Y2017 Staff Activities Report – October 2016 Activities
Demonstrating our commitment to the IHLS Plan of Service

This monthly report documents how staff activities are tied to the IHLS Plan of Service. At the beginning of each section is a narrative for each service, followed by the priorities and goals of each department. The number(s) in parenthesis behind an activity reflects which goal(s) it is tied to. Additional activities are those which go above and beyond reaching our Plan of Service goals and demonstrate the hard work and dedication of the IHLS staff.

Administrative Service:

Implementation of three-year plan to improve member services. Assessment and modification of communication paths with all IHLS stakeholders. Continued training and implementation of additional modules in the Abila software.

Administrative Service Priorities

COMMUNICATIONS
Goal:
1. **Goal: Effective and efficient communication with IHLS stakeholders**

Activities tied to goals:
- Reviewed news feeds for information of interest to IHLS members such as grants, upcoming continuing education opportunities, and member news to be included in the IHLS newsletter and shared on Facebook.
- New grant opportunities were added to the Grants page on the IHLS website and shared through the IHLS newsletter.
- New discounts were added to the Vendor Discount page on the IHLS website and shared through the IHLS newsletter.
- The IHLS newsletter, Moving Forward Together, was sent each week to over 2,100 subscribers.
- Created and sent the monthly newsletter, IHLS Staff Connection to staff.

Additional activities:
Staff participated in various activities in support of the board's advocacy initiative:
- A meeting of the Priorities Team on October 7th in Mascoutah to begin Reverse Strategic Planning.
- A meeting of the select staff members in Effingham on October 12th to discuss the rebranding of IHLS.
- A meeting of the Priorities Team and Managers on October 24th to continue the Reverse Strategic Planning Process.

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HUMAN RESOURCES/FINANCE
Goals:
1. **Support and development of IHLS staff**

2. **On time delivery of financial reports**
3. **Continued implementation of Abila financial management software**
4. **Effective and efficient communication with IHLS staff**
5. **Assist Operations department**
6. **Support resource sharing**

Activities tied to goals:
- Conducted three new hire orientations (4)
- Survey IHLS staff re enrollment for supplemental life insurance and interest in FSA Account. (4)
- Prepared September 2016 Bill Payment, Credit Card Transaction, Statement of Revenues and Expenditures, and Balance Sheet Reports for IHLS Finance Committee and Board of Directors. (2)
- Analyzed, reviewed, and worked with Operations Department to determine revised ILDS Project cost and staffing requirements. (5)
- Prepared first quarter FY2017 Special Revenue Grant Reports for submission to ISL. (2)
- Filed CY2016 third quarter payroll tax reports. (2)

Additional activities:
- Prepared and processed two payrolls.
- Generated and mailed 279 accounts receivable invoices.
- Received and posted 207 accounts receivable cash receipts checks.
- Received and entered 174 accounts payable invoices.
- Disbursed 127 accounts payable checks.

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IT
Goal:
1. **To provide the IT support necessary for IHLS to function efficiently**

Activities tied to goal:
- Zoom video conferencing fully setup to support 10 simultaneous H.323 (Polycom) sites and up to 50 total participants from a variety of personal computing devices (phones, computers, tablets...)
- Research complete on replacement firewalls for IHLS offices. New firewall is scheduled for an onsite demo on Nov 10. The firewall will be evaluated and if it works as expected we will consider it for all IHLS sites.
- A defect was discovered in a Microsoft patch that was affecting Polaris users staying connected to the servers. We rolled back the patch and we are waiting for Microsoft to resolve the issue before moving forward with more patches on this issue.
- School library specific list created for discussion within that group of libraries.

Additional activities:
- Replacement cell phones for all delivery vans and operations departments. Old phones weren't holding a charge and new phones are $.99/ea.

BOARD SUPPORT

Goals:

1. **Refine process for future board and committee meetings**
2. **100% state and federal compliance for IHLS/Board and appropriate IHLS staff**

Activities tied to goals:

- Provided board members with monthly meeting calendar

Additional activities:

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RECORD RETENTION

Goal:

1. **Retain and purge materials on an approved schedule**

Activities tied to goal:

- Researched storage options for files in Du Quoin building
- Contacted City of Edwardsville to find out restrictions

Additional activities:

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GRANT DOCUMENT TRACKING

Goal:

1. **Maintain and track all grant documentation and due dates**

Activities tied to goal:

- Completed quarterly reports for CMC and TMQ (1)

Additional activities:

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NETWORKING

Goal:

1. **To make IHLS an active partner in statewide and national initiatives that support enhanced library service**

Activities tied to goal:

- Hosted the ILead Debrief conference at the Edwardsville location
- Six staff members attended the Illinois Library Association Conference (Oct. 17-20)

Additional activities:

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LONG RANGE PLANNING

Goal:

1. **Three-year plan**

Activities tied to goal:

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Additional activities:

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Bibliographic Access:

As a cornerstone of resource sharing, Bibliographic Access services in FY17 will promote:

- *The availability of bibliographic support in a variety of methods including cataloging and database maintenance for the SHARE Consortium, cataloging training for SHARE members and statewide support through the Cataloging Maintenance Center.*
- *Access to digitalized information found in Illinois libraries and at IDA by providing information on formation and content of Metadata.*

Bibliographic Service Priorities

CATALOGING SERVICE FOR SHARE

Goals:

1. **To provide cataloging service for SHARE member libraries**
2. **To increase usability of the SHARE database by cleaning up duplicate records and incorrect cataloging and maintaining authority files in the SHARE database**

Activities tied to goals:

- Staff cataloged 842 items for SHARE member libraries. (1)
- Staff created 99 on order bibs for SHARE member libraries (1)
- Staff cataloged 717 items for new member libraries joining SHARE (1)
- Staff merged 532 bibliographic records, clean up/corrected 2160 bibliographic records, and corrected/cleanup 99 item records. (2)

Additional activities:

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CATALOG TRAINING

Goal:

1. **Goal: To increase the understanding and skills in bibliographic services and cataloging for members libraries and to stay current with national, state and local policies such as RDA, AACR2, OCLC and Library of Congress**

Activities tied to goal:

- Staff conducted 5 cataloging classes, hosted 1 Cataloger's Training session and one Chat session and held 3 Catalogers Days. (1)

Additional activities:

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CATALOGING MAINTENANCE CENTER

Goals:

1. **To provide cataloging and bibliographic services for the libraries in RAILS and IHLS in order to increase access and encourage resource sharing of information resources found in Illinois libraries**
2. **To support access to digitalized information found in Illinois libraries and at IDA by providing information on formation and content of metadata**

Activities:

- Staff continue to work with digitized data, transcribing data for Illinois State Archives, Southern Illinois University and Meadville Theological Seminary. (2)
- CMC staff cataloged 137 items for libraries in Illinois. (1)
- CMC staff created 1 NACO name authority record for improved user access. (1)

Additional activities:

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TMQ (THE MARC OF QUALITY)

Goals:

1. **Improve the quality of the SHARE database, thus improving user access to information resources**
2. **OCLC WorldCat holdings for member libraries are updated in a timely manner, which should increase resource sharing**

Activities tied to goals:

- Holdings were added for SHARE member libraries. (2)
- Staff reviewed the reports and provided basic clean up. (1)

Additional activities:

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Resource Sharing:

- *Highlight the focus on full participation in resource sharing as required by the revised system standards.*
- *Make a system-wide effort to use multiple channels of communications and formats of continuing education to ensure libraries are familiar with the revised ILLINET Interlibrary Loan Code.*
- *Continue the development of our LLSAP through the promotion the advantages of membership in SHARE. Of particular focus will be a concerted effort to raise awareness and participation from any ILLINET member, regardless of library system affiliation. Additionally, the work to bring transitional members to the point of going live on SHARE will involve a significant amount of staff time and attention.*
- *Continue to enhance and improve services for existing LLSAP members through attention to current practices and policies and being alert to opportunities for improvement that might present themselves during the fiscal year.*
- *Research and review E-Resources that would be beneficial to our stakeholders. E-Resources that are adopted for system use will be promoted throughout the system with the expectation of increased participation.*

Resource Sharing Priorities

LLSAP (SHARE)
Goal:
1. **Provide an innovative resource discovery, sharing and delivery system.**

Activities tied to goal:
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Additional activities:
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LLSAP DEVELOPMENT
Goal:
1. **Increase members participating in SHARE**

Activities tied to goal:
- Continued working with 27 transitional member libraries working on barcoding and training to go live on Polaris (1)

Additional activities:
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ILLINET INTERLIBRARY LOAN CODE
Goal:
1. **Increase familiarity and compliance with the ILLNET Interlibrary Loan Code**

Activities tied to goal:
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Additional activities:
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E-RESOURCES
Goal:
1. **Increase familiarity with and utilization of eResources**
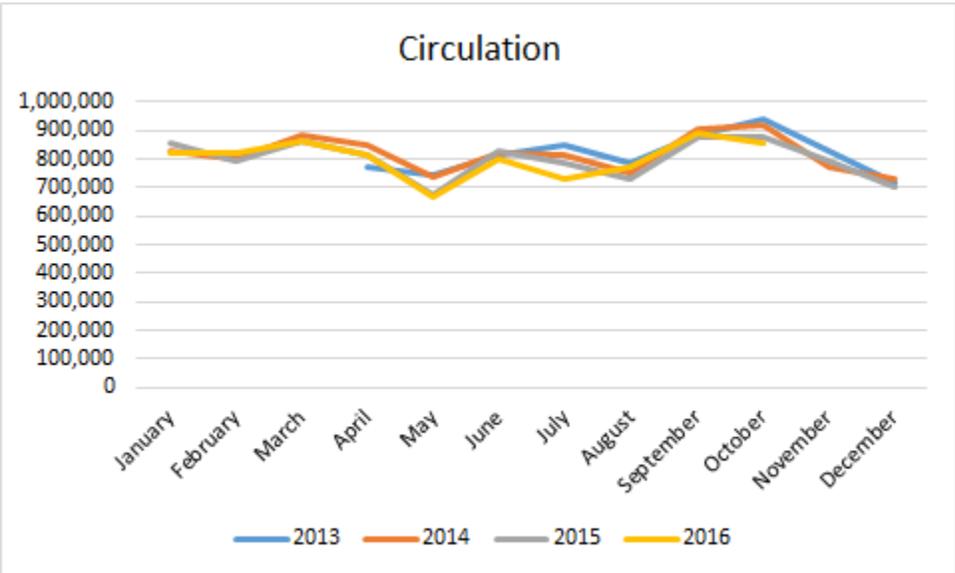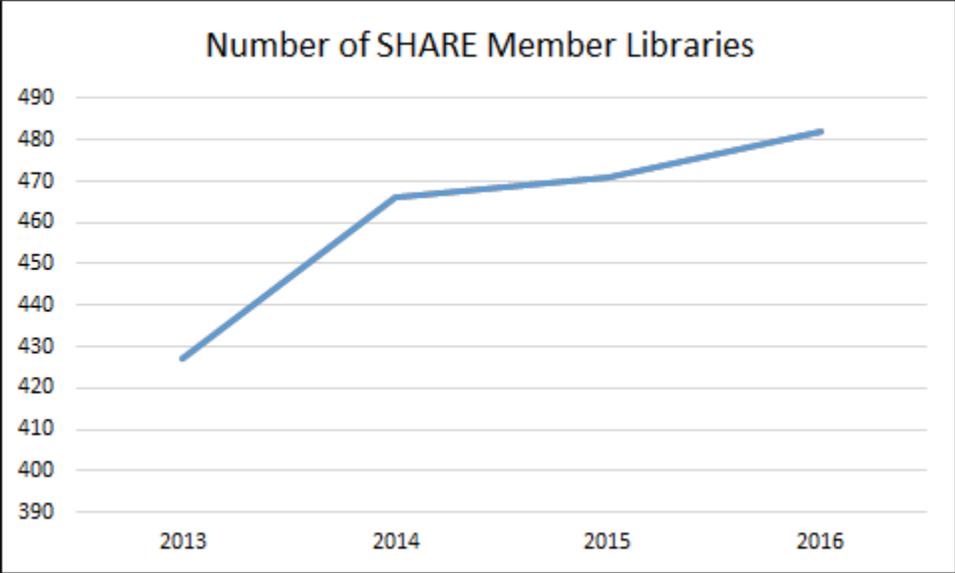
Activities tied to goal:
- The IHLS Zinio for Libraries – School Edition shared collection launched on October 18, 2016. Currently, 15 school libraries are participating in this group purchase. 208 eMagazines were borrowed from this collection in the month of October. (1)
- One Cloud Library staff training and one patron event were provided for Sidell District Library on October 13 with a total of 3 attendees.
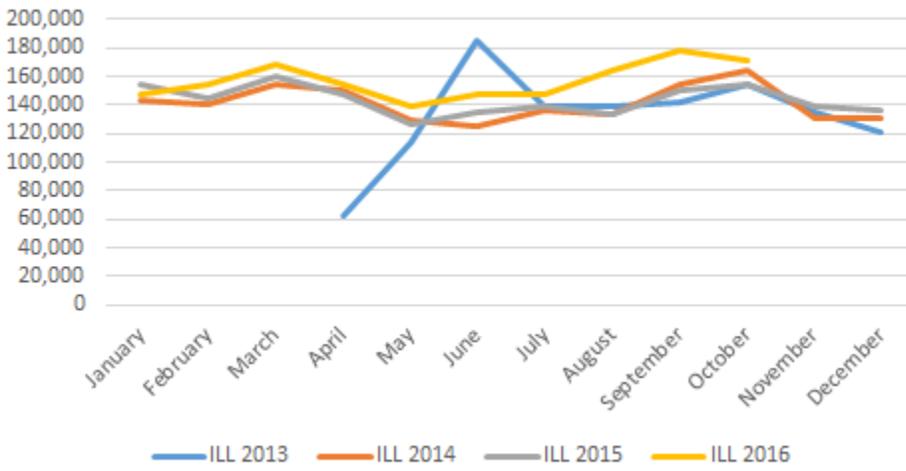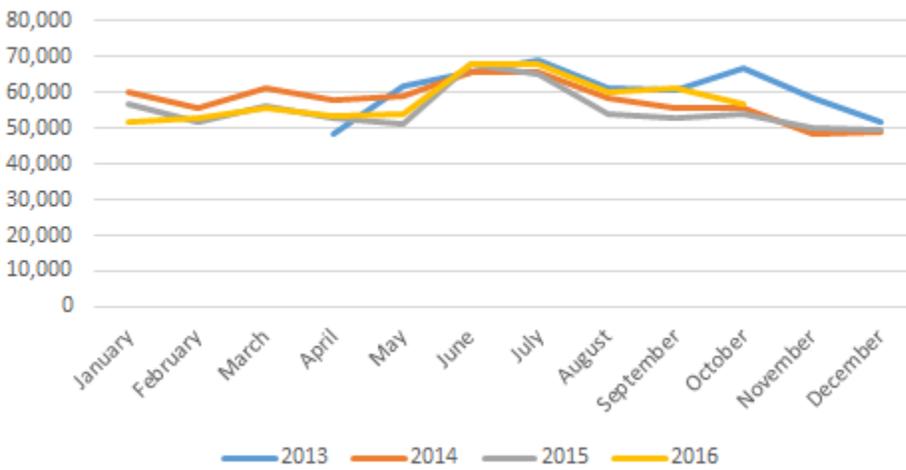
Additional activities:
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SHARE Statistics

	Circulation	ILL	Reciprocal Borrowing	PAC Searches	Holdings	Bibs	Patrons
July - 16	732,014	147,853	67,944	1,022,861	9,240,186	1,843,617	817,164
Aug - 16	770,064	164,585	60,333	999,263	9,270,779	1,828,926	820,638
Sept - 16	893,619	177,648	61,127	919,900	9,294,272	1,842,936	812,870
Oct - 16	856,288	171,240	56,668	881,243	9,309,983	1,845,810	814,219
Nov - 16							
Dec - 16							
Jan - 17							
Feb - 17							
Mar - 17							
Apr - 17							
May - 17							
June – 17							

Number of SHARE Member Libraries

Circulation

Interlibrary Loan

Legend: ILL 2013, ILL 2014, ILL 2015, ILL 2016

Reciprocal Borrowing

Legend: 2013, 2014, 2015, 2016

PAC Searches

Legend: 2013, 2014, 2015, 2016

Holdings

Legend: 2013, 2014, 2015, 2016

Bibliographic Records

Legend: 2013, 2014, 2015, 2016

Patrons

Legend: 2013, 2014, 2015, 2016

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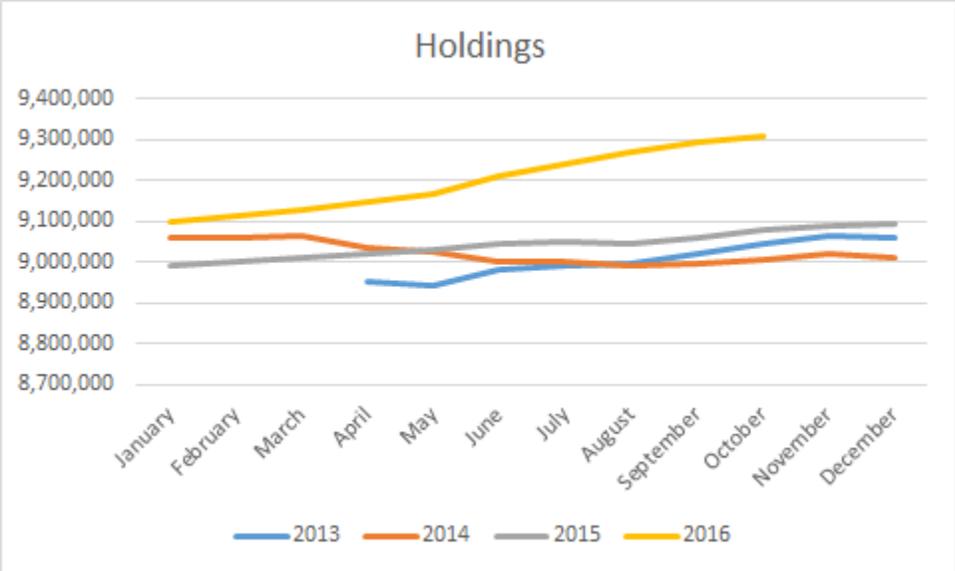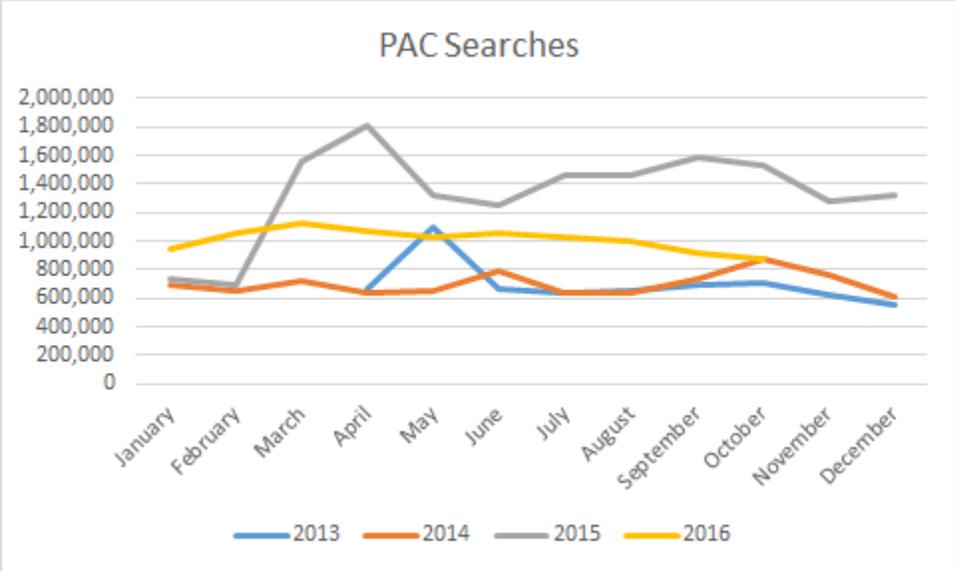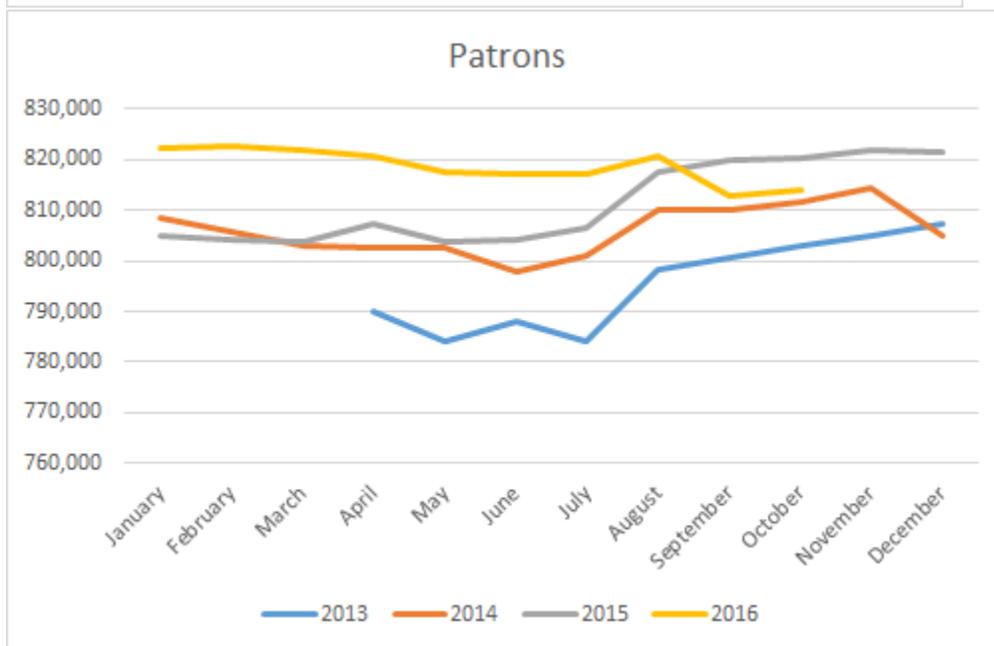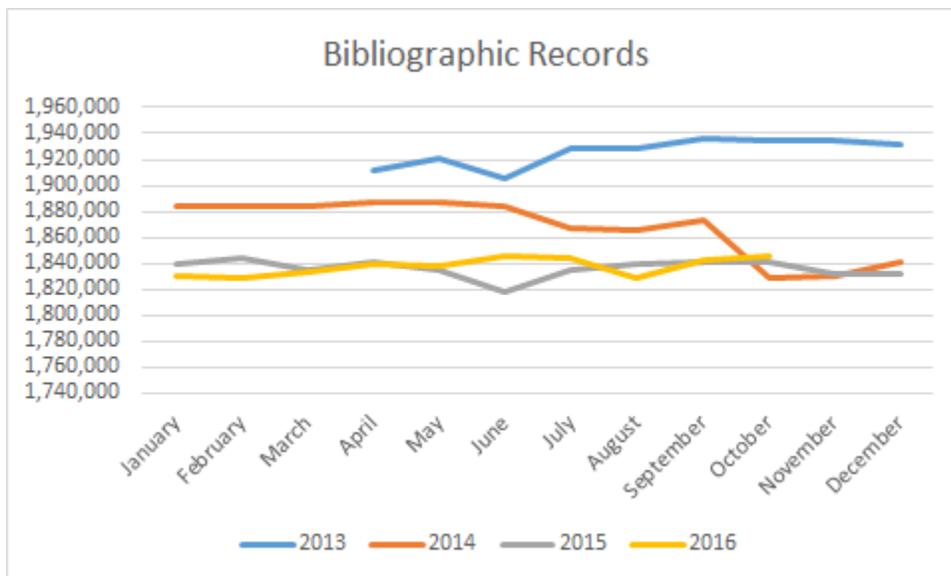
Consulting and CE:

The value of consulting and continuing education opportunities have been voiced loud and clear by our members for the past five years. As these services begin to grow back, efforts will be designed to:

- *Hit the target of site visits to 20% of our member libraries (102 agencies). Agencies would include public libraries with new directors, struggling school districts and responses to specific invitations from library agencies who would like assistance with understanding and complying with State Statutes and Administrative Rules as well as system bylaws, policies and services.*
- *Support training on the revisions of the ILLINET Interlibrary Loan Code.*

- *Continue the development on an annual IHLS Member Day.*
- *Craft no-cost or cost-recovery continuing education opportunities for our members that comply with ISL directives.*
- *Encourage member awareness of and participation in regional, statewide and national professional development opportunities as they present themselves.*

Consulting and CE Priorities

CONSULTING SERVICES

Goal:
1. **To be responsive to the expressed needs of member libraries for consulting services**

Activities tied to goal:
- Assisted Case-Halstead Public Library to provide Library Law Day with Phil Lenzini (1)
- Provided monthly IHLS Directors' Chat (1)
- Attended Mounds Public Library Board Meeting on October 11 (1)
- Three staff members attended the Brighton Public Library District Open House (Oct. 26th) (1)

Additional activities:
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CONTINUING EDUCATION

Goal:
1. **To provide continuing education opportunities as allowed by ISL directive**

Activities tied to goal:
- SHARE staff conducted 19 classes related to use of Polaris (1)

Additional activities:
- Began planning how to increase use of electronic methods of communication for training (1)

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DELIVERY:
The focus of delivery services offered by the Illinois Heartland Library System in FY17 these services will include:
- *Compliance with the recommendations of the Illinois Statewide Delivery Committee.*
- *The availability of 5 day a week delivery using zoned routes and SHARE software.*
- *A revised web presence.*
- *A help desk designed to provide responsive customer service.*
- *Efficient tracking of delivery statistics through the in-house creation of an app that will allow data to be input throughout the day and uploaded on a regular basis.*
- *Please see the Delivery Revenue table at the end of this document.*

Delivery Priorities

Goal:
1. **Efficient provision of delivery services designed to support resource sharing among IHLS members**
2. **Provision of accurate information and educational tools to support delivery**
3. **Accurate member library data in L2**

Activities tied to goals:
- Receiving feedback from member libraries as to the effectiveness of the implementation of SMART (Shared Materials Are Received Timely) or functional 5 day a week service. Some tweaking of how we are alerted is being discussed. (1)
- Met with ISL/CARLI/RAILS for standardizing all statistics that are kept throughout these systems. (2)
- Met with ISL/CARLI/RAILS for clarification of how the data needs to be input into L2. All IHLS managers attended as well to address any questions they may have about inputting the data. We need to all be on the same page. (3)

Additional activities:
- Champaign took over as the exchange hub for ILDS items from RAILS, November 14. Space is still being tweaked for optimum exchange.
- Attended Members Matter meeting on November 1 to share Delivery Updates and to gather feedback.
- Met with the Reaching Forward South Committee on November 1 to help with the planning of the event.
- Delivery Count Week was October 10 – 14. IHLS delivered 50,421 items during that week.

Delivery Statistics

October 2016	IHLS LIBRARIES Delivery	IHLS HUB to HUB Delivery	ILDS - CARLI Delivery
Carbondale	62,060	15,855	1,247
Champaign	234,792	29,568	2,728
Edwardsville	253,463	20,747	3,795