

FY2017 Staff Activities Report – January 2017 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:

- Held Members Matter meeting in person at the IHLS Champaign office along with participants using Zoom and several VTEL sites.
- Meetings were held to discuss the rebranding project.
- Sought and chose a new design for a new IHLS logo using the CrowdSpring website.
- 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.
- Nine (9) grant opportunities were added to the Grants page on the IHLS website and shared through the IHLS newsletter.
- Two (2) discounts were added to the Vendor Discount page on the IHLS website and shared through the IHLS newsletter.
- The IHLS newsletter, Moving Forward Together, sent on regular basis to over 2,100 subscribers.
- Created and sent the monthly newsletter, IHLS Staff Connection, to staff.

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:

- Registered (12) staff members for Fred Pryor training membership. (1)
- Prepared and filed electronically W-2s for 126 employees. (2)
- Calculated and filed electronically 1095-Cs for 50 employees. (2)
- Prepared and filed electronically 1099s for 33 vendors. (2)
- Compiled financial data for special revenue grant second quarter reports submitted to ISL. (2)
- Prepared December 2016 Bill Payment, Credit Card Transaction, Statement of Revenues and Expenditures, and Balance Sheet Reports for IHLS Finance Committee and Board of Directors. (2)

Additional activities:

- Prepared and processed two payrolls.
- Generated and mailed 249 accounts receivable invoices.
- Received and posted 155 accounts receivable cash receipts checks.
- Received and entered 172 accounts payable invoices.
- Disbursed 122 accounts payable checks totaling \$197,719.74.

IT

Goal:

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

Activities tied to goal:

- Completed final programming on iPad Delivery Project. First live use is scheduled for Feb 1, 2017
- Installed new firewalls at Edwardsville and Carbondale. Units for Champaign office and SHARE Co-Location facility scheduled for early February.
- Assisted with setup for RFID (radio-frequency identification) implementation at Decatur Public Library
- Hosted a successful SHARE semi-annual meeting using Zoom technology.
- Began the upgrade process of a server for libraries in southern Illinois using the SAM software from Comprise technologies.
- New SHARE training website is live using the free software Moodle.

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:

- Sent committee meeting calendar to board members (1)

RECORD RETENTION

Goal:

1. Retain and purge materials on an approved schedule

Activities tied to goal:

- Created timeline to purge surplus items and offer to member libraries

GRANT DOCUMENT TRACKING

Goal:

1. Maintain and track all grant documentation and due dates

Activities tied to goal:

- Submitted quarterly reports for CMC (Cataloging Maintenance Center) & TMQ (The MARC of Quality) to the Illinois State Library (ISL)

NETWORKING

Goal:

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

Activities tied to goal:

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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 747 items for SHARE member libraries. (1)
- Staff imported 204 \$3 bibs for SHARE member libraries. (1)
- Staff created 105 on order bibs for SHARE member libraries (1)
- Staff cataloged 587 items for new member libraries joining SHARE (1)
- Staff merged 341 bibliographic records, clean up/corrected 2053 bibliographic records, and corrected/cleanup 503 item records. (2)

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:

- SHARE bibliographic services staff taught 7 cataloging related classes and hosted one Cataloger's Training Session. (1)

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 Illinois Digital Archives to finish metadata for the Southern Illinois University Edwardsville and other libraries. (2)
- CMC staff cataloged 195 items for libraries in Illinois. (1)

- CMC staff created 4 NACO name authority records for improved user access. (1)

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 to OCLC for SHARE members. (2)

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:

- SHARE staff have started reviewing documentation for upcoming upgrades to Polaris.

LLSAP DEVELOPMENT

Goal:

1. Increase members participating in SHARE

Activities tied to goal:

- IHLS and SHARE staff sent letters about the Wal-Mart grant to 15 public libraries that meet the criteria of IPLAR (Illinois Public Library Annual Report) reported income less than \$40,000 and population less than 2,000.
- IHLS and SHARE staff met with three of those public libraries, to discuss using Wal-Mart grant funds to join SHARE. More meetings will be held in the coming months.

ILLINET INTERLIBRARY LOAN CODE

Goal:

1. Increase familiarity and compliance with the ILLNET Interlibrary Loan Code

Activities tied to goal:

Additional activities:

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E-RESOURCES

Goal:

1. Increase familiarity with and utilization of eResources

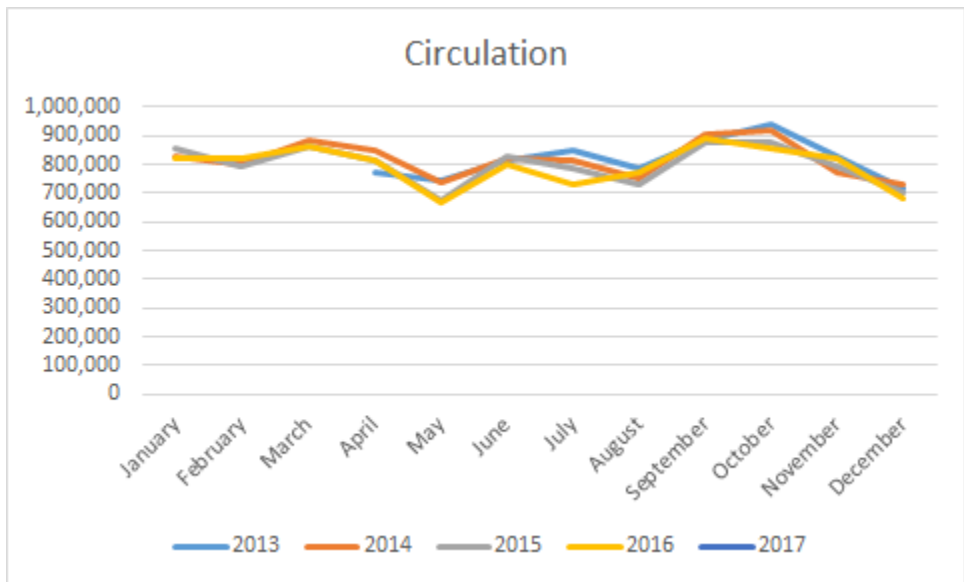
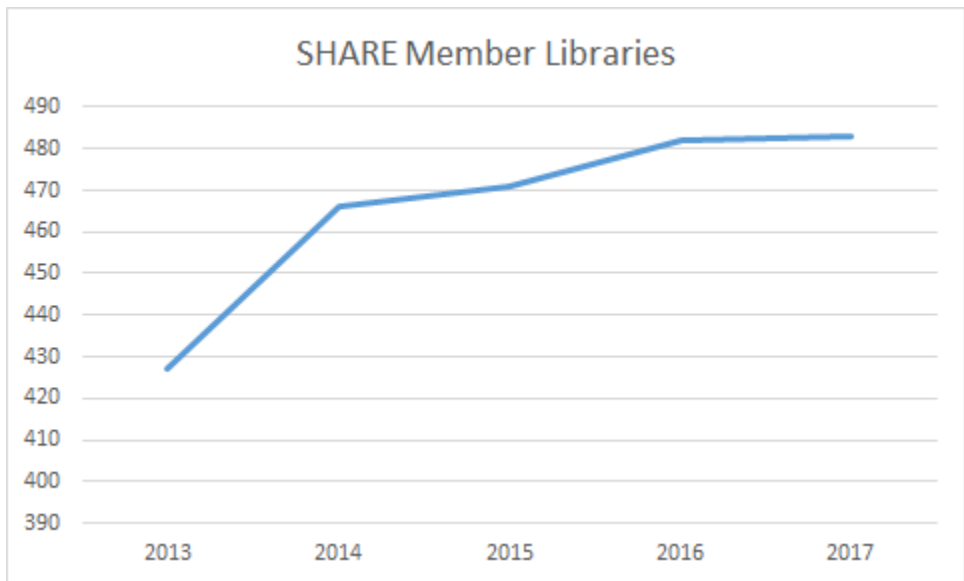
Activities tied to goal:

- One school library started participation in the Cloud Library January 1st, bringing the total number of library agencies participating to 198 (156 public, 35 school, 5 academic, and 3 special). (1)
- One school library started participation in the Zinio School Editions group bringing the number of participants up to 13 school libraries. (1)
- Two public libraries joined the Zinio Publics group starting January 1. There are currently 37 libraries participating in that group purchase. (1)
- Two updated Cloud Library online courses were added to the new SHARE Training site this month. (1) Preparations were made to create MyMediaMall (Overdrive) and Zinio courses. (1)

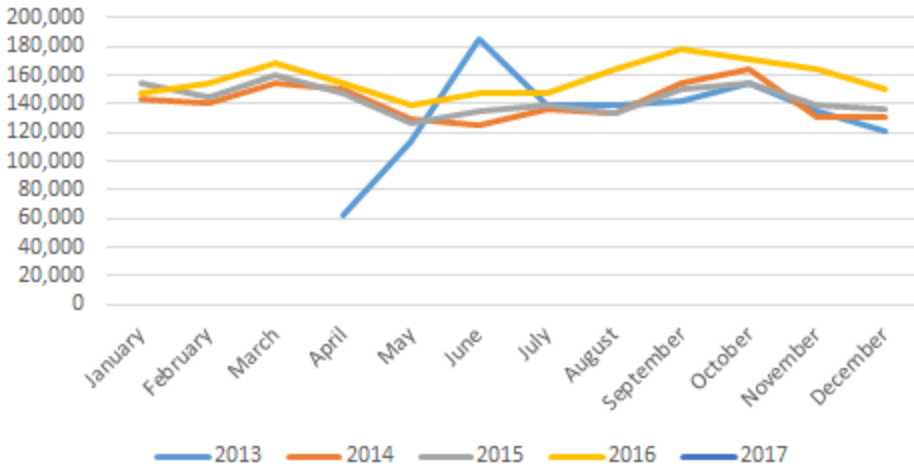
SHARE Statistics

	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							
Oct - 16							

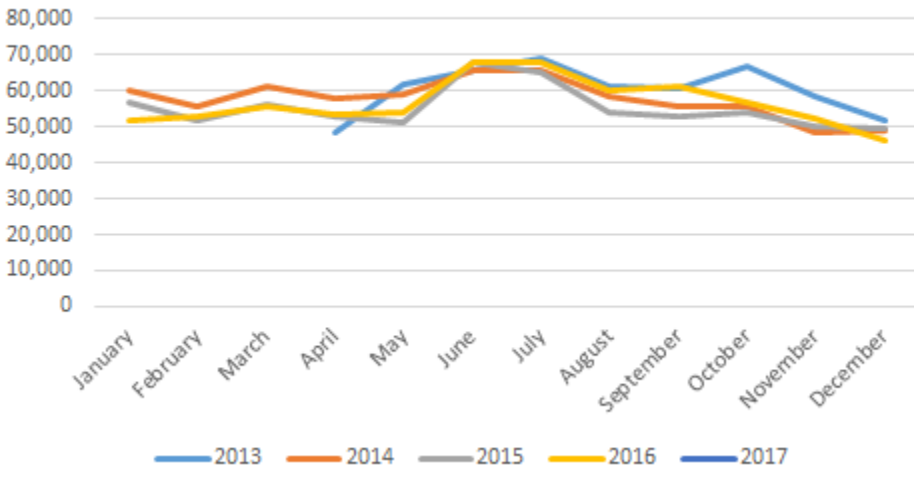
Nov - 16							
Dec - 16							
Jan - 17	862,751	186,851	52,758	897,795	9,330,945	1,849,837	816,146
Feb - 17							
Mar - 17							
Apr - 17							
May - 17							
June - 17							

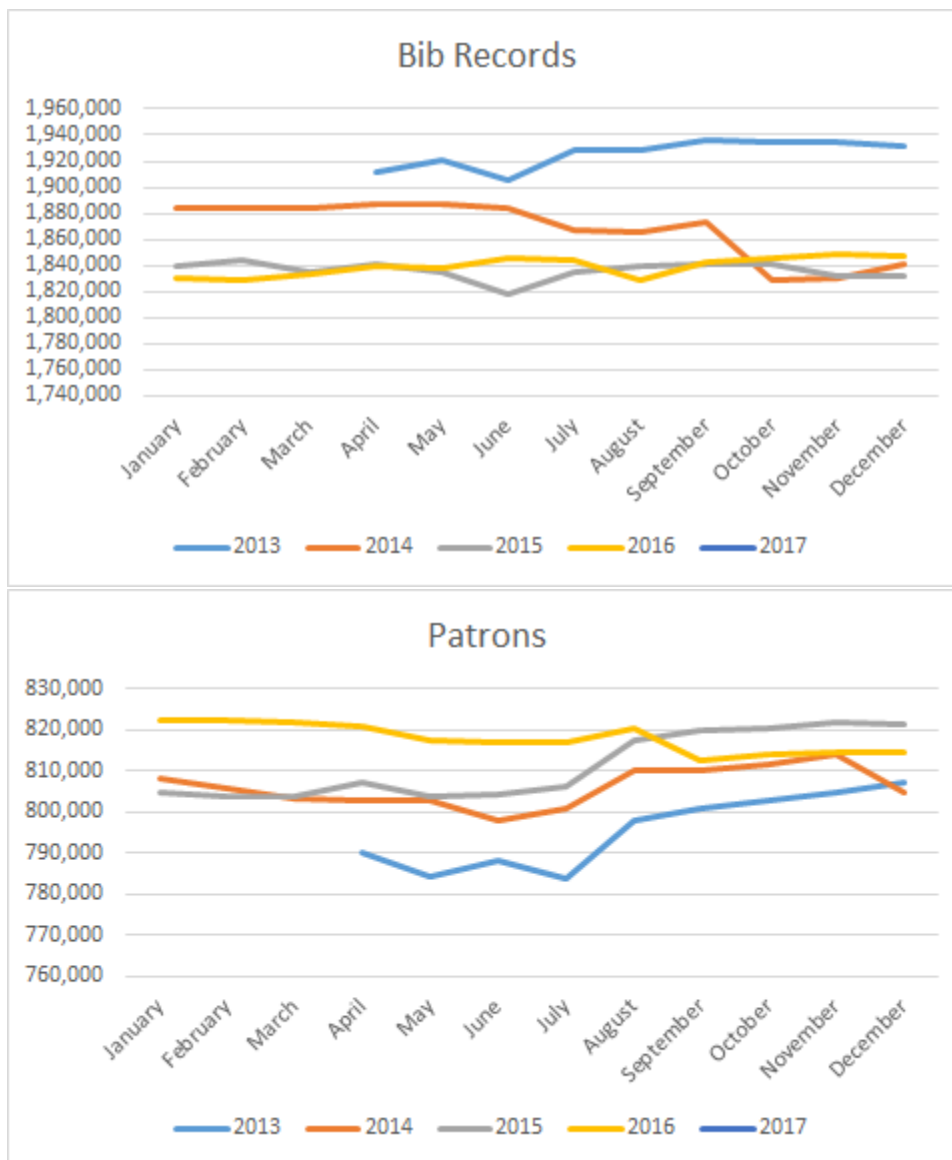


Interlibrary Loan



Reciprocal Borrowing





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:

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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 provided 10 Polaris classes in January for member library staff.**
- **SHARE & IT staff spent a significant portion of their work time developing Polaris video recorded classes that will be posted on the SHARE website.**
- **The new training portion of the SHARE website was introduced in mid-January.**

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

DELIVERY SERVICE

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:

- iPads are now on the routes with the drivers. The data that the drivers input will now be easily accessible and ready for deriving reports from the data. (2)
- Completed required L2 (LibraryLearning) delivery data for all IHLS libraries. Brian Smith (our Reaching Across Illinois Library System colleague) will be uploading it into the L2 database. (3)

Delivery Statistics

January 2016	IHLS LIBRARIES Delivery	IHLS HUB to HUB Delivery	ILDS - CARLI Delivery
Carbondale	59,350	27,890	1,282
Champaign	253,162	60,140	3,939
Edwardsville	262,794	62,160	3,710