



# Director & Staff Activity Report

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## MARCH 2019

As Illinois Heartland Library System (IHLS) moves through its eighth year as a service organization in central and southern Illinois, we are not content to rest on our laurels. Our services are designed to benefit all 520+ member libraries and the communities they serve. We have made significant improvements in these areas and look forward to another meaningful year.

## ADMINISTRATIVE REPORT & STAFF ACTIVITIES

### EXECUTIVE DIRECTOR'S REPORT

*Submitted by Leslie Bednar, Executive Director*

#### Connect the Dots

IHLS staff spent the month of March engaged in a few additional projects that move our organization forward:

- preparation for the FY2020 System Area and Per Capita Grant (SAPG) application with its primary components of our Operational Plan and Operational Budget(s)
- evaluation of member responses to our Strategic Plan survey
- consideration of Strategic Plan elements for inclusion in FY2020 Operational Plan

While our annual operating grant is a routine process, the care and consideration we give its contents is not. Our finance staff gather data, analyze cost trends and project fund usage throughout the fiscal year to provide a quite accurate estimate of routine expenses. Combined with project managers' research for new initiatives based on service objectives, this budget creates a compelling and thoughtful financial picture of the coming fiscal year. You will find the first draft of the FY2020 Operational Budget(s) in this month's board packet.

From the beginning to the end of March, our staff was engaged in an examination of the current year's Operational Plan and redesigned FY2020 Operational Plan. Perhaps the Ides of March breathed new life into our process. Or more likely opening the creation, editing and review to every level and every department of our organization led to a more focused and intentional statement for the organization. The first draft of our FY2020 Operational Plan is also included in this month's packet. We will review it at the board meeting and I encourage all of our stakeholders to consider how it meets the vision, mission, values and goals outlined in our [Strategic Plan](#).

As we crafted the new Operational Plan, we remained aware of responses to the Strategic Plan survey that went out to members this winter. Members expressed the desire for continued

services such as networking opportunities in a variety of formats, delivery, SHARE, training, e-resources and our various communication channels. They also requested information and training in a few key areas like trustee resources, grant writing, legal compliance, board training and human resources. We have directly addressed some of these needs in the FY2020 draft document and have left room to approach others as well in the coming year. Our goal is to ensure that our members see we have answered at least some of their stated needs through the outline of our planned activities in FY2020.

I firmly believe it is crucial for all staff to “see themselves” in the plan. IHLS is a service organization. We go to work for several reasons, and for many of us, we choose to work at IHLS because we believe what we do makes a positive difference in the lives of others. All staff should see how their work output/effort contributes to the big picture of resource sharing in Illinois.

*So how does this happen?*

Step 1: Active staff involvement in creation of the plan. This includes a review of IHLS’ Vision, Mission, Values and Goals to ensure we are proceeding with awareness of this foundational document.

Step 2: Each department/team creates goals that support IHLS’ goals and values.

Step 3: Each individual employee/team member works with supervisor to draft individual goals which support department goals.

Step 4: Staff evaluations July 2019 will set individual goals from Step 3.

Step 5: Staff evaluations July 2020 will include assessment of said goals. FY2021 Operational Budget(s) will include **COL increases applicable to all staff**. In addition, a portion of FY2021 funding will be set aside for merit increases. Merit increases will be based on July 2020 staff evaluations and assessments.

Each fiscal year, library systems engage in this iterative and dynamic process. If we are able to see the ultimate goal, and our own individual role in making that happen, it is an exciting and revitalizing practice. The cycle continues and the goal is never-ending.



## COMMUNICATIONS

**Goals: Effective and efficient communication with IHLS stakeholders. Rebranding to continue increasing visibility within the community. Advocacy for the organization and our members.**

- Shared upcoming events and deadline during the March 6 Directors' Chat. This online chat facilitated member networking and acted as a resource for members to share ideas and questions.
- Initiated development of an overarching social media plan to enhance content for and communication with all four major library types.
- Collaborated with finance department to create the public relations line budget for FY20.
- Worked with Nebraska University for a member-initiated event on March 29, [Intellectual Freedom and Professional Ethics in Libraries](#). Using in-person, videoconferencing, and online Zoom methods, the event was open to staff from any library in Illinois and was well attended. Guest speaker Jamie LaRue was engaging and enlightening.
- Welcomed Shandi Greve Penrod, the new Marketing Coordinator. It will be great to work with her and have fresh eyes look at materials and information being sent out.
- Continued work on the [Reaching Forward South](#) conference on May 17. This year the theme is *The Future is ALWAYS Beginning Now*. Several great sessions are planned: Attracting, Keeping, and Educating Good Board Members, Cataloging Maintenance Center (CMC), Census 2020, Going Fine Free, and Alternatives to Dewey. Most of the sessions are presented by IHLS member libraries, Illinois State Library staff, and IHLS staff.
- Created promotional materials for [Design Thinking for Libraries](#). This one-day workshop will be held on June 12 and 13. For libraries, this workshop fulfills the organizational management continuing education requirement for the State of Illinois FY2020 Per Capita Grant.



## HUMAN RESOURCES REPORT & STAFF ACTIVITIES

*Submitted by Dominique Granger, Human Resource Generalist*

The Human Resources department has begun taking the newly created orientation presentation on the road conducting a session in the Carbondale office on March 1. The System had the pleasure of welcoming Shandi Greve Penrod to the IHLS team on March 13, and she has been bringing great ideas and insights to IHLS. We are super excited to have her. The SHARE department had the pleasure of conducting Metadata Cataloger in-person interviews at the Champaign hub. They were also able to identify a candidate to hire and look forward to her starting in April.

### HUMAN RESOURCES

**Goal: 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.**



Live workshop or online training	Format	# of staff
Modern Information Systems- IT Infrastructure Part 1	Online	1
Modern Information Systems- IT Infrastructure Part 2	Online	1
Use the Quick Analysis Tool in Microsoft Excel 2016	Online	1
Strength Finders 2.0	Online	1
How Great Managers Become Leaders	Live	2
A Manager's Overview of the Family Medical Leave Act	Online	1
The Controllers' Workshop	Live	3
Intellectual Freedom and Professional Ethics in Libraries	Live	10

## INFORMATION TECHNOLOGY REPORT & STAFF ACTIVITIES

*Submitted by Troy Brown, IT Director*

March was a very productive month for IT as we finalized many projects that we'd been planning for several months. First, the upgrade to Polaris 6.2 was overdue and much needed. One of the main issues was browser compatibility with LEAP (staff web-based Polaris client) and the patron's OPAC (portal to search books). Many of the issues we were experiencing immediately resolved with the upgrade.

Secondly, the capital expense to expand the backup capabilities of the SHARE platform was finished. Brandon finished the physical install and configuration of the servers, and we now have more space, speed, and redundancy for our backups.

Finally, the Champaign office got some much-needed upgrades to their network. They had a single wireless access point for the whole building, so we upgraded the access point that was there and installed a second one. Also new wiring was run for the timeclock and driver computers. Edwardsville and Carbondale also upgraded their wireless access points to the same model.

### IT

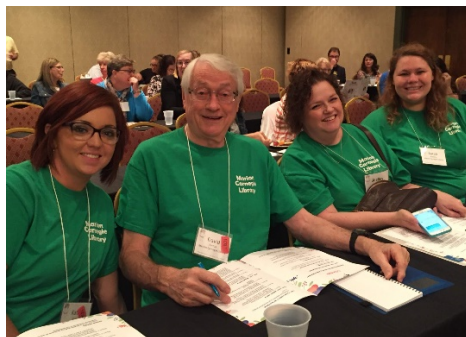
**Goals: To provide the IT support necessary for IHLS and SHARE to function efficiently. Support rebranding effort by implementing a new website design to IHLS website.**

- RFP (Request For Proposal) was released and awaiting responses which are due on May 23.

### BOARD SUPPORT

**Goals: Refine process for future board and committee meetings. 100% State and Federal Compliance for IHLS Board and appropriate IHLS staff.**

- Scheduled 2019 Member Day for November 7 and secured Keller Convention Center (Effingham) as the venue. Also began coordinating the event and gathering team members to execute plans.
- Finalized Member Day Survey to send to membership in April.
- Coordinated date change for the April board meeting to allow more time for the draft Operational budget(s) to be prepared.



Marion-Carnegie Public Library Staff



2018 Member Day Prizes

## MEMBERSHIP REPORT & STAFF ACTIVITIES

*Submitted by Ellen Popit, Associate Director*

The focus for the Membership Services team during March was guiding the IHLS membership through the two-step certification process. It involves the completion of an Interlibrary Loan Traffic Survey and an online certification. Where seasoned veterans have no problem with this annual task, new staff members and administrators often need some help and some forceful nudging.

**Goals: Membership of all system agencies will be reviewed on an annual basis. IHLS will continue to develop relationships with and among the membership. Continue active partnership in statewide and national initiatives that support enhanced library service. Work with other library entities within the state among others.**

- Work in March was very focused on the certification process. All IHLS members completed the certification process, with the final agency submitting on the morning of March 29, 2019.
- On March 22<sup>nd</sup>, Anna Yackle conducted site visits at the Elkhart, Mt. Pulaski and Maroa libraries.

### NETWORKING

**Goals: IHLS will continue to develop relationships with and among membership. Continue active partnership in statewide and national initiatives that support enhanced library service. Work with other library entities within the state among others.**

- Ellen Popit attended the Cooperative Collection Management Workshop at the Red Bud Public Library on March 5<sup>th</sup>.
- Ellen Popit and Anna Yackle attended the ILA Trustee Workshop held at the Illinois State Library on Saturday, March 9<sup>th</sup>.
- Ellen Popit presented at the Illinois Youth Services Institute on Friday, March 22<sup>nd</sup>.
- Anna Yackle participated in a conference call related to Directors' U on March 29<sup>th</sup>.

### ACCOUNTING OPERATIONS

**Goal: Equip IHLS Administration and Board of Directors with effective reporting of financial transactions to encourage good stewardship through decision making.**

- Provided IHLS Administration and Board of Directors with monthly financial reports and a detailed narrative was given at the Board meeting.
- Worked with the Operations department to settle the totaling of two IHLS courier vans that were involved in separate accidents.
- 2 staff members attended "The Controller's Workshop".
- 2 staff members organized and completed a portion of the IHLS legacy system shred of approved records for destruction.
- 3 staff members met with LIRA (Libraries of Illinois Risk Agency) to review the proposed changes to our current insurance coverage and what potential rates could be for IHLS.
- 3 staff members prepared FY2019 SHARE end-of-year estimate and financial documents for the SHARE Finance Committee meeting.



- 2 staff members reviewed FY2020 calculations for SHARE Annual Fees.
- 3 staff members assisted in the mailing of the FY2020 SHARE Annual Fee Agreements.
- 2 staff members completed analysis and met with individual departments for the FY2020 budgets draft.
- 1 staff member attended the “Intellectual Freedom & Professional Ethics for Libraries” event.



## LONG RANGE PLANNING

**Goal: Recognize and incorporate facets three-year plan approved by board in October 2015.**

- A survey was created and submitted to membership for completion that will impact the operational plan for FY2020.

## BIBLIOGRAPHIC ACCESS STAFF ACTIVITIES

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

We have a new cataloger in the Carbondale office. Dena Porter has already added over 100 bibliographic records to the SHARE database in her first weeks on the job. She is fitting in nicely with the rest of the staff. Welcome Dena!

The cataloging department has been very busy this month with physical items, but also with a huge increase in the number of \$3 bib requests. A new record number of \$3 bib requests were submitted and processed in March.

## CATALOGING SERVICE FOR SHARE

**Goals: Provide cataloging services for SHARE member libraries, including transitional libraries, and increase usability of the SHARE database by cleaning up duplicate records and incorrect cataloging and maintaining authority files in the SHARE database.**

- Staff cataloged 644 items for SHARE member libraries.
- The number of \$3 bibliographic records imported this month was a huge increase, up to 478.
- Staff created 65 on order records.
- Staff cataloged 128 items for new SHARE libraries.
- Staff merged 229 bibliographic records, cleaned up/corrected 2,707 bibliographic records and corrected/cleaned up 33 item records.

## CATALOG TRAINING FOR SHARE MEMBERS

**Goal: Increase the understanding and skills 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 1 cataloging related class with 9 participants and presented 1 Cataloger's training session with 54 participants. 16 others have viewed the recorded session.
- Staff handled over 135 emails and contacts.
- Staff reviewed and imported 62 bibliographic records for beginning catalogers.

## CATALOGING MAINTENANCE CENTER (CMC)

**Goals: Provision of cataloging and bibliographic services for libraries in Reaching Across Illinois Library System (RAILS) and IHLS in order to increase access and encourage resource sharing of information resources found in Illinois libraries and at IDA by providing information on formation and content of metadata. Facilitate the development of expertise in the use of resource description, including cataloging and metadata, among library staffs in Illinois.**

- CMC staff cataloged 260 items for libraries in Illinois.
- Staff created 16 NACO name authority records for improved user access.
- Staff presented at RSA (Resource Sharing Alliance) Day in Peoria and made many new contacts.
- The online book cataloging class presented by the CMC has 54 participants.
- Staff transcribed oral histories for Marshall Public Library.

## THE MARC OF QUALITY (TMQ)

**Goals: Improve the quality of the SHARE database, thus improving user access to information resources. Add OCLC WorldCat holdings for member libraries in a timely manner, increasing resource sharing.**

- The file was sent to update OCLC holdings. Staff continue to work on cleanup reports.

## DELIVERY & OPERATIONS REPORT & STAFF ACTIVITIES

*Submitted by Susan Palmer, Operations Director*

Delivery had some significant changes to the ILDS (Illinois Library Delivery Service) exchange in Champaign. Starting March 4, RAILS changed their process by sending a van from Rockford to meet in Champaign. In addition, they combined their Coal Valley location with their East Peoria location to meet also in Champaign. Stephen Downes, IHLS ILDS coordinator, did a wonderful job of creating a process that would allow all 5 hubs to efficiently exchange their items. It is truly a clockwork operation and amazing to see how that team (IHLS and RAILS) work together to switch out over 2 million items annually.

Leslie Bednar and I gave a presentation about our library system to the Edwardsville Rotary Club. Personally, I think we could take this on the road now. We had positive feedback and I think the audience got the point that library systems and libraries are part of a bigger picture



and one of the great things that Illinois does well. Feel free to reach out to us if you are looking for explanation of what a library system is and does!

One of our delivery staff was involved in a serious accident; however, our driver is recovering. All IHLS delivery vans have bulkheads and this stopped the tubs of items from crashing into the cab of the van. This information has been shared with IHLS staff and with RAILS management.

Arlanna Fries, our Carbondale hub manager, resigned, and we wish her well in her new endeavor. She will be missed. Instead of quickly replacing this position, we are taking a moment to pause and evaluate exactly what is needed for that location. One duty that is not required of the Carbondale manager is having to deal with building issues. That is a significant part of the managers' job in both Edwardsville and Champaign. If something breaks or needs to be fixed in either of those locations, the manager will have to go out for bid (normally) to repair the item. In Carbondale, we simply call the office manager for the building and they take care of it. We are doing our due diligence to make sure that our processes are still being done the most efficient way. By the end of April, we should have a plan for moving forward.



## SHARE REPORT & STAFF ACTIVITIES

*Submitted by Cassandra Thompson, SHARE Director*

In March, we had many vendor opportunities, including CreativeBug from JOANN Fabrics and *The New York Times*! Other projects included planning for FY2020, both for budget and thinking of our operational plan. There were also two demos to members. The first was to the newly formed Book Club Kit Resource Sharing Group to view a new kit reservation software. The second was a demo of the RBdigital platform, which has recently changed and expanded. In other exciting news, members were involved in the selection of the new SHARE logo, which will be announced in April. SHARE also welcomed new staff members, including Zach Henderson (Circ Specialist) and Dena Porter (Cataloger).

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

- Annual Agreements were sent for directors to review for FY2020.
- The SHARE Executive Council met on March 7.
- SHARE Finance & Policy Committee met in person on March 14 in Edwardsville.
- SHARE Bibliographic & Cataloging Standards Committee met on March 15.
- SHARE eResource Committee met on March 25.
- Sent survey to members for proposed procedural changes, like auto-renewals.

## LLSAP DEVELOPMENT

**Goal: Increase members participating in SHARE.**

- Met with Scott AFB library director to discuss future ILL options on 3/5.

## ILLNET INTERLIBRARY LOAN

**Goal: Increase familiarity and compliance with the ILLINET Interlibrary Loan Code (ILL Code).**

- Featured instructions on how to properly deny interlibrary loan items. For example, if something is too damaged to transit, members were given instruction on how to deny so the request will move to the next available item.
- SHARE members also received information on how to search and request ILL items outside the SHARE database.

## E-RESOURCES

**Goal: Increase familiarity with and utilization of eResources.**

- Offered demos for RBdigital products.
- The eResource Committee had a robust discussion on how to better train member library staff and better market digital services to their communities.
- Cloud library members will be given the opportunity to increase their contributions to the shared collection budget in FY2020. The fee scale will remain the same in FY2020 but will likely change in FY2021.

## CONTINUING EDUCATION

**Goal: Increased continuing education opportunities as allowed by ISL directive.**

- On March 29<sup>th</sup>, IHLS facilitated the senior project of Jamie Wratchford, the Assistant Director of the Morrison Talbott Library in Waterloo. The program, Intellectual Freedom and Professional Ethics in Libraries, attracted more than 75 attendees. The daylong event featured Jamie LaRue speaking on Intellectual Freedom. A significant number of IHLS staff participated in the daylong event.
- Anna Yackle, Membership Coordinator, has begun work on a formalized plan for Trustee Training.