



# Illinois Heartland Library System



## JULY 2020

## DIRECTOR & STAFF ACTIVITY REPORT



# Administrative Report

## ADMINISTRATIVE REPORT & STAFF ACTIVITIES

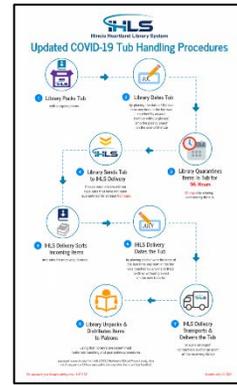
Submitted by Leslie Bednar, Executive Director

### COMMUNICATIONS GOALS:

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

Communicate effectively and efficiently with IHL S stakeholders. Advocate for the organization and our members.

### Highlights:



**On the road again...**An encouraging sign in July was the return of Delivery service and SHARE interlibrary loan holds. Several messages went out to the membership by email, website, and social media to prepare the libraries for the new procedures. The first two images included here announced these events on social media to both the libraries and their patrons. While both posts performed better than usual, the SHARE post was shared 64 times and reached 7,218 people! An infographic—requested by the Delivery department to better explain the tub quarantine procedures and lovingly named the Library's Illustrated Guide to Pandemic Tub Handling Procedures—depicted the sometimes-confusing procedures in an easy-to-understand, visual way; the infographic was provided in poster format digitally through the website and email and in printed form through the Delivery tubs.

**Two retractable banners** have been on a wish list, and it's great to get the banners completed, ordered, and received! The banners will be used as a visual brand marketing tool at conferences and events. While the designs are different, the banners were created to work together, each on their own, or in coordination with the large conference display.

Planning continued for the transition of **IHLS Member Day** to a virtual event, to happen on November 10. Sponsor recruitment and communications likewise need adapting.

To improve accessibility providing comment at public board meetings, a **public comment form** was created and added to the board webpages along with the approved procedures for commenting at IHLS board meetings.



In conjunction with the Membership Department, Communications/marketing staff planned and promoted a Census 2020 advocacy CE event, **Make Your Community Count! Public Libraries & the Census Today**, to take place on August 10.

#### Promotion:

- *Advocacy:*
  - *IHLS*
    - Article: [Proving Libraries' Worth When Doors are Closed with ILA's Bigger Than a Building Talking Points and Toolkit](#) (also a CE article)
    - [Make Your Community Count! Public Libraries & The Census Today with Joe Natale](#) (also a CE event)
  - *CMC*
    - CMC Pandemic Activity
- *CE & Networking events/opportunities:*
  - *IHLS*
    - Weekly Directors' Chats & transcripts (multiple)
    - Library Link Roundup 7/31/20
    - IACRL Fall Semester Town Hall
  - *SHARE*
    - Cataloging Training Sessions
- *Discounts and demos:*
  - *IHLS*
    - Patron Point Marketing Automation demo series

#### General Communications:

- *IHLS*
  - Assurance of Delivery
  - IHLS Staff Connection 7/31/20
  - IHLS Member Connection 7/22/20
  - IHLS L2 Data Freeze action items (multiple)

- Tub Handling Time Increased to 96 Hours
- Delivery Handling Procedures & Infographic (multiple)
- Reopening Need-to-Knows
- Grants
- Board Action Summary
- *SHARE*:
  - SHARE Newsletter 7/14/20
  - Back to School Newsletter
  - Input for Committee Agenda

**Formal research:**

- Help Us Create a Better Website! (survey by 3<sup>rd</sup> party on our behalf *and* A/B test for email image content)
- IHLS Research Panel recruitment phase 1

**Trainings events attended by department staff:**

- Social Media Conference – Fred Pryor
- The Exceptional New Normal – Nonprofit Marketers Network
- Using the new Library Learning (L2) system – RAILS L2 development team

**Networking events attended by department staff:**

- Directors’ Chats

**Social media insights:**

- Facebook: 27 posts in July
  - *Awareness*: 13,170 total post reach, 425 average post reach, 17,843 total post impressions
  - *Engagement*: 837 post engagements, 30 avg. post engagements,
    - SHARE Interlibrary Loan post reached 7, 218 people, 691 engagements, and was shared 64 times.
  - *Change*: +8 likes, +11 followers
- Twitter: 5 tweets in July
  - *Awareness*: 1,878 Tweet impressions
  - *Engagement*: 1 post engagements, .2% post engagement rate
  - *Change*: +1 follower

**BOARD SUPPORT GOALS:**

*Submitted by Stacie Bushong, Executive Assistant*

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

- Coordinate orientation for newly elected board members
- Create public comment procedure along with Communications team



# Human Resources Report

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*Submitted by Dominique Granger, Human Resources Business Partner*

The Human Resources department is currently looking at ways to streamline our current hiring process. Our current process includes recruitment, interviewing, background check and drug screening, and final approval from the Board of Directors. The current health emergency has offered an opportunity for efficiency. While we were able to hire a new driver for our Edwardsville location this month, we lost two drivers due to date of hire. In speaking more with the candidates, we found the wait between backgrounds and final approval leaves room for them to continue their job search with other agencies. This provides opportunity for qualified candidates to start at other companies faster as their hiring process is currently shorter than ours. We are in search of a more effective hiring process for staff and applicants.

The Human Resources department has also began looking into a more formal human resources information system. Two vendors have been contacted so far. The department is looking forward to the opportunity of an updated information system. An updated HRIS system will allow for a more efficient way of maintaining proper personnel records. This will help to ensure legal compliance and will ease the overall communication regarding benefits and payroll. It will also improve departmental operations across the company as a whole, offering one system for all to access.

The Human Resources Business Partner has been working with some of Illinois Heartland Library System members regarding questions and concerns within their everyday administrative duties. The goal is to work closer with our library members to ensure that everyone is empowered with information to navigate through their jobs confidently and effectively.



# Accounting Report

## ACCOUNTING REPORT & STAFF ACTIVITIES

*Submitted by Rhonda Johnisee, Finance Director*

The Finance department completed the SHARE and OCLC annual billings for July along with preparing for the FY2020 annual IHLS and OCLC audits.

Below is a picture of some of the SHARE invoices that went out to member libraries.

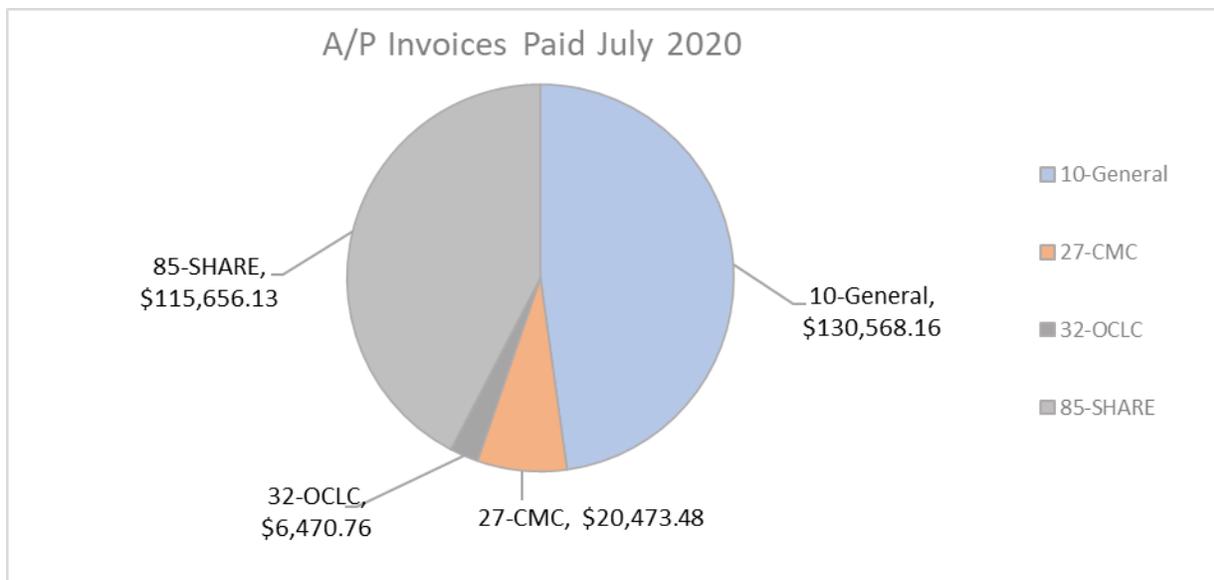


### ACCOUNTING GOAL:

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.

- Attended weekly staff High-5 meetings.
- Attended an L2 training.
- Attended meeting with representatives from System Wide Automated Network (SWAN) and Online Computer Library Center (OCLC).
- Attended a meeting with Greg McCormick with the Illinois State Library (ISL).
- Attended an IHLS Member Day meeting.
- Attended a meeting with representatives from Enterprise.
- Attended a Marketing Team meeting.
- Attended a Fred Pryor "Payroll Law" online seminar.
- Attended an "AskIT" meeting.
- Attended COVID-19 Response team meetings.
- Submitted Federal and State Quarterly 941s and State Unemployment tax reports.
- Submitted the quarterly OCLC Grant report to the Illinois State Library.
- Provided financial data for the CMC and the MARC of Quality quarterly grant reports.

- Prepared for the annual IHLS and OCLC audits.
- Attended Leadership Team and Supervisors meetings.
- Attended IHLS and SHARE Finance Committee and IHLS Board of Directors meetings.
- Prepared and processed two payrolls in July.
- Prepared June 2020 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 1,774 accounts receivable invoices (OCLC: 751 Annual, 14 Monthly, 5 Quarterly, and 58 Transactional; SHARE: 439 Annual, 2 Monthly, 31 Quarterly, 6 Transitional, 4 Implementation Fees, 228 Cloud Subscription, 51 RBdigital Subscription, 12 Gale Subscription, and 140 Bibliographic Services; General: 1 ILDS Project, 8 SWANK, 16 Serving Our Public Books, and 8 Library Law Books).
- Received and posted 333 accounts receivable cash receipts checks totaling \$515,865.16 (OCLC: 83, SHARE: 204, and General: 46).
- Received and entered 86 accounts payable invoices.
- Disbursed 59 accounts payable checks totaling \$273,168.53.





# Information Technology Report

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

*Submitted by Troy Brown, IT Director*

July was a busy month, but one project in particular took a bit longer than expected. During a planned upgrade of our main SHARE server farm, from Windows Server 2016 to Windows Server 2019, it was discovered that an ethernet port on one of our main switches was faulty. This didn't cause any interruption in service as everything is redundant at the facility. However, what it did mean was our Network Administrator, Brandon Chapman, was at the facility until 2 a.m. waiting for the parts to be delivered and a Dell technician to come and install the replacement. We have a 4-hour critical response on all our servers at the facility at the University of Illinois Champaign/Urbana. It's just too bad we didn't find out until the end of the maintenance day. A big thank you to Brandon for sticking it out all alone there. Otherwise, the upgrade of the servers went perfectly to plan.

All new Xerox copiers are in place and working great for Edwardsville and Champaign.

Zoom continues to tighten their security on meetings. While it does create a few headaches for people hosting meetings, the changes are good.

IT staff is looking at tightening our already tight security. With more of our business being conducted in the cloud, we are encouraging our staff with elevated security clearance, primarily IT staff, to use multi-factor authentication (MFA) methods for logging into our accounts. With this, passwords are changed to randomly generated strings that are stored in encrypted password managers.

### **IT GOALS:**

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

- Initial user group focus survey has gone out, and meetings between the vendor, Red Rokk, and IHLS IT have continued.



# Bibliographic Access

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## **BIBLIOGRAPHIC REPORT & STAFF ACTIVITIES**

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

Recorded catalogers training sessions housed in the SHARE training portal have been a wonderful asset during the pandemic while in-person training is not possible. New staff members at various libraries have been able to watch a couple of recorded sessions in order to get barcoding permission in Polaris. These training sessions include instruction on finding a matching bibliographic record and creating item templates, item records, and record sets. Serials module training is also available online. SHARE trainers have met several times to discuss more options for safely training Polaris users.

Catalogers are beginning to see an increase in items arriving for cataloging. The summer months are usually a slower time for cataloging, but libraries started to send books and other materials in as soon as the delivery service resumed.

### **CATALOGING SERVICE FOR SHARE GOAL:**

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

- Cataloged 616 items for SHARE member libraries.
- Imported 207 \$3 bibs for SHARE member libraries.
- Cataloged 28 items for new member libraries joining SHARE.
- Merged 687 bibliographic records, cleaned/corrected 4,028 bibliographic records, and cleaned up/corrected 467 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.

- Taught one cataloging-related class, the monthly Catalogers Training Session.
- Created an online Searching presentation.
- Created an online Barcoding I class.
- Continued working on an introductory MARC coding online tutorial.
- Provided links to online barcoding classes while in-person classes are not possible.
- Handled over 239 emails and contacts.
- Reviewed and imported 14 files with a total of 68 bibliographic records for beginning catalogers.

### **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.

- Cataloged 78 items for libraries in Illinois.

- Created 4 NACO name authority records for improved user access.
- Handled over 42 emails and contacts.
- Continued working on an oral history project for Marshall Public Library.
- Continued working on the cleanup project for the PrairieCat group of automated libraries in north central Illinois.
- Taught a subject analysis course in Moodle.
- Started working on an online Illinois Library Association conference presentation which will be given by 2 CMC staff and 3 outside panelists.
- Gave a Cataloging Maintenance Center presentation for Illinois State University's school library class.
- Cataloged archival materials for the Lincoln Library in Springfield.

## DELIVERY REPORT & STAFF ACTIVITIES

*Submitted by Susan Palmer, Operations Director*



Being open to whatever comes next is what keeps us flexible. The REALM project (**REopening Archives, Libraries, and Museums (REALM)**) is a research partnership between Online Computer Library Center (OCLC), the Institute of Museum and Library Services (IMLS), and Battelle to create and distribute science-based information and illustrative practices designed to reduce the risk of transmission of COVID-19 to staff and visitors who are engaging in the delivery or use of museum, library, and archival services. They have been busy testing the COVID-19 virus on various library surfaces such as books, DVDs, children's board books, and even magazines to determine how long the virus exists on these surfaces. Recently, they tested these items in stacked configurations. It was determined that the virus was viable up to 96 hours. Based upon their findings, IHLS Delivery has asked our member libraries to now quarantine the tubs of items for delivery to 96 hours, instead of 72. This will allow the sorting in delivery to begin right away when the drivers bring back the tubs. And by spreading the quarantine location for the tubs over all libraries, makes delivery possible. **We appreciate the partnerships.** Unfortunately, we do not have the space in our current hub locations to quarantine every library's items.

We have had to purchase more tubs. It just needed to be done. We need to provide the libraries with the correct containers, and we have phased out the canvas bags. We just keep thinking that at least we are soooo much cleaner than before, which will help overall in not sharing germs, not just COVID-19. In our sorting areas, we have hourly hand washing time. All employees are

wearing masks. We have spray bottles full of disinfectant that we use on the outside of all tubs, while also paying special attention to high touch areas. Our drivers have cleaning supplies for the inside of their vans as well as hand sanitizer. We are in the process of having plexiglass dividers built for our vans. One divider per location, solely for the purpose of training new drivers. As a driver comes on, we will insert the portable divider into the van they use for that day. This puts the trainer driver at ease as well as the trainee.

We began full “regular” delivery on July 6, 2020. By the end of the month, we were in a groove. We were encouraging the libraries to tell us directly what delivery looks like for them. It may be that the library requests only 3 days a week. Okay, no worries. We are responsive to member needs. We would like to be just an everyday occurrence in their processes that they do not have to worry about. We are just there, dependable and available.

The working group of libraries and delivery staff met to look back at how the processes we had adopted were working, and if the processes were not, what could we do instead? We want to be efficient as well as economical. Were we meeting the needs of the library? There was a bit of confusion regarding the quarantine procedures and why. Delivery reached out to Shandi Greve Penrod, IHLS Marketing Coordinator, and she came up with a graphical representation of what the process was and why. This poster made a huge difference in the number of calls and emails coming in with confusion from the libraries. Thank you, Shandi!

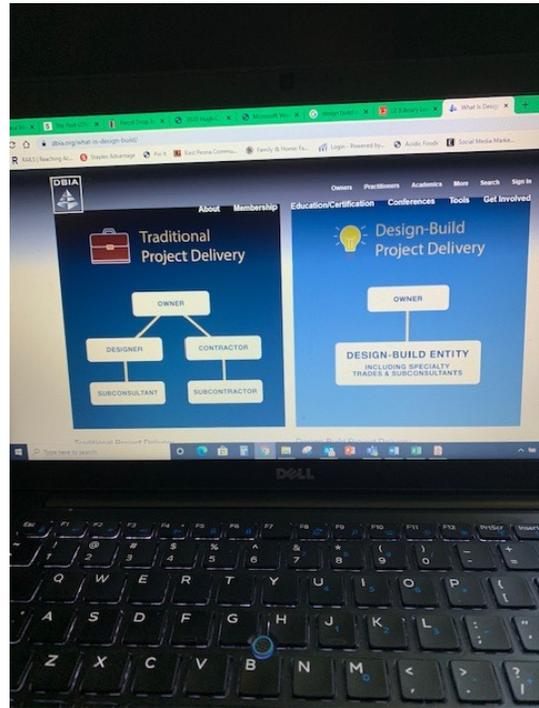
Yes, July was full of formulating processes and re-formulating processes.

Meetings attended:

- 8 Delivery meetings with the managers/coordinators
- 2 Delivery meetings with ALL delivery staff (once a week)
- 4 Leadership meetings
- 4 Directors chats
- 3 High Five internal meetings (all staff)
- 2 Governor Pritzker updates online
- Enterprise Fleet Management meeting
- Helitech meeting to repair mine subsidence sink holes
- Color Art meeting to discuss Edwardsville remodel
- Association of Specialized Government and Cooperative Library Agencies (ASGCLA) under American Library Association (ALA) Physical Delivery Interest Group
- ILA (Illinois Library Association) Awards meeting
- ILA Orientation meeting
- IHLS Board meeting
- Illinois State Library (ISL)/Illinois Heartland Library System (IHLS)/Reaching Across Illinois Library System (RAILS)/Consortia of Academic and Research Libraries in Illinois (CARLI)
- Statewide meeting with ISL, IHLS, RAILS, Chicago Public Library (CPL), and CARLI to discuss Illinois libraries



Creative dividers



Models for RFP



Bookmobile Census



Co-workers

## SHARE REPORT & STAFF ACTIVITIES

*Submitted by Cassandra Thompson, SHARE Director*

This was a very exciting month, as libraries began sending and receiving interlibrary loans! The holds routing sequence was activated for the majority of our public libraries on July 1, 2020. The SHARE staff were here for support as our members were navigating new models of service.

Here are some of the (actual) comments from our member libraries and patrons:



### LLSAP (SHARE) GOAL:

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

- Attended an ASGCLA (Association of Specialized, Government, and Cooperative Library Agencies) Online Moodle Course: Negotiating License Agreements and Pricing with Confidence.
- Attended ICOLC (International Coalition of Library Consortia) Virtual Conference July 20-22.
- SHARE Finance & Policy Committee met on July 16, 2020 to discuss the revised CMC/SHARE budget, COVID-19 response, and the Patron Point marketing automation software.
- SHARE Bibliographic & Cataloging Standards Committee met on July 17, 2020 and reviewed member comments for a proposed change to recording publication and copyright dates, and to suggest additional changes to general material designation, genre terms, and self-published items.
- SHARE staff participated in a training for the new replacement L2 on July 15, 2020. More training specific to LLSAP staff will follow in August, for a tentative release in the latter part of the month.
- Attended weekly COVID-19 response team meetings and the delivery COVID-19 members' work group meeting on July 21, 2020.
- Worked with Swank Movie Licensing, Inc. to offer existing customers and IHLS group purchase members bonus features to their group contract. It includes an additional six months of service to help add value to the existing contract and an opportunity to show

a select list of titles outdoors on library property to maintain social distancing. We also highly encouraged Swank to consider offering this feature as a regular part of their future contract, in order to support our smaller libraries that do not have the space to show indoor films.

#### **LLSAP DEVELOPMENT GOAL:**

Increase members participating in SHARE.

- Attended weekly IHLS Directors' Chats.
- We are happy to welcome our new transitional member, Gillespie CUSD 7, Ben-Gil Elementary School. Go Miners!
- We have also added a new member, Bismarck-Henning Elementary School. Go Blue Devils!
- Sent a welcome back letter to all of our school library members. It included information about managing interlibrary loan, deliveries, closing dates, staff changes, and training.
- Sent our monthly newsletter, which included a member feedback poll, advocacy tips, training, and a request for member comment for the SHARE Bibliographic and Cataloging Standards Committee.

#### **E-RESOURCES GOAL:**

Increase familiarity with and utilization of eresources.

- CloudLibrary users checked out 39,252 owned titles and 1,041 pay-per-use titles.
- The cloudLibrary access for all SHARE members ended in June, but we received an additional 9 new cloudLibrary members for FY2021.
- Members were offered an option to add additional funds to the shared collection development fund. Members added an additional \$2,125 to our shared purchasing funds.
- Met with PressReader to discuss a potential vendor discount.
- Offered demos for Patron Point marketing automation software on July 16, 21, and 29. This software uses APIs to integrate Polaris and eresources, making it a great solution to advertise digital collections.
- Explore More Illinois cultural attraction program is now available for IHLS members!
- In our welcome back to school letter, we included pricing for SHARE schools to join our cloudLibrary consortium as a supplement to remote learning.
- *Big news!* There were several big eResources announcements shared with members in early July:
  - [MacMillan CEO John Sargent steps down from day-to-day operations.](#)
  - [Overdrive](#) is offering free, simultaneous use anti-racism titles for members.
  - RBdigital has been purchased and existing customers will transition to the Overdrive platform. It was also announced that Recorded Books will no longer provide exclusive content, and audio will now be available for sale via cloudLibrary. More details will be coming soon.
  - RBdigital information sessions were held on July 7 and 16, 2020 to discuss this development.



# Membership Report

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## MEMBERSHIP REPORT & STAFF ACTIVITIES

*Submitted by Ellen Popit, Associate Director*

In reviewing activities involving membership through the month of July, one activity seems to be a central focus. That activity is the weekly Directors' Chat, which is currently held from 1:00-2:00 p.m. on Thursdays via Adobe Connect. Adobe Connect is by no means cutting technology--it is a simple text chat. However, participants have consistently told us that it remains their preferred platform for this conversation.

Prior to COVID-19, this was a very relaxed event held on the first Wednesday of every month, usually attracting around 20 people. When these chats were first implemented, that is exactly what they were intended to be--a space where library workers could hang out online and "chat."

COVID-19 changed all of that. On March 10<sup>th</sup> we hosted a *Directors Chat--COVID-19* event with 64 registrants that included staff from the Illinois State Library and the Illinois Library Association. We began hosting the biweekly sessions beginning on March 23<sup>rd</sup> and continued this schedule through the first week of June. At that point, the chats moved to the current weekly format. Registration for these chats has been consistently robust.

Over these many weeks, these chats have been an invaluable source of shared information for our member libraries, but more importantly, they have been an opportunity for mutual support at a time when it is needed by the entire library community. As low-key as they are, these Directors' Chats have proved their value in these challenging times and are a fine example of small, consistent efforts making a real difference.

### **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.

- A significant focus during July was getting data in our Library Learning (L2) database cleaned up and ready for the upcoming reboot. Having accurate information in that database is critical for meaningful communication with our members.

### **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.

- Both Ellen Popit and Anna Yackle participated in the ILA Orientation held on July 16<sup>th</sup>.
- Anna Yackle has continued to work with Directors U through the summer, as well as planning for ILA's upcoming webinar: "Reopening Small and Rural Libraries."

- Ellen Popit continued involvement with the Association of Illinois Library Educators (AISLE) Advocacy Committee.

**CONTINUING EDUCATION GOAL:**

Increased continuing education opportunities as allowed by ISL directive.

- Planning for Member Day is ongoing.