



## Illinois Heartland Library System

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TO: IHLS Board of Directors  
FROM: Leslie Bednar  
DATE: May 18, 2022  
RE: FY2023 Draft Operational Plan

The final draft of the FY2023 Operational Plan in your packet has had a few adjustments since the version we shared in April. The most important is the inclusion of Section D: Resource Sharing. This section was inadvertently left out of the plan we provided in April. We apologize for the inconvenience. Additional changes are listed here:

- Combined Facilities activities in the Delivery section with the same in the Administration section.
- Removed reference to ergonomic specialist.
- Moved these member-focused tasks from the Resource Sharing (SHARE) section to the Membership section: activities related to the Interlibrary Loan Traffic Survey, non-resident card data, and the expansion of the non-resident card resources on the IHLS' website.
- Removed the implementation of the new website design from the Administration/IT section.

The operational plan is approved by the board and the Illinois State Library. The Cataloging Maintenance Center, OCLC, and Trustee Training operational plans are approved by the Illinois State Library.

At their May meeting, the Policy and Membership Committee voted to move the FY2023 Draft Operational Plan to the Executive Committee for consideration and approval. That was followed by unanimous approval by the Executive Committee at their May 16 meeting.

Thank you for your feedback and thoughtfulness.

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## A. Administration

Illinois Heartland Library System (IHLS) celebrates its decade of service to libraries in central and southern Illinois and looks to a future of continued collaboration and partnership in the library space. Centralized administrative services allow us to provide cost effective and innovative solutions to member needs. The focus of our administrative team members in FY2023 includes:

- Member communication focused on advocacy for member libraries, equity, diversity and inclusion initiatives, and organization-wide consulting support for member libraries
- Support for IHLS Board of Directors through training and marketing of board membership
- Accurate financial forecasting, strident adherence to accounting principles, and continued utilization of OpenGov database for enhanced reporting and transparency
- Further development and expansion of new IHLS website, expanded utilization of Customer Relationship Management database, and support of electronic communication with Zoom and Teams.
- Staff development and understanding of how employee efforts connect or align with the organization’s purpose through improved annual evaluation process, planned employee development trainings to enhance a culture of learning, and cultivating the employer-employee relationship.

### Communications

**Goal: Communicate effectively and efficiently with IHLS stakeholders.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Inform stakeholders on what is happening at the system, statewide, and national levels.	<ul style="list-style-type: none"> <li>- Prioritize and share important library-related news from the system, state, and national levels</li> <li>- Communicate with members where they are, including conferences, virtual events, and library visits</li> </ul>	23 ILAC 3030.215 a) 3) G)
Continually improve communication with IHLS stakeholders.	<ul style="list-style-type: none"> <li>- Annually review and update the marketing communication plan</li> <li>- Continually analyze and optimize website user experience, user interface, and content</li> <li>- Improve email list hygiene by working with IT to automate the updating of email addresses using the recently developed Customer Relationship Management software</li> <li>- Improve email list hygiene by working with IT to automate the updating of email addresses using the recently developed Customer Relationship Management software</li> </ul>	23 ILAC 3030.215 a) 3) G)  23 ILAC 3030.215 d) 1)

	<ul style="list-style-type: none"> <li>- Partner with organizations such as Reaching Across Illinois Library System, Illinois Library Association, and Association for Illinois School Library Educators to cross-promote events or collaborate on initiatives</li> <li>- Strategically utilize IHLS social media as a communication tool</li> </ul>	
Prioritize communication and promotion of initiatives/events that support the mission of IHLS and the mission and goals of IHLS department leadership.	<ul style="list-style-type: none"> <li>- Prioritize member communication, especially: <ul style="list-style-type: none"> <li>• Pandemic and post-pandemic services</li> <li>• Equity, diversity, inclusion, and accessibility initiatives</li> <li>• Value of IHLS</li> </ul> </li> <li>- Develop tools that support both inter-departmental goals and public relations goals</li> <li>- Collaborate with Cataloging Maintenance Center and IT staff on strategically developing a marketing presence</li> <li>- Collaborate with SHARE staff on increasing SHARE's marketing presence</li> </ul>	23 ILAC 3030.215 a) 3) G)
Communicate in compliance with industry legal standards.	<ul style="list-style-type: none"> <li>- Seek annual communication law training for communication staff</li> <li>- Finalize, implement, and annually review a professional-use social media policy</li> <li>- Develop, implement, and annually review a data and privacy policy</li> </ul>	23 ILAC 3030.215 a) 3) G)
Continue to seek member feedback.	<ul style="list-style-type: none"> <li>- Seek input on library needs during Directors' Chats, local library networking events, trustee networking events, and other events</li> <li>- Conduct a triennial all-member survey</li> </ul>	23 ILAC 3030.215 a) 2)

**Goal: Provide information and assistance to member libraries of all types through consulting and continuing education.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Offer internal consulting services.	<ul style="list-style-type: none"> <li>- Spearhead the development of an organization-wide consulting program with IHLS professional staff. Promote the program to members</li> <li>- Provide marketing and communication staff participation in the IHLS consulting program</li> </ul>	23 ILAC 3030.215 d) 1)

Educate and support member libraries as they promote their agencies and face challenges.	<ul style="list-style-type: none"> <li>- Evaluate marketing/communication staff availability for speaking at conferences</li> <li>- Collaborate with IHLS librarians and professional experts to develop and promote resource guides for issues in librarianship</li> <li>- Create an online depository of material for members to utilize in their efforts to seek funding, sponsors, partnerships, and grants</li> </ul>	23 ILAC 3030.215 a) 3) D)
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**Goal: Advocate for IHLS.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Increase visibility in our service area.	<ul style="list-style-type: none"> <li>- Finalize, implement, and annually review and update the IHLS advocacy plan</li> <li>- Generate brand visibility for IHLS while promoting libraries</li> <li>- Identify and support opportunities for one-on-one and one-to-group advocacy</li> </ul>	23 ILAC 3030.215 a) 3) D)

**Goal: Advocate for member libraries.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Promote libraries to the public.	<ul style="list-style-type: none"> <li>- Finalize, implement, and annually review and update the IHLS advocacy plan</li> <li>- Support Illinois Library Association advocacy initiatives</li> <li>- Seek sponsorship opportunities on behalf of the libraries of central and southern Illinois</li> <li>- Lean into video-based messaging</li> <li>- Identify and support additional opportunities for library advocacy</li> </ul>	23 ILAC 3030.215 a) 3) D)
Help IHLS libraries advocate for themselves.	<ul style="list-style-type: none"> <li>- Support Illinois Library Association advocacy initiatives</li> <li>- Identify pressing library issues and develop resource guides and tools to address them</li> <li>- Develop a resource guide for how to tell a library's story</li> </ul>	23 ILAC 3030.215 a) 3) D)

**Goal: Facilitate effective internal communication to enable better member service.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Continually improve communication with IHLS employees.	<ul style="list-style-type: none"><li>- Finalize, implement, and annually review and update the IHLS internal communication plan</li><li>- Work with the Communication Team to implement internal communication procedures</li><li>- Collaborate with IT, HR, and other stakeholders to develop strategies for more effective use of the IHLS intranet</li></ul>	23 ILAC 3030.215 a) 5)



## Board Support

**Goal: Provide support for IHLS board members.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Streamline and improve all aspects of board support.	<ul style="list-style-type: none"> <li>- Provide support for monthly meetings of the board and committees using new and innovative methods</li> <li>- Join a professional board support organization for resources and guidance</li> </ul>	23 ILAC 3030.250 (outside of core standards)
Support communication between board and executive staff.	<ul style="list-style-type: none"> <li>- Provide meeting agenda and supporting documentation to the board and committees</li> </ul>	23 ILAC 3030.250 (outside of core standards)
Ensure compliance with library and local rules and regulations and federal or state laws.	<ul style="list-style-type: none"> <li>- Post meeting packets and approved meeting minutes within timeframes outlined in the Open Meetings Act</li> <li>- Confirm completion of the Open Meetings Act training</li> <li>- Confirm completion of the Statement of Economic Interest</li> <li>- Coordinate and submit the annual System Area &amp; Per Capita Grant application</li> <li>- Coordinate and submit the Annual Report</li> </ul>	23 ILAC 3030.250 (outside of core standards)
Provide training for all board members.	<ul style="list-style-type: none"> <li>- Research options for a variety of board training programs</li> <li>- Provide training at least twice annually</li> </ul>	
Research and implement tools to improve board engagement.	<ul style="list-style-type: none"> <li>- Research and implement a meeting reminder system</li> </ul>	
Improve interest in board membership and increase the number of nominations during board elections.	<ul style="list-style-type: none"> <li>- Research motivation and incentives to board membership</li> <li>- Solicit video testimonials from outgoing board members</li> <li>- Assist the Nominating Committee with</li> </ul>	

	administrative activities	
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**Goal: Retain and purge materials on an approved schedule.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Ensure all data is handled in compliance with approved records retention policies.	<ul style="list-style-type: none"> <li>- Finalize identification of records eligible for destruction and submit for a certificate of destruction</li> <li>- Organize permanent records for easy reference</li> <li>- Monitor records on a regular basis and submit application for destruction when they become eligible</li> </ul>	23 ILAC 3030.265 (outside of core standards)

**FACILITIES**

**Goal: Provide a Safe Working Environment**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Continue to maintain the infrastructure of facilities.	<ul style="list-style-type: none"> <li>- Yearly check of HVAC, roof, fire extinguishers, etc.</li> <li>- Conduct Champaign parking lot repairs</li> <li>- Conduct tuckpointing on the Edwardsville building</li> <li>- Continue to provide turf management to Champaign and Edwardsville buildings</li> <li>- Continue to provide landscaping and mowing to Champaign and Edwardsville buildings</li> <li>- Finish remodel of second floor of Edwardsville building</li> <li>- Plan Edwardsville roof replacement</li> <li>- Schedule Champaign roof inspection</li> <li>- Complete Liebert HVAC replacement in Edwardsville server room</li> </ul>	23 ILAC 3030.250 i) (outside of core standards)

## 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.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Ensure that IHLS is sufficiently staffed to accomplish statutory priorities established by the Illinois State Library.	<ul style="list-style-type: none"> <li>- Maintain a diverse pool of candidates for staffing purposes</li> <li>- Utilize various job boards and media methods to seek high-quality candidates</li> <li>- Educate new staff on all IHLS policies and procedures upon hiring and communicate changes to existing staff</li> </ul>	23 ILAC 3030.215 a) 3)
Monitor performance evaluation process.	<ul style="list-style-type: none"> <li>- Redesign staff probationary period (90 days) evaluation</li> <li>- Implement a new annual evaluation process reflective of the IHLS work environment to include company vision, department goals, and individual goals</li> <li>- Establish training to ensure consistency with the performance rating of employees for fair and equitable treatment</li> </ul>	23 ILAC 3030.215 a) 3)
Support and develop IHLS staff.	<ul style="list-style-type: none"> <li>- Monitor staff educational training</li> <li>- Work in partnership with directors to ensure staff training sessions are beneficial to their department</li> <li>- Conduct quarterly staff training focused on personal development</li> <li>- Provide staff with resources and tools to help them advocate for the system and libraries</li> </ul>	23 ILAC 3030.215 a) 3)
Enhance organizational culture.	<ul style="list-style-type: none"> <li>- Create a recognition process to show appreciation to staff</li> <li>- Create a standard paid time off policy accrual that works for all staff</li> <li>- Evaluate Sick Bank Policy</li> <li>- Conduct annual Staff Day</li> <li>- Facilitate Staff Appreciation Day</li> <li>- Establish regular internal communications with staff</li> </ul>	23 ILAC 3030.215 a) 3)



**Goal: Explore opportunities to enhance human resources knowledge across member libraries.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Strengthen member libraries' general human resources knowledge.	-Investigate opportunities to educate member libraries in human resources administration - Enhance member libraries human resources management practices through consulting hours	23 ILAC 3030.215 d) 1)

## Accounting Operations

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

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Promote good stewardship of public funds.	<ul style="list-style-type: none"> <li>- Continually assess and optimize internal practices</li> <li>- Research and analyze insurance rates, coverages, and investment options for the organization</li> <li>- Perform cost analysis as needed for decision-making on special projects</li> </ul>	23 ILAC 3030.260 (outside core standards)
Complete and present practical financial reporting in a timely manner.	<ul style="list-style-type: none"> <li>- Present FY2022 Audited Financial Statements to IHLS Board and submit to the Illinois State Library at the end of September 2022</li> <li>- Record accurate financial transactions while monitoring account balances including, but not limited to: General, CMC, OCLC, and SHARE</li> <li>- Process payroll in-house biweekly and prepare payroll tax filings</li> <li>- Submit all special revenue grant reports to Illinois State Library 15 days after each fiscal quarter ends</li> <li>- Produce interim financial reports that show actual versus budget for IHLS Administration and Board of Directors, as well as in agreed-upon formats for select committees</li> <li>- Research appropriate industry forecasts and reflect those projected predictions as necessary in future fiscal year operating budgets</li> <li>- Draft FY2024 Operation Budgets timeline and budget draft for presentation to the board</li> <li>- Utilize the OpenGov software to enhance reporting to stakeholders and public to promote transparency</li> <li>- Arrange registration, transportation, lodging, and purchase supplies for staff and board</li> </ul>	23 ILAC 3030.260 (outside core standards)

**Goal: Provide member libraries with tools to enhance their financial literacy to encourage good stewardship of public funds.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Enhance member libraries' financial literacy.	<ul style="list-style-type: none"> <li>- Enhance member libraries financial management practices through consulting hours</li> </ul>	23 ILAC 3030.215 d) 1)

## Information Technology (IT)

**Goal: Provide the IT support necessary for IHLS and SHARE to function efficiently.**

Objectives	Planned Activities	System Standard
Provide support for core system services.	<ul style="list-style-type: none"> <li>- Provide software and technical assistance for SHARE services</li> <li>- Provide remote support through applicable software to IHLS staff at all office locations</li> <li>- Maintain internal and external web services for IHLS and SHARE</li> <li>- Track and repair problems reported by SHARE membership using SHARE helpdesk software</li> <li>- Support cloud telephone system with Microsoft Business Voice 365 and expand use of Intune to support employees working remotely and remote computers. <i>(Microsoft Intune is a cloud-based computer management system that allows management of devices not on your physical network. It is included with our Microsoft Phone license at no additional cost)</i></li> <li>- Support all internal file servers, cloud services, and other IT services vital to IHLS</li> <li>- Support communication electronically using technologies like Zoom and Teams</li> <li>- Provide more online and onsite opportunities to share information regarding technology issues</li> </ul>	23 ILAC 3030.215 a) 5)
Develop and research new technology and opportunities for IHLS and member libraries.	<ul style="list-style-type: none"> <li>- Work with other departments to expand and train on Pipedrive, our Customer Relationship Management (CRM) software solution. Including the ability to sync information from the Library Directory and Learning (L2) database with Pipedrive.</li> <li>- Network in the state and nationally to expand resource sharing</li> <li>- Promote broadband initiatives and how libraries can be leaders in their communities</li> </ul>	23 ILAC 3030.215 a) 5)
Enable the use of online communication methods for IHLS and members.	<ul style="list-style-type: none"> <li>- Evaluate current Zoom licensing and consider needs for upgrading to Zoom Rooms to move away from legacy videoconferencing technology like Polycom and the RAILS video bridge</li> </ul>	23 ILAC 3030.215 a) 5)

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Support Domain Name Services (DNS) for member libraries.	- Support member libraries with the purchase, renewal, and maintenance of Domain Name Services (DNS) using the Dreamhost account set up for non-profit libraries	23 ILAC 3030.215 a) 5)

## B. Bibliographic Access

As a cornerstone of resource sharing, Bibliographic Access allows library patrons and staff to find and request materials. Detailed and consistent descriptive metadata allows library patrons to easily retrieve the information and resources needed. The Ethics in Cataloging Group will continue meeting to discuss Diversity, Equity, & Inclusion (DEI) issues. The focus of bibliographic services provided by IHLS will include:

- Bibliographic support, including cataloging and database maintenance for the SHARE Consortium and cataloging training for SHARE members.
- The Cataloging Maintenance Center (CMC), which provides access to resources and special collections throughout the state, including digitized collections at Illinois Digital Archives (IDA). The CMC will provide information and training on bibliographic cataloging and metadata formation.

### Cataloging Services for SHARE

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

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Maintain exceptional database integrity to improve user access to information resources, with minimal duplicate bibliographic / authority records or "less than full level" bibliographic records.	<ul style="list-style-type: none"> <li>- Identify and merge duplicate bibliographic and authority records in the SHARE database</li> <li>- Replace substandard local records with full level bibliographic record</li> <li>- Import weekly authority record changes and correct as necessary</li> <li>- Update subject headings as appropriate to reflect DEI updates provided by the Library of Congress</li> <li>- Upgrade records to reflect current cataloging standards such as RDA (Resource Description and Access)</li> <li>- Create and maintain local series authority records for titles found in the SHARE database</li> </ul>	23 ILAC 3030.215 c) 3)
Set OCLC holdings for SHARE members in a timely manner.	<ul style="list-style-type: none"> <li>- Work collaboratively with partner automation group to set OCLC holdings for SHARE members</li> <li>- Correct bibliographic records as needed</li> </ul>	23 ILAC 3030.215 c) 9)

## Catalog Training for SHARE Members

**Goal: 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.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
<p>Offer member library staff comprehensive training in current bibliographic standards, both local and national, in order to maintain the required 15 hours of continuing education in cataloging per fiscal year.</p>	<ul style="list-style-type: none"> <li>- Provide monthly cataloging sessions excluding July and December.</li> <li>- Develop and publish a new training course on Moodle for new and current catalogers that will fulfill the cataloging certification requirements set forth by the SHARE Bibliographic and Cataloging Standards Committee</li> <li>- Keep abreast of changes in cataloging via staff continuing education opportunities to educate member library catalogers</li> <li>- Offer cataloging workdays either online or in person</li> <li>- Coordinate with Marketing/Communications and IT to create a webpage for member library staff to find continuing education opportunities (both free and paid) provided by highly qualified outside organizations</li> </ul>	<p>23 ILAC 3030.215 c) 6)</p>
<p>Help member library staff correctly search and match to bibliographic records found in the SHARE database based on item in hand or question from a patron.</p>	<ul style="list-style-type: none"> <li>- Teach classes, including Searching and Matching, Item Records, and Reports</li> <li>- Provide digital and in-person training opportunities to reach the widest possible number of SHARE member library staff and will continue to offer virtual training options, including new Moodle courses, as well as transitioning back to some in-person options in the future</li> <li>- Create and publish a new training course on Moodle for new and current barcoders that will be required to take every set number of years as determined by the SHARE Bibliographic and Cataloging Standards Committee</li> </ul>	<p>23 ILAC 3030.215 c) 6)</p>

## Cataloging Maintenance Center

**Goal: Provide cataloging and bibliographic services for libraries in the Reaching Across Illinois Library System (RAILS) and IHLS service areas to increase access and encourage resource sharing of information resources found in Illinois libraries.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Improve user access to information resources in LLSAP (Local Library System Automation Project) databases by removing duplicate bibliographic/authority records or "less than full level" bibliographic records.	<ul style="list-style-type: none"> <li>- Provide full-level OCLC records for substandard local records from library system LLSAP databases</li> <li>- Maintain statistics documenting requesting agency and number of bibliographic records upgraded</li> </ul>	23 ILAC 3030.215 c) 3)
Establish user access to Illinois libraries' special collections.	<ul style="list-style-type: none"> <li>- Catalog items and supply RAILS LLSAP staff with the resultant bibliographic records, or import the bibliographic records into the IHLS SHARE database for SHARE members</li> <li>- Transport special collections materials to and from the CMC via library system delivery service</li> <li>- Travel to libraries to catalog materials too fragile or unique for transport via delivery</li> <li>- Publicize CMC services via library systems' newsletters, conference presentations, and networking events</li> <li>- Maintain statistics documenting the requesting agency and the number of items cataloged</li> </ul>	23 ILAC 3030.215 c) 8)
Contribute at least 100 name or uniform title authority records annually to the Library of Congress Authority File for improved resource sharing.	<ul style="list-style-type: none"> <li>- Submit new name records to NACO (Name Authority Cooperative Program)</li> <li>- Distribute authority records via OCLC Connexion and, when necessary, supply the resultant records to LLSAP staff for importing</li> <li>- Maintain statistics documenting authority record creation</li> </ul>	23 ILAC 3030.215 c) 3)

**Goal: Support access to Illinois digital collections by providing information on the formation and content of metadata.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Establish metadata for items added to the Illinois Digital Archives (IDA) database to increase user access to digitized information.	<ul style="list-style-type: none"> <li>- Work with libraries to determine the information needed for metadata, where metadata and digital images will reside, then create metadata if necessary</li> <li>- Continue to provide metadata creation, including transcription, for various agencies</li> <li>- Develop a mobile memory lab, traveling to libraries and helping patrons scan and digitize local history and genealogy collections and creating digital files to upload to the Illinois Digital Archives (IDA) website</li> <li>- Maintain statistics documenting requesting agency and number of items for which metadata was created</li> </ul>	23 ILAC 3030.215 c) 8)

**Goal: Instruct Illinois library staff in the use of resource description, including cataloging and metadata.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Offer Illinois library staff training in generalized bibliographic services, cataloging, and metadata.	<ul style="list-style-type: none"> <li>- Schedule online and/or in-person classes on cataloging and metadata topics</li> <li>- Develop cataloging and metadata presentations</li> <li>- Attend and present at LLSAP member meetings and conferences, offering short discussions on cataloging and metadata</li> <li>- Conduct Online with the CMC webinars throughout the year with brief presentations including a question-and-answer component</li> <li>- Provide cataloging workdays for libraries who have questions concerning OCLC Connexion and cataloging difficult items</li> </ul>	23 ILAC 3030.215 c) 6)



## C. Delivery

Delivery has come a long way since the formation of IHLS 10 years ago. The Operational Plan serves as a guide to where delivery is going in its constant quest to provide the best, most efficient ways of service to our member libraries.

Delivery still takes seriously those ideas from the Statewide Delivery Committee. As we move forward into FY2023, they are still the basis for many of our goals. When paired with our member libraries' needs, these provide a solid roadmap.

The focus of delivery in many ways will remain the same:

- Ongoing compliance with the recommendations of the Illinois Statewide Delivery Committee.
- Continued access to five-day a week delivery model.
- Provide accurate and consistent delivery to member libraries.
- Provide accurate sorting of library materials.
- Standard training for delivery staff across all hubs.

Delivery will continue to explore technology and the benefits it provides for the department. From enhanced data collection to the ability to notify drivers remotely about changes, we utilize an in-house developed app to analyze delivery information.

Another technology piece that is being investigated, is the Automatic Material Handler (AMH) or as it is referred to often, the sorting machine. It is anticipated that this machine would not only benefit IHLS in savings, but our SHARE member libraries as well will realize a savings.

Additional actions will include:

- Remain on the American Library Association (ALA) Reference and User Services Association (RUSA) Physical Delivery Group to be able to jump start new ideas from participants who do delivery in different ways.
- Utilize the Delivery Working Group (DWG), which is made up of member libraries and IHLS staff, as a resource for potential feedback for delivery on potential projects.

### Delivery Services

**Goal: Provide efficient provision of delivery services designed to support resource sharing among IHLS members.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Comply with recommendations of the Statewide Delivery Committee.	- Monitor compliance progress on an ongoing basis	23 ILAC 3030.215 e) 5) E)

Continue to enhance member services.	<ul style="list-style-type: none"> <li>- Provide access to five-day a week delivery</li> <li>- Provide accurate sorting of library materials</li> <li>- Evaluate routes in order to provide the best service possible and to run as efficiently as possible</li> <li>- Create flexible solutions to current and local events that affect service to member libraries</li> <li>- Delivery on the Go service (DOGs)</li> <li>- Evaluate and implement recommendations for an Automatic Material Handler (AMH)</li> <li>- Evaluate full-time driver positions to potentially increase member library trust</li> <li>- Help create, manage, and schedule a Mobile Library of Things that would provide items for library events that due to cost, no storage for large items, or one-time use items could be borrowed from the system</li> </ul>	23 ILAC 3030.215 e) 4)
Quantify the impact of the delivery service.	<ul style="list-style-type: none"> <li>- Assess the impact of delivery services for all IHLS member libraries using the Polaris software for SHARE members and the daily counts from other informational tools for remaining members</li> <li>- Send out and evaluate results of IHLS annual delivery survey by June. Share with stakeholders the results of that survey and work with the Marketing/Communications and IT departments</li> <li>- Evaluate a surplus vehicles grant</li> <li>- Purchase vehicles to replace ones that were considered surplus the previous year</li> </ul>	23 ILAC 3030.215 e) 5)

**Goal: Provide accurate information and educational tools to support delivery.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Work with Marketing/Communications and IT to publish materials.	<ul style="list-style-type: none"> <li>- Publicize training materials created to explain all aspects of delivery, from packing a tub to filling out a label correctly</li> <li>- Create a meet our staff section on the delivery intranet</li> <li>- Help develop an ILA Reporter article about the impact resource sharing and delivery has on libraries</li> </ul>	23 ILAC 3030.215 e) 6)
Advocate delivery services to member libraries.	<ul style="list-style-type: none"> <li>- Utilize newsletters such as the IHLS Member Connection newsletter and the SHARE newsletter to share tips and best practices</li> <li>- Attend networking events/conferences/trainings</li> </ul>	23 ILAC 3030.215 e) 6)

	- Attend and present at IHLS-sponsored events	
Participate in networking groups.	- Attend and participate in the American Library Association (ALA) Reference and User Services Association (RUSA) Physical Delivery Group	23 ILAC 3030.215 e) 3)

## D. Resource Sharing

Sharing Heartland’s Available Resources Equally (SHARE) will continue working on established goals, while adding substance to the original resource sharing plan of service:

- Highlight the focus on full participation in resource sharing as outlined in the Illinois Administrative Code.
- Utilize a variety of tools for communications and training to ensure libraries are familiar with the ILLINET Interlibrary Loan (ILL) Code.
- Develop the SHARE program, promoting membership advantages in the largest library automation consortium in North America, while exploring alternative funding opportunities that would help offset participation costs.
- Respond to SHARE member suggestions with a thoughtful review of existing policies and procedures.
- Provide opportunities for increased member engagement in a multitype library environment.
- Remain alert to opportunities for improvement that might present themselves during the fiscal year.
- Continue to research and review e-resources that would be beneficial to SHARE and IHLS members.
- Explore ways to promote Equity, Diversity, and Inclusion (EDI) initiatives in the SHARE program.

### SHARE

**Goal: Provide an innovative resource discovery, sharing, and automation group.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Encourage resource sharing.	<ul style="list-style-type: none"> <li>- Promote member library participation in reciprocal borrowing within the system and throughout the state</li> <li>- Educate member libraries on the variety of resource sharing pathways, including OCLC, ALA, and the multiple advantages of SHARE</li> <li>- Educate school library staff and teachers about the multiple advantages of SHARE, so they can better utilize existing resources</li> <li>- Review the SHARE and IHLS interlibrary loan and resource sharing policies to ensure it is up-to-date and aligned to current Illinois Library Laws &amp; Rules</li> <li>- Facilitate consortial groups to participate in shared resources or vendor discount programs to meet the ongoing needs of system members</li> <li>- Offer additional innovative resource sharing opportunities outside of the traditional ILS framework, such as the Kit &amp; Kaboodle program, SHARE Mobile Library, or McNaughton Book Leasing</li> </ul>	23 ILAC 3030.215 f) 3) D) i

<p>Provide a framework for members to participate in a state-of-the-art integrated library system.</p>	<ul style="list-style-type: none"> <li>- IHLS Board of Trustees acts as legal and financial authority for SHARE, including management of the SHARE investment account, with input from the SHARE Finance &amp; Policy Committee and SHARE Executive Council</li> <li>- Evaluate SHARE’s financial health, including cash flow, benchmarks, and long-term goals</li> <li>- Evaluate membership fees to ensure they will continue to meet projected financial obligations</li> <li>- Continue to evaluate current SHARE policies with the SHARE Executive Council, the Bibliographic and Cataloging Standards Committee, the Circulation and Resource Committee, the E-Resource Committee, and the Finance and Policy Committee</li> <li>- Analyze trends and build relationships with vendors that offer enhancements to the SHARE catalog, e-resource platforms, and other shared technology needs</li> <li>- Offer SHARE committee members information regarding emerging technologies in order to discuss potential upgrades to infrastructure</li> <li>- Provide responsive training to meet member needs, utilizing a variety of instruction methods, in order to reach staff that have difficulty in participating in traditional continuing education opportunities</li> <li>- Maintain a certification program for member library staff, to provide a high level of database accuracy and library efficiency</li> <li>- Continue to evaluate the feasibility of a substitute staff program</li> <li>- If a member library does not wish to continue their participation in the SHARE consortium, provide cost estimates for data migration (through Polaris) and provide support as they transition out of the program</li> <li>- Collaborate with IT and Marketing and Communications to enhance the SHARE website to meet the informational and training needs of member libraries</li> <li>- Track technical issues through the SHARE help desk and provide support for SHARE members</li> <li>- Maintain all critical SHARE information, including fees, automation settings, and training, while</li> </ul>	<p>23 ILAC 3030.215 c) 1)</p>
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	<p>transitioning data to an IHLS-wide member management solution that combines data from various access points</p> <ul style="list-style-type: none"> <li>- Encourage a wide variety of professional development opportunities for SHARE staff to build expertise on different facets of librarianship</li> <li>- Seek out diverse staff and committee members; welcome differences of thought, experience, and culture</li> <li>- Promote equity among members, by evaluating SHARE policies, procedures, and decision-making processes to make sure that they are fair; support equity initiatives of members, especially for those that are addressing underserved and marginalized communities</li> </ul>	
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## SHARE Development

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

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Continue to promote the growth of SHARE.	<ul style="list-style-type: none"> <li>- Market the advantages of belonging to the SHARE consortium via formal quotes, networking, and conference participation. Continue to seek ways to assist libraries with migration costs, so they can participate in SHARE</li> <li>- Support members as they strive to meet the benchmarks established by the Illinois State Library to participate in resource sharing and to have a discoverable collection</li> <li>- Assess barriers to SHARE membership beyond financial restraints</li> </ul>	23 ILAC 3030.215 c) 1)

## ILLINET Interlibrary Loan

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

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Educate members about the ILL Code.	<ul style="list-style-type: none"> <li>- Work with statewide partners to develop training opportunities</li> <li>- Respond to questions from members about the ILL Code regularly and communicate pertinent issues to the membership via committee meetings and system events, newsletters, email blasts, and social</li> </ul>	23 ILAC 3030.215 c) 1)

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Enforce ILL Code standards.	<ul style="list-style-type: none"> <li>- Maintain regular contact with member libraries to help ensure understanding and compliance with the ILLINET Code</li> <li>- Monitor ILL violation reports and when necessary, work with member libraries to ensure compliance, while also mediating between member libraries in the event of disputes</li> <li>- Provide instructions and training for members to gather data for annual reporting for the annual ILLINET Interlibrary Loan Traffic Survey</li> </ul>	23 ILAC 3030.215 f) 3) D) i

## E-Resources

**Goal: Increase e-resource use through increased vendor opportunities, comprehensive library staff training, and marketing support to members.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Pursue shared e-resource opportunities to all multitype member libraries.	<ul style="list-style-type: none"> <li>- Continue developing group purchase opportunities for electronic resources to meet the needs of interested library members and their patrons</li> <li>- Facilitate user focus groups and system networking events to review member library e-resource preferences to meet the ongoing needs of library system members</li> <li>- Work with state partners to explore additional e-resource opportunities</li> <li>- Contact various e-resource providers to obtain information about their services to provide to member libraries</li> <li>- Communicate opportunities by connecting vendors to members; provide information through existing communications channels, such as networking events, committee meetings, product demonstrations events, newsletters, email marketing, and social media</li> </ul>	23 ILAC 3030.215 b) 1)

<p>Increase use of e-resources in SHARE member libraries including (but not limited to) downloadable content and databases.</p>	<ul style="list-style-type: none"> <li>- Provide on-site assistance to library staff who will then provide training to their patrons</li> <li>- Create a variety of training materials for member library use</li> <li>- Provide members with marketing support of digital products, either through vendor materials, created content, or the development of shared best practices</li> <li>- Work with the SHARE E-Resource Committee to review products, policies, and practices for each of the platforms, as well as approve member fees for each consortial product</li> <li>- Utilize purchasing power to support a diverse shared digital collection, with diverse authors (culturally diverse, religiously diverse, LGBTQIA+ diverse, ability diverse) so that readers may see themselves reflected in the available items or learn about those that have different experiences</li> <li>- Incorporate collection audit analysis tools to support diversity within the shared digital collection</li> <li>- Utilize discovery tools to promote Equity, Diversity and Inclusion (EDI) and connect readers with a wider world</li> </ul>	<p>23 ILAC 3030.215 b) 1)</p>
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## E. Membership

The primary focus of this section of the annual grant application must always be about efficient and effective ways IHLS can reach out to membership and provide support to them.

In FY2023, Membership Services hopes to build on the work done in FY2022 and provide:

- Continued work with any member library on compliance issues as they relate to those stated in the Administrative Code.
- Expand support for, and connections among, our school library membership.
- Training for public library trustees in a variety of modalities to determine the most effective methods of reaching that group of stakeholders.
- Mentorship for new public library directors.
- A continuing education program rolled out in a biannual manner.
- Increased networking opportunities for libraries of all types.
- Ongoing efforts to identify, offer, and promote professional development opportunities for all members

### Membership Services

**Goal: Review membership of all system agencies on an annual basis.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Support the annual statewide certification process.	<ul style="list-style-type: none"> <li>- Monitor library activities during the certification timeframe</li> <li>- Monitor and follow up with libraries experiencing membership challenges</li> </ul>	23 ILAC 3030.215 a) 4)
Maintain timely and accurate information on our membership.	<ul style="list-style-type: none"> <li>- Encourage our membership to update their accounts in Library Directory and Learning (L2) on a regular basis</li> <li>- Work within the parameters of our developing membership database to consistently update information</li> <li>- Identify school library staff in each building where they exist, identify district librarian if they exist, and separate school admin contacts from library contacts where possible</li> <li>- Maintain updated non-resident borrower card purchase information on L2</li> <li>- Monitor the submission of the annual ILLINET Traffic Survey.</li> <li>- Expand background information on the non-resident program on the IHLS website and assist member libraries with questions regarding non-resident laws.</li> </ul>	23 ILAC 3030.215 a) 4)

**Goal: Support member libraries in their efforts to provide excellent library service to their stakeholders.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
<p>Provide support to membership on an ongoing basis.</p>	<ul style="list-style-type: none"> <li>- Conduct site visits at diverse libraries, focusing on libraries with new directors or libraries facing challenges. It is expected that with additional staff, IHLS can be more responsive to our school library membership</li> <li>- Discuss issues with member libraries that pertain to their compliance with the administrative code and library management</li> <li>- Work with membership on annual tasks outside of certification (Per Capita Grants, IPLARs, non-resident fee surveys, etc.)</li> <li>- Work on creating a welcome letter to new directors that lists annual tasks and requirements with perhaps an additional annual reminder letter to all directors</li> <li>- Provide support for networking groups and update lists of groups to determine if additional groups should be formed</li> <li>- Provide mentor opportunities for new public library directors</li> <li>- Work one-on-one with libraries and trustees when they are faced with specific challenges that arise during the year</li> <li>- Visit schools as well as their administrative offices to learn about their library programs and assess what support they need</li> <li>- Create a Directors' Chat type of networking opportunity for school librarians at a more convenient time (before or after school)</li> <li>- Create a listserv for member school librarians where they can share concerns and other information specific to our region or system</li> <li>- Educate school libraries on the availability and benefits of shared resources</li> </ul>	<p>23 ILAC 3030.215 a) 4)</p>
<p>Provide information and consulting to agencies interested in pursuing system membership.</p>	<ul style="list-style-type: none"> <li>- Work cooperatively with library agencies interested in system membership</li> <li>- Develop specific outreach for school districts who are not currently system members</li> </ul>	<p>23 ILAC 3030.215 a) 4)</p>

Increase outreach to public library trustees and school boards.	<ul style="list-style-type: none"> <li>- Explore in-person and electronic methods of informing and educating trustees of public libraries and school districts</li> <li>- Develop diverse methods of trustee training, communication, and networking</li> </ul>	23 ILAC 3030.215 a) 3) D)
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## Networking

**Goal: Continue to develop relationships with and among the membership.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Provide and participate in networking initiatives throughout the system.	<ul style="list-style-type: none"> <li>- Pursue the creation of an outreach/member engagement committee group</li> <li>- Hold Members Matter meetings in hybrid formats through the system on a regular basis</li> <li>- Connect target audiences via regularly scheduled online chats</li> <li>- Participate in regional networking groups</li> <li>- Explore school library specific networking opportunities</li> </ul>	23 ILAC 3030.215 a) 2)

**Goal: Continue active partnerships in statewide and national initiatives that support enhanced library service.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Encourage professional development and continuing education opportunities for member libraries.	<ul style="list-style-type: none"> <li>- Explore opportunities for shared services in consulting and continuing education</li> <li>- Participate, as appropriate, in committee work that benefits our stakeholders</li> </ul>	23 ILAC 3030.215 d) 1)

**Goal: Work with library entities that improve member services.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Attend user group conferences appropriate for our industry and network with fellow colleagues at these conferences.	<ul style="list-style-type: none"> <li>- Attend statewide and national conferences that support IHLS members, and the services offered. This would include, but not be limited to Illinois Library Association (ILA), Association of Illinois School Library Educators (AISLE), Innovative Users Group (IUG), Online Audiovisual Catalogers (OLAC), Computers in Libraries, Reaching Forward South, American Library Association (ALA), and the Association for Rural and Small Libraries as funding allows</li> <li>- Grow relationships with organizations worldwide that share our values on resource sharing and innovation</li> </ul>	23 ILAC 3030.215 d) 1)

## Continuing Education

**Goal: Increase continuing education opportunities as allowed by Illinois State Library (ISL) directive.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Identify ways to educate member libraries on applicable state, federal, and administrative laws.	<ul style="list-style-type: none"> <li>- Include one or more state, federal, or administrative law components at Member Day</li> <li>- Provide opportunities for school librarians to learn about state and federal laws applicable to their work</li> <li>- Explore professional development opportunities regarding state, federal, and administrative laws for libraries</li> </ul>	23 ILAC 3030.215 d) 1)
Identify or provide opportunities for continuing education and professional development on an array of topics.	<ul style="list-style-type: none"> <li>- Continue to develop annual Member Day</li> <li>- Explore the development and implementation of an IHLS continuing education calendar</li> <li>- Create professional development that is specific to school librarians and meets their continuing education requirements for the Illinois State Board of Education (ISBE)</li> <li>- Explore the creation of a calendar of professional development opportunities that provide professional development hours for school librarians and promote those opportunities to the school library community</li> <li>- Promote continuing education offered by the Illinois State Library, the Illinois Library Association, and the Association of Illinois School Library Educators</li> <li>- Share information regarding online continuing education opportunities</li> <li>- Develop Equity, Diversity, and Inclusion (EDI) training opportunities for member libraries</li> <li>- Explore and promote continuing education opportunities for trustees</li> <li>- Investigate innovative resources for professional development</li> <li>- Bring a Continuing Education Coordinator into the Membership Team at some point during FY2023</li> </ul>	23 ILAC 3030.215 d) 1)

## Grants

**Goal: Consistent communication of available grants.**

<i>Objectives</i>	<i>Planned Activities</i>	<i>System Standard</i>
Provide awareness of grant	<ul style="list-style-type: none"> <li>- Work contractually with a grants writer to maximize opportunities for additional funding</li> </ul>	23 ILAC 3030.215 d) 1)

opportunities for member libraries.	streams <ul style="list-style-type: none"><li>- Develop and submit grant opportunities on behalf of IHLS that support the organization's goals and objectives</li><li>- Promote grants appropriate to our 524 multitype member libraries via diverse channels of communication</li><li>- Present grant writing workshops to member libraries</li></ul>	
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