



**Illinois Heartland Library System**



# **September 2019**

## **Director & Staff Activity Report**



# Administrative Report

---

## **COMMUNICATIONS GOALS**

*Submitted by Julia Pernicka, Communications Coordinator and Shandi Greve Penrod, Marketing Coordinator*

**Communicate effectively and efficiently with IHLS stakeholders. Advocate for the organization and our members.**

- Attended Social Media Marketing Bootcamp. The 3-day intensive bootcamp covered social media networks, social analysis, creating content, informational graphics, identifying metrics, and scheduling software.
- Developed and promoted a toolkit around the recent embargoes and restrictions placed on library e-resource purchases by MacMillan and others.
- Promoted IHLS and SHARE information through email, social media, and/or website on various subjects: MacMillan Embargo, IHLS Annual Meeting, Member Day 2019, October Members Matter forum, September and October Directors' Chats, several discounts and demos, and the Sexual Harassment of Library Staff webinar (which was discounted for IHLS-member libraries).
- Hosted Directors Chat on September 4, which facilitated engagement between library directors and shared IHLS news and opportunities.
- Developed a CMC rack card intended to (1) demonstrate the proven value of the CMC by highlighting its past work, and (2) illustrate the types of items the CMC can catalog.

## **BOARD SUPPORT GOALS**

*Submitted by Stacie Bushong, Executive Assistant*

**Provide support for IHLS board members. Retain and purge materials on an approved schedule.**

- Gathered all documents and components for the FY2019 Annual report and created the final graphic document that was submitted to the Illinois State Library on time.
- Coordinate the 2019 Annual meeting event.
- Continue to coordinate 2019 Member Day to provide an educational event for our members in addition to offering the opportunity to network and have fun.



# Human Resources Report

*Submitted by Dominique Granger, Human Resources Generalist*

A selection was made this month for the IT position. Face to face interviews were conducted in the first half of the month. The successful candidate is forecasted to start in October. Open enrollment for medical benefits started this month as well. Employees utilized a new software to enroll in their benefits. This Employee Web Portal now gives employees and managers access to information electronically. They are able to check leave balances and make changes to their personal information right from the portal.

We are very excited to implement this electronic system for employees. This portal has many different possibilities, and the department is looking forward to learning more ways that the portal can be used to create more efficient processes.

Live workshop or online training	Format	# of staff
Understanding Financial Statements	Live	3
Advanced Microsoft Excel Marcos, PivotTables, Charts and More	Live	2
Managing Multiple Priorities, Projects, and Deadlines	Live	2
10 steps to Successful Project Management	Online	1
Assertive Communication	Online	1
Business Attire Basics for Women: Business Casual Attire	Online	1
EQ Toolbox: How to be More Self-Aware	Online	1
Records Retention Guidelines for Financial Institutions	Online	1
The Art of Non Verbal Communication	Online	1
Social Media Marketing Bootcamp	Live	1



# Accounting Report

---

*Submitted by Rhonda Johnisee, Finance Director*

The IHLS annual audit report was completed by Scheffel Boyle in September. Their representatives gave an overview to the Finance Committee and then it was presented in person by Steve Pembroke and Josh Andres at the Board meeting. The Auditor's report reflected an unmodified/clean opinion, which is the best type of opinion that can be given. An unmodified opinion means that the financial statements are presented fairly in all material respects.

In addition to the finalization of the audit, the Finance department contributed to the preparation of the IHLS Annual Report. For this report, we compiled totals for the completion of several sections. The Delivery and SHARE sections were the most detailed and labor intensive. The completion of the Annual Report brings closure to FY2019 in our department.

In a few short weeks, the Finance and HR staff were trained on the new Benefits Enrollment module. This module is used for employees to make their benefit insurance elections online. The Finance department created and tested the codes for the setup of this module. We created instructions to access this new module through the Employee Web Services (EWS) site and assisted employees in creating their accounts and completing their enrollment. This module helped to streamline the open enrollment process and reduce the Finance staff's time on data entry. The EWS site also gives all staff access to their employee profiles, pay history, and benefit choices.

## ACCOUNTING GOAL:

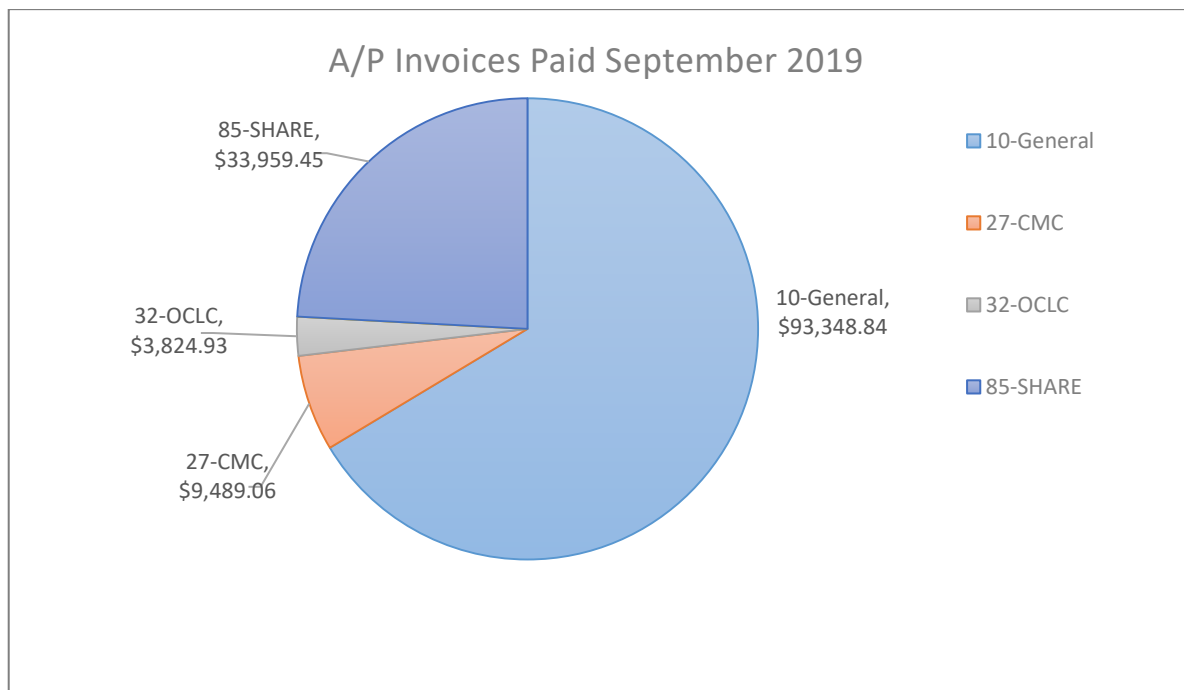
Equip IHLS Administration and Board of Directors with effective reporting of financial transactions to encourage good stewardship through decision making. Provide member libraries with tools to enhance their financial literacy to encourage good stewardship of public funds.

- Arranged travel for IHLS staff.
- Prepared and provided Management's Discussion and Analysis (MD&A) for annual audit.
- Attended website redesign meeting.
- Received training on the new Busey onsite deposit process.
- Attended in-person Member Day planning.
- Attended Microix timeclock setup training.
- Attended Enterprise Fleet Manager meeting.
- Attended meeting with Arthur Gallagher regarding assessment of Liability insurance.
- Attended Fred Pryor "Understanding Financial Statements" seminar.
- Reviewed and assisted in the calculation of proposed SHARE Member Fee increase.
- Attended the IHLS & SHARE Finance Committee and IHLS Board of Directors meetings.



# Accounting Report

- Prepared and processed two payrolls.
- Prepared August 2019 Bill Payments, Credit Card Transactions, Statement of Revenues and Expenditures, and Balance Sheets Reports for IHLS Finance Committee and Board of Directors.
- Generated and mailed 166 accounts receivable invoices (OCLC – 15 Monthly and 118 Transactional; SHARE – 2 Monthly and 6 Cloud eBooks Purchases; General - 1 ILDS Project and 24 Harassment Webinar).
- Received and posted 276 accounts receivable cash receipts checks totaling \$1,728,113.59 (OCLC – 202, SHARE – 56, and General – 18).
- Received and entered 95 accounts payable invoices.
- Disbursed 72 accounts payable checks totaling \$140,622.28.





# Grants Report

---

## **GRANTS REPORT & STAFF ACTIVITIES**

*Submitted by Ellen Popit, Associate Director*

The availability of grant funding is important to the Illinois Heartland Library System and all our members. We are fortunate to have a staff person dedicated to consistently scanning the grant landscape and using our website to increase awareness of those opportunities. In addition, the professional staff as a whole is alert to new grant offerings and how they may be useful to our membership.

### **ACCOUNTING GOAL:**

Consistent communication of available grants.

- The IHLS Grants Specialist reviews grant offerings on a consistent basis, with an eye toward grant opportunities that meet the needs of system members and also grants that would benefit Illinois Heartland Library System as an agency.
- Grants on the IHLS website are regularly evaluated for ongoing relevance.



# Information Technology Report

---

## **INFORMATION TECHNOLOGY REPORT & STAFF ACTIVITIES**

*Submitted by Troy Brown, IT Director*

I'm happy to report that the issues with the State Library and their ability to connect to Zoom using the state's video network are resolved. Many hours of troubleshooting went into finding a solution.

With the retirement of Joan Bauer from SHARE, the IT department has had to fill in the gaps especially for some of the ePay and data import jobs on Polaris. We also had the Decatur Public Library go fine free this month. This change requires over 4,000 records be manually changed in Polaris. However, with the help of the IT department, we wrote a script to accomplish this in a matter of milliseconds. This saved Kim Sparks many hours of clicking the mouse.

The Website redesign project is making a lot of progress. We are in the final stages of selecting a vendor to perform our IHLS website redesign. Interviews were just held with several IHLS staff involved and gave tremendous feedback.

Finally, with the board's approval, the new Web & IT Administrator will start work on October 30. This will give us greater depth in the IT department, as well as relieving some work from our other staff members. We have missed having this position filled and thank everyone for all the time it has taken to proceed.

### Goals:

Provide the IT support necessary for IHLS and SHARE to function efficiently. Implement new design to IHLS website.

- The website redesign project is nearing the critical point of vendor selection.
- The delivery "iPad Project" has completed its new interface for the operations team. New features are now being built and rolled out.



# Bibliographic Access

---

*Submitted by Shelley Stone, SHARE Manager for Bibliographic Services*

September always brings an increase in items sent for cataloging. Along with the usual supply of books, DVDs, and audio recordings, staff received card games, a flip chart, game controllers, kits, and a pocket chart with activity cards. The challenge of cataloging unique items keeps catalogers on their toes. They are continuously learning new formats and guidelines.

## CATALOGING SERVICE FOR SHARE GOALS:

Provide cataloging services for SHARE member libraries, including transitional libraries, and increase usability of the SHARE database to ultimately increase resource sharing.

- Cataloged 715 items for SHARE member libraries.
- Imported 294 \$3 bibs for SHARE member libraries.
- Created 22 on order bibs for SHARE member libraries.
- Cataloged 145 items for new member libraries joining SHARE.
- Merged 218 bibliographic records, cleaned up/corrected 2,624 bibliographic records, and cleaned up/corrected 11 item records.

## CATALOG TRAINING FOR SHARE MEMBERS GOALS:

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 (Resource Description and Access), OCLC and Library of Congress.

- SHARE bibliographic services staff taught 9 cataloging-related classes, including the Catalogers Training Session focusing on subject strings.
- Staff handled over 156 emails and contacts.
- Staff also reviewed and imported 33 files with a total of 128 bibliographic records for beginning catalogers.
- With the start of school and many new school librarians, we provided Barcoding 1 and 2, two required classes, in three different locations this month.

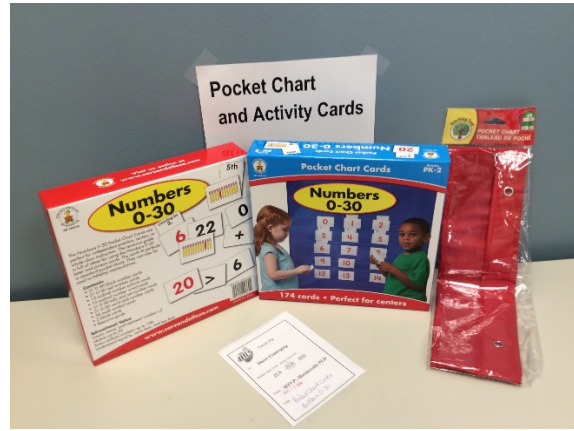
## CATALOGING MAINTENANCE CENTER (CMC) GOALS:

Provide cataloging and bibliographic services for libraries in Reaching Across Illinois Library System (RAILS) and IHLS to increase access and encourage resource sharing of information resources found in Illinois libraries. Support access to Illinois digital collections by providing information on the formation and content of metadata. Instruct Illinois library staff in the use of resource description, including cataloging and metadata.

- CMC staff cataloged 175 items for libraries in Illinois.
- CMC staff created 13 NACO name authority records for improved user access.
- Online with the CMC: To be a Series or Not to be was held as an online webinar with a short Q&A following.
- CMC staff continued working on an oral history project for Marshall Public Library.
- CMC staff gave two presentations at PUG Day in Rockford (PrairieCat Users Group).



- CMC staff gave a brief presentation at the Health Sciences Librarians of Illinois annual conference in Champaign.
- Staff attended the Local History and Genealogy Forum.
- Staff continued working on the cleanup project for the PrairieCat group of automated libraries in northcentral Illinois.



Cheri Schuler-Faust & Erin Rose  
Representing CMC at PUG Day



# Delivery Report

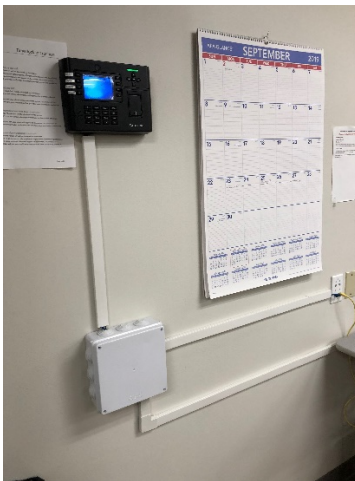
*Submitted by Susan Palmer, Operations Director*

September, a month to remember.

Meetings attended:

- IHLS Website meeting
- Illinois Library Association (ILA) Conference Committee
- Laboratory of Applied Spatial Analysis (LASA) conference call
- Member Day meeting
- Gallagher Insurance informational meeting of benefits
- Enterprise Fleet Management investigation
- Webinar from University of Illinois Extension office on Succession Planning
- Reaching Forward South (RFS) and ILA meeting

Delivery is always evaluating current practices to make sure that we are being as efficient as we can be. In this ongoing evaluation, we have decided to move some libraries to the Carbondale hub, creating a slightly lighter delivery volume for the Champaign and Edwardsville delivery hubs. Brant Wingerter recently changed some of the iPad reports. When we evaluated the new reports, we realized we could use our delivery fleet to their capacity. We have a target date of November 1, 2019 to make these changes. We will be reaching out to libraries that are affected with the hub/route changes.



Time clock finger scan



Champaign painted curb



Champaign sorting



# SHARE Report

---

## SHARE REPORT & STAFF ACTIVITIES

*Submitted by Cassandra Thompson, SHARE Director*

September was an excellent opportunity to review the successes of the past year as we prepared the annual report. It was also a time to reflect on our next steps as a department and organization.

### LLSAP (SHARE) GOAL:

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

- SHARE Finance & Policy Committee met on Thursday, September 12.
- Worked with the SHARE Finance & Policy Committee and the SHARE eResource Committee to discuss potential value-added services, like a mobile app.
- Discussed the need for an increase to the SHARE membership fees to continue to provide exceptional service, with the benefit of economies of scale and group purchasing power.
- Set up several discounted continuing education webinars for IHLS members, including Sexual Harassment of Library Staff (Library20.com).
- Provided information on Back-to-School Troubleshooting via our SHARE Member Notes.
- Began working with libraries to transition to JetPay in Polaris for fine collection.

### LLSAP DEVELOPMENT GOAL:

Increase members participating in SHARE.

- Sent a packet of information for a potential school membership.
- Welcomed a new member, Meridian CUSD 101!

### E-RESOURCES GOAL:

Increase familiarity with and utilization of eResources.

- SHARE eResource Committee met on Monday, September 23.
- Worked with RAILS to finalize a group purchase for SWANK movie licensing.
- Prepared several demos for IHLS members, including EduCode, Washington Post, and Baker & Taylor.
- Our Circulation and Resource Sharing Specialist, Lesley Zavediuk, along with Marketing's Shandi Greve Penrod, prepared amazing resources for our members. It culminated in a new webpage, [www.illinoisheartland.org/embargoes](http://www.illinoisheartland.org/embargoes), including an IHLS Board Resolution, plus information sent via web blast, newsletter, and social media.



## MEMBERSHIP REPORT & STAFF ACTIVITIES

*Submitted by Ellen Popit, Associate Director*

Labor Day certainly did mark the start of a new season of system activity. The month kicked off with the Rural Library Conference in Vermont, which again proved to be an unmatched networking opportunity!



With the conclusion of summer reading, networking groups started meeting again. Having system staff participate is a valuable method of assessing the concerns and needs of our member libraries.

### MEMBERSHIP GOALS:

Review membership of all system agencies on an annual basis. Support member libraries in their efforts to provide excellent library service to their stakeholders.

- September 20<sup>th</sup>  
Ellen Popit visited the Palestine Public Library and the Palestine Elementary School Library
- September 23<sup>rd</sup>  
Anna Yackle made a site visit to the Mahomet Public Library



# Membership Report

---

- Attended a Carbondale Regional chamber event to build relationships and subtly advocate for IHLS.

## NETWORKING GOALS:

Continue to develop relationships with and among the membership. Continue active partnerships in statewide and national initiatives that support enhanced library service. Work with library entities that improve member services.

- September 3-7  
Ellen Popit and Anna Yackle attended the Association for Rural and Small Libraries Conference in Burlington, VT.
- September 4<sup>th</sup>  
The monthly Director's Chat was held and facilitated by Cassandra Thompson.
- September 9<sup>th</sup>  
Ellen Popit participated in the Illinois Library Association's Public Policy Committee Meeting.
- September 12<sup>th</sup>  
Anna Yackle and Joan Bauer attended the Health Sciences Library Conference in Champaign.
- September 17<sup>th</sup>  
Troy Brown, Shandi Greve Penrod, and Ellen Popit attended a Regional Chamber of Commerce meeting in Carterville, IL. The focus was marketing.
- September 19<sup>th</sup>  
Anna Yackle attended the networking group of Perry/Randolph County at Chester Public Library.
- September 23<sup>rd</sup>  
Anna Yackle attended the East Central Director's networking group at the Blue Mound Public Library in Mansfield, IL
- September 24<sup>th</sup>  
Anna Yackle attended the Medium Pubs meeting at the Rochester Public Library. In the morning, a smaller group of library directors met to discuss the increase in the minimum wage.
- September 27<sup>th</sup>  
Ellen Popit attended the Small Pubs meeting at the Tri-City Public Library in Buffalo, IL.
- Participated in a Reaching Forward South committee meeting with the Illinois Library Association to discuss a potential partnership.

## CONTINUING EDUCATION GOAL:

Increased continuing education opportunities as allowed by ISL directive.

- In September and moving forward, there will be much focus on Member Day planning by many staff members.