In preparation for our first committee meeting, I pulled together various resources that will give members a view of strategic planning work since June 2011. Please find attached documents related to the three long-range planning efforts in our organization’s history. The documents and brief history are below.

- **2011 Strategic Plan**
  Developed by the Transition Board in 2011, this was effective July 1, 2011.
- **Long-Range Plan of Service and Commitment to Members**
  Approved by Board of Directors October 27, 2015.
- **Strategic Plan Survey Analysis**
  Analysis of a membership survey focused on the first three components of the 2015 Plan, and discussed with the board at their March 26, 2019 meeting.

Please let me know if you have any questions. I look forward to our initial committee meeting.
MISSION
Illinois Heartland Library System is a community of multitype libraries developing partnerships and sharing resources in pursuit of excellent service.

VISION
We envision a future where all libraries & information partners collaborate to provide accessible & innovative services.

VALUES
We value--
- Open access and sharing of resources.
- Cooperation, collaboration and contribution among members & information partners.
- Quality customer services
- Honest and open communications among stakeholders.
- Respect and integrity in all interactions.
- The diversity of our members and their communities.
- Fiscal stability and accountability.
- The protection of Intellectual Freedom and Privacy.
- Innovation and creativity.

OPERATIONAL ASSUMPTIONS
The overall priority for services and programs will be the resource sharing to include LLSAPS, interlibrary loan, reciprocal borrowing, delivery, and talking books.
GOALS AND OBJECTIVES

Priority: Resource Sharing

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

Objective A: Encourage resource sharing.

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

Objective C: Ensure the integrity of records.

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

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

Objective A: Ensure that IHLS delivery of library materials is accurate and timely.

Objective B: Leverage existing delivery resources.

Objective C: Identify best practices and opportunities to develop shared visions and practices with other Illinois library systems and library materials delivery service providers.

Priority: Talking Book Program

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

Objective A: Support the statewide machine lending program located in Carterville.

Priority: Provide timely and pertinent information to member libraries.

Goal I: Communications among member libraries and partners.

Objective A: Provide various mechanisms to ensure good communications among member libraries and partners.
Priority: Administrative Activities

Goal I: Ensure effective utilization of IHLS resources

Objective A: Ensure fiscal accountability.

Objective B: Employ qualified, professional, accountable staff.

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.

Objective B: Provide a web-based training and information tool for all library staff, volunteers, and students through Illinois
VISION
Illinois Heartland Library System (IHLS) empowers libraries to embrace innovation and collaboration.

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.

VALUES
- IHLS staff and board commit to the following values in the management and operation of IHLS:
  - Innovation and leadership
    - We are innovative and creative and exercise leadership in developing programs and services that meet the needs of IHLS diverse multi-type libraries.
  - Engagement
    - We engage members and draw on their expertise in the development and improvement of programs and services.
  - Integrity and Respect
    - We operate IHLS ethically with accountability and transparency.
    - Our diverse staff works together with trust and respect for our individual talents in order to provide the best service possible.
  - Collaboration
    - We value collaboration among members with other library organizations and community partners.
  - Communication
    - We practice clear and open communication with members, staff and other stakeholders.
GOALS:

GOAL 1: Resource Sharing
- IHLS facilitates, supports and promotes resource sharing to assist member libraries of all types to be of service to their users.

Goal 2: Member Engagement and Networking
- IHLS communicates with and engages member libraries of all types and promotes member networking to assist libraries in improving their services.

Goal 3: Consulting and CE
- IHLS provides information and assistance to member libraries of all types through consulting and continuing education to improve the expertise of their staff.

Goal 4: Leadership and Innovation
- IHLS provides leadership and embraces innovation to assist member libraries of all types to better serve their users.

Goal 5: Advocacy
- IHLS advocates for the role of libraries and library staff to build strong libraries and strong communities.

Goal 6: Stewardship Sustainability
- IHLS stewards its resources to ensure maximum benefit to member libraries of all types and to taxpayers.
The implementation of the IHLS Strategic Plan, that was adopted by the board of directors in October 2015, was put on hold during the two years of the Illinois budget impasse due to financial concerns. With the adoption of a statewide budget, IHLS staff moved ahead with focus groups held in the spring of 2018 to solicit input from membership regarding how to best implement the six adopted goals. To reach an even broader group of members, a survey was recently developed and sent out to our members. This survey focused on only the first three goals, since those are the ones that touch membership most directly.

152 Libraries Responded:

Respondents by library type is a helpful evaluation of the communication tools utilized to promote this assessment. Of our 521 member libraries in IHLS, school libraries are the largest group by type (45%). Regarding our second largest group of members by type, IHLS has clearly identified communication channels that reach a majority of our public library members (43%). In future surveys, we will insure a more targeted approach to soliciting school library respondents. Academic and special library replies to the survey are fairly consistent as they each make up approximately 6% of our total membership.
RESOURCE SHARING

PERCEIVED VALUE OF SERVICES PROVIDED
(5 is highest)

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Perceived Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery of materials throughout the system and the state</td>
<td>4.75</td>
</tr>
<tr>
<td>E-resources made available to Illinois Heartland Member Libraries</td>
<td>4.14</td>
</tr>
<tr>
<td>SHARE, the IHLS automation consortium that supports resource sharing among member libraries</td>
<td>4.53</td>
</tr>
<tr>
<td>Vendor discounts made available through IHLS membership</td>
<td>3.87</td>
</tr>
<tr>
<td>Grants that are posted on the IHLS Website</td>
<td>4.12</td>
</tr>
</tbody>
</table>

Highlights:
- Fantastic job for our membership.
- Everyone and the process is great and doing a great job.
- Our most used and best loved service is delivery, and we are very happy with that.

Suggested Improvements:
- Consistent Policy Compliance
- Consistent Lending Periods
- Expanded Digital Resources
- Cost

Resource Sharing and Delivery are Core Services mandated by the Illinois State Library. As an agency, IHLS is firmly committed to ongoing improvement and expansion of these services in order to provide excellent services to patrons in central and southern Illinois.

MEMBER ENGAGEMENT AND NETWORKING

PERCEIVED VALUE OF NETWORKING OPPORTUNITIES AND COMMUNICATIONS
(5 is highest)

<table>
<thead>
<tr>
<th>Networking Opportunity</th>
<th>Perceived Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>IHLS email lists</td>
<td>4.4</td>
</tr>
<tr>
<td>IHLS Member Connection, the system’s online newsletter</td>
<td>4.2</td>
</tr>
<tr>
<td>IHLS presence on Social Media, particularly Facebook and Twitter</td>
<td>3.44</td>
</tr>
<tr>
<td>Members Matter Meetings held throughout the year at diverse system locations</td>
<td>3.81</td>
</tr>
<tr>
<td>Networking events hosted by the IHLS Board of Directors</td>
<td>3.57</td>
</tr>
<tr>
<td>Regional Networking meetings coordinated by member libraries</td>
<td>3.86</td>
</tr>
<tr>
<td>Tools such as Zoom and video conference that allow for remote participation</td>
<td>4.34</td>
</tr>
</tbody>
</table>

Highlights:
- Use of Zoom for remote participation
- Learn of online meetings through Social Media, online meetings are a good alternative
- Learned so much through the e-mail lists

Suggestions for Improvement:
- A clear mandate to keep experimenting with locations and times for networking opportunities
- More recorded and online opportunities
- Expanded trustee training
- Substantive speakers
In a world that bombards us with information, IHLS strives to efficiently provide our membership with timely and accurate communication. Continuously exploring effective tools for delivering that information to all members is an ongoing process. A priority of equal value is supporting networking opportunities in a wide array of arrangements that meet the needs of participants. Realizing the geographic parameters of the system, we also realize the benefits of in-person opportunities.

CONSULTING AND CONTINUING EDUCATION

PERCEIVED VALUE OF CONTINUING EDUCATION OPPORTUNITIES
(5 is highest)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Day</td>
<td>4.4</td>
</tr>
<tr>
<td>Promotion of events such as statewide and national conferences</td>
<td>4.2</td>
</tr>
<tr>
<td>Cataloging Training</td>
<td>3.34</td>
</tr>
<tr>
<td>SHARE Training</td>
<td>3.81</td>
</tr>
</tbody>
</table>

**Highlights:**
- I like how you can ask about anything and get an answer and if you ask for individualized instruction they make every effort to try to come to you or set up a training near you so everyone needing can attend.
- Cataloging training is very robust.
- Keep the online training opportunities coming. I love them!

**Suggestions for Improvement:**
- More for school librarians with professional development credit
- Set up a mentoring program
- More training in all areas

As IHLS completes its eighth year of existence, consulting and continuing education are still developing programs. With an expanded Membership Services department, we are currently able to provide consulting services in areas having to do with Administrative Code compliance and look forward to expanded board training opportunities. Continuing education opportunities related to SHARE participation are well established and evaluated by SHARE staff on a regular basis. IHLS staff will continue to explore opportunities for professional development in other areas of our field.

CONSULTING PRIORITIES FOR LIBRARIES AND STAFF

- Legal Compliance
- Grant Writing
- ADA compliance
- IMRF
- Current Library Issues
- IPLAR
- Budgeting
- HR
- Board Training
The priorities mentioned above reflect the breadth of topics of interest to our membership.

**NEXT STEPS**

Data and comments from this report will be further studied by our administrative team and staff as we move ahead with the creation and implementation of an Operational Plan for FY2020.