	We created the monthly and quarterly accounts receivable invoices. We continued to receive multiple cash receipts throughout the month due to the large July annual invoicing.	The incoming cash flow from the annual billings is vital to the SHARE Fund and OCLC billing to help cover the new fiscal year expenditures.
Stwd / Sustn	Acc1	Bi-weekly payrolls were processed, and payroll tax deposits were made. Accounts payable invoices were paid by due dates.	We ensure that IHLS stays compliant by following payroll laws and ensuring that tax deposits are made on time. Late fees and interest charges are avoided by finance staff closely monitoring and processing accounts payable invoices and credit card transactions.
Stwd / Sustn	Acc1	Organizational supplies were purchased as needed.	Necessary supplies were purchased as needed and requested.

**OP PLAN GOALS KEY:** **Acc1:** Equip IHLS Administration and Board of Directors with effective reporting of financial transactions to encourage good stewardship through decision-making; **Acc2:** Provide member libraries with tools to enhance their financial literacy to encourage good stewardship of public funds.

	Items Count	Total Value
Accounts Receivable Cash Receipts	239	\$460,709.65
Accounts Receivable Invoices Generated	276	\$321,805.74
Accounts Payable Invoices Received	101	\$219,383.34
Accounts Payable Payments Disbursed	84	\$302,453.10

October Statistics for Accounting Transactions





## BIBLIOGRAPHIC SERVICES STAFF ACTIVITIES

Submitted by Jennifer Baugh and Dr. Pamela Thomas

**Report Month:**  
October 2023

Prepared by Submitters

## Department Activity & Accomplishment Highlights

Strat. Plan Goal(s)	Op. Plan Goal(s)	Activity	Description of Purpose & Progress/Results
ResShar	CSSH	Provided high-quality cataloging services to SHARE member libraries through copy and original cataloging.	Cataloged 567 items and imported 330 \$3 Bibs for SHARE member libraries.
ResShar	CSSH	Increased the usability of the SHARE database to ultimately increase resource sharing.	Continued preparing clean-up spreadsheets for school libraries in preparation for Aspen implementation.
Consult / CE	CTSH	Provided continuing education opportunities for our member libraries related to barcoding and cataloging.	Hosted SHARE Your Cataloging Questions with a total of nine attendees. Provided barcoding training via Zoom with seven attendees. Jennifer Baugh and Anna Weigand also presented a program entitled "Not Your Father's Audiobooks" at the ILA Conference with 25 attendees.
Consult / CE	CTSH	Provided one-on-one cataloging review and training to catalogers-in-training at 13 member libraries.	Reviewed and imported 35 files containing 423 bib records.
ResShar	CMC1	Cataloged 267 items (including 144 originally cataloged and 123 records enhanced) and created seven name, and four series authority records. The PrairieCat database cleanup project continues, where 139 bibliographic records were created, enhanced, or merged. The Alma cleanup project for the Consortia of Academic and Research Libraries in Illinois (CARLI) continues,	Through cataloging new items and providing database cleanup, the CMC staff improves user access to bibliographic records.

**OP PLAN GOALS KEY:** **CSSH:** Provide cataloging services for SHARE member libraries, including transitional libraries, and increase the usability of the SHARE database to ultimately increase resource sharing; **CTSH:** Maintain rigorous cataloging standards that include continuing education in bibliographic services and cataloging for member libraries. Support member skills necessary for fluency in national, state, and local policies such as RDA, OCLC, and Library of Congress; **CMC1:** Provide cataloging and bibliographic services for libraries in the RAILS and IHLS service areas to increase access and encourage resource sharing of information resources found in Illinois libraries; **CMC2:** Support access to Illinois digital collections by providing information on the formation and content of metadata; **CMC3:** Instruct Illinois library staff in the use of resource description, including cataloging and metadata.

**BIBLIOGRAPHIC SERVICES REPORT & STAFF ACTIVITIES**

		<p>where 655 bibliographic records were deduped (merged), 18 deleted, and 446 edited for a total of 1,119.</p> <p>The new RSA Backlog Cleanup Project began with 111 records originally cataloged or enhanced, including 14 braille books.</p> <p>World language bibliographic records were in Arabic, Spanish, Polish, and Vietnamese.</p> <p>1 record was merged in OCLC Connexion for OCLC.</p>	
ResShar	CMC2	Transcribed four manuscripts, created 21 typed documents, and created and uploaded 1 compound object and one simple object to CONTENTdm.	Continued progress on adding new documents and collections to the Illinois Digital Archives (IDA) website, making these collections globally available and searchable.
Consult / CE	CMC3	<p>Presented October's Online with the CMC: Stump the CMC.</p> <p>Pam &amp; and Eric presented a poster session at the AISLE (Association of Illinois School Library Educators) Conference.</p> <p>Six CMC staff attended the ILA Annual Conference, staffed the CMC booth, and attended sessions.</p> <p>Pam &amp; and Eric co-presented at the ILA Annual Conference, The CMC Cultivates and Connects Collections for Consortia Through Collaboration.</p> <p>Pam co-presented Growing with Cataloging Training with Nincy George (RAILS, Reaching Across Illinois Library Systems), and Joy Anhalt, Tinley Park Public Library.</p> <p>Serials Cataloging, a two-week course, began on Oct. 30.</p>	<p>31 registered in L2; 21 live participants; IHLS, 10; SHARE, 6; RAILS, 5. The CMC continues providing continuing education. For those who can't attend the live webinar, a recording is made available for registrants to view later.</p> <p>Three people stopped by the poster session and were informed of the CMC's free cataloging services.</p> <p>Several hundred people stopped by the CMC booth.</p> <p>17 people attended Pam &amp; Eric's presentation.</p> <p>26 people attended Growing with Cataloging Training.</p> <p>60 students are registered for Serials Cataloging!</p>



## DELIVERY & FACILITIES STAFF ACTIVITIES

Submitted by Colleen Dettenmeier

**Report Month:**  
October 2023

Prepared by submitter

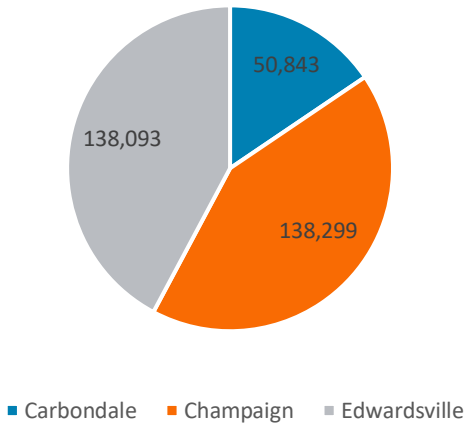
## Department Activity & Accomplishment Highlights

Strat. Plan Goal(s)	Op. Plan Goal(s)	Activity	Description of Purpose & Progress/Results
Stwd / Sustn	Fac	Facilities Maintenance	IHLS facilities were maintained to ensure safe environments for staff and visitors.
ResShar	DS1	Providing Delivery	<p>IHLS staff provided contactless delivery of 327,235 items to all IHLS members. The same-day, same-route Delivery On the Go service (DOGs) was provided for over 4,589 items.</p> <p>IHLS staff began working with the Automated Materials Handling System (AMHS) consultant to write the Request for Proposal (RFP).</p>
Stwd / Sustn	DS2	Networking Groups	IHLS Delivery & Facilities Director attended the Illinois Library Association Annual Conference.
Stwd / Sustn	DS1	Vehicle Surplus	IHLS Operations staff prepared information for the surplus box truck with a lower price for auction because we received no bids on the first auction.

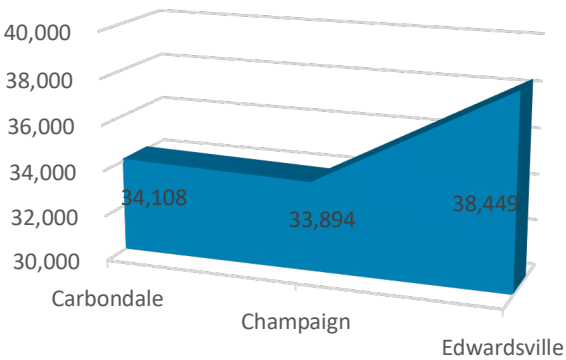
# Delivery Statistics

## October 2023

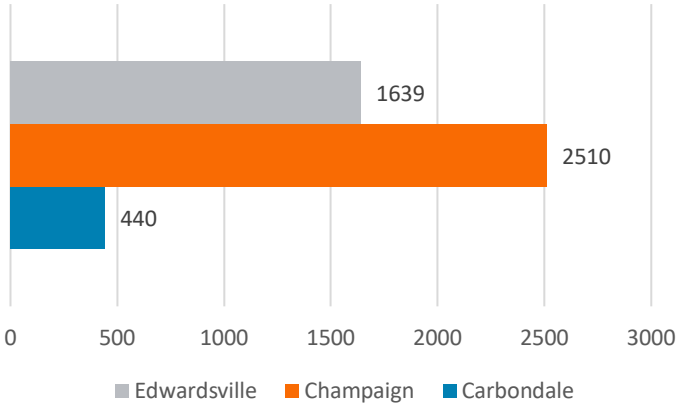
Total Items Delivered



Total Miles Driven



Total Delivery on the Go Service Items Delivered





## SHARE STAFF ACTIVITIES

Submitted by Cassandra Thompson

**Report Month:**  
 October 2023

Prepared by Submitter

## Department Activity & Accomplishment Highlights

Strat. Plan Goal(s)	Op. Plan Goal(s)	Activity	Description of Purpose & Progress/Results
ResShar	DevSH	Sponsored the 2023 AISLE Conference in Champaign, Ill.	Presented to school librarians around the state about SHARE and the new Try SHARE program.
ResShar	DevSH	Prepared for Polaris downtime by reviewing procedures.	The SHARE and IT teams were prepared for both planned and unplanned downtime in October.
ResShar	RsSH	Continued to work with Bywater Solutions to implement Aspen Discovery.	Prepared communications to members and started configuration and data mapping for the catalog.
ResShar	DevSH	SHARE Circulation & Resource Sharing Committee had a planned meeting but did not achieve a quorum.	With several visitors, the SHARE team continued to provide updates and communicate with members.
ResShar	RsSH	SHARE staff attended an annual meeting virtually.	It was an opportunity to learn more about Pipedrive CRM and the new project planning process.
ResShar	DevSH	Sponsored the Illinois Library Association 2023 Annual Conference in Springfield, Ill.	SHARE team members had an opportunity to present Aspen to member library staff, celebrate the 10 <sup>th</sup> anniversary of eRead Illinois, and promote SHARE to potential members.
ResShar	ERes	Circulated 29,521 owned items and 1,508 pay-per-use items.	The cloudLibrary collection now has 54,948 owned items and 119,798 pay-per-use items, for a total collection of 174,782 items.

**OP PLAN GOALS KEY:** **RsSH:** Provide an innovative resource discovery, sharing, and automation group; **DevSH:** Increase SHARE membership numbers; **ILL:** Increase familiarity and compliance with the ILLINET Interlibrary Loan Code (ILL Code); **Eres:** Increase e-resource use through increased vendor opportunities, comprehensive library staff training, and marketing support to members.



# Illinois Heartland Library System

IMAGINING TOMORROW - DELIVERING POSSIBILITIES TODAY

## MEMBER SERVICES & GRANTS ACTIVITIES

Submitted by Ellen Popit

**Report Month:**  
Oct 2023

Prepared by Submitter

## Department Activity & Accomplishment Highlights

Strat. Plan Goal(s)	Op. Plan Goal(s)	Activity	Description of Purpose & Progress/Results
Consult / CE	MS2	The iLEAD Trustee Training Portal was debuted twice this month. It was the focus of the Oct. 19 Third Thursday event at the Centralia Regional Library District and of a presentation on Oct. 26 at the Illinois Library Association's Annual Conference.	These presentations were long-awaited demonstrations of the work done over the last year by Anna Yackle and Leanne Furby. It was most evident that there is much statewide enthusiasm about this project.
Consult / CE	MS2	Our school library membership coordinator offered presentations at the conferences for both school and public library workers in addition to individual school districts' In-Service Day.	This activity is a strong indication of the progress IHLS is making with the school library community, which has been a long-term goal.
Mem Engmt / Netwk	Net1	Department staff were able to participate in the statewide conferences for school and library workers as well as the conference sponsored by the American Association of School Libraries.	In a post-COVID environment, the opportunity to network with colleagues on a broad level cannot be undervalued. The connections made and strengthened contribute significantly to our ability to work as effective professionals.
Mem Engmt / Netwk	Net1	Department staff visited 20 public libraries during the annual Library Crawl.	The effort of going to our member libraries is always appreciated. Being in the field strengthens staff's knowledge of the breadth of the system and views libraries in the context of their individual communities.
Lead / Innov	Net2	Staff participated in the work of the ILA Nominating Committee and the ILA 2024 Conference Planning Committee.	Being at the table for statewide committee work means there is a voice for libraries in central and southern Illinois.

**OP PLAN GOALS KEY:** **MS1:** Review membership of all system agencies on an annual basis; **MS2:** Support member libraries in their efforts to provide excellent library service to their stakeholders; **Net1:** Continue to develop relationships with and among members; **Net2:** Continue active partnerships in statewide and national initiatives that support enhanced library service; **Net3:** Work with library entities that improve member services; **CE:** Increase continuing education opportunities as allowed by Illinois State Library (ISL) directive; **GRT:** Consistent communication of available grants.