

**SEPTEMBER ACTIVIES FOR THE OCTOBER BOARD MEETING****IHLS Monthly Staff Report****Tying our Activities to the ISL Priorities****Priority: Resource Sharing****Goal I: Provide an innovative resource discovery, sharing and delivery system:****Objective A: Encourage resource sharing****Activities**

1. Monitor SHARE policy and protocol compliance and coordinate those policies with IHLS policies regarding resource sharing.
  - SHARE staff participated in meetings with the SHARE Executive Council, Finance/Policy Committee, and Bibliographic and Cataloging Standards committees
2. Utilize training on the SHARE Polaris platform for all available modules across a variety of delivery methods. When appropriate, interlibrary loan, reciprocal borrowing and reciprocal access as well as copyright will be addressed.
  - 20 classes were conducted this month by SHARE staff, including, but not limited to, circulation, barcoding, searching and matching records in Polaris.

| SHARE Statistics | FY15        |         |                         |                 |           |           |         |
|------------------|-------------|---------|-------------------------|-----------------|-----------|-----------|---------|
|                  | Circulation | ILL     | Reciprocal<br>Borrowing | Pac<br>Searches | Holdings  | Bibs      | Patrons |
| May-14           | 736,091     | 129,779 | 58,784                  | 651,784         | 9,027,758 | 1,886,611 | 802,743 |
| Jun-14           | 822,888     | 125,101 | 65,477                  | 788,302         | 9,003,233 | 1,883,498 | 797,887 |
| Sept-14          | 905,510     | 154,053 | 55,538                  | 742,432         | 8,995,198 | 1,872,863 | 810,038 |
| Oct-14           | 919,651     | 163,798 | 55,769                  | 879,563         | 9,009,041 | 1,828,813 | 811,636 |
| Nov-14           | 774,715     | 131,037 | 48,673                  | 757,958         | 9,019,234 | 1,830,868 | 814,280 |
| Dec-14           | 730,911     | 130,580 | 48,792                  | 613,143         | 9,009,264 | 1,841,676 | 805,018 |
| Jan-15           | 858,769     | 155,127 | 57,008                  | 735,170         | 8,991,006 | 1,839,988 | 804,899 |
| Feb-15           | 790,917     | 145,355 | 52,047                  | 687,870         | 9,001,314 | 1,843,721 | 804,008 |
| Mar-15           | 863,377     | 159,912 | 56,228                  | 1,560,054       | 9,010,811 | 1,835,452 | 803,628 |

|         |         |         |        |           |           |           |         |
|---------|---------|---------|--------|-----------|-----------|-----------|---------|
| Apr-15  | 811,727 | 148,130 | 52,698 | 1,815,939 | 9,023,056 | 1,840,633 | 807,234 |
| May-15  | 676,532 | 126,478 | 51,043 | 1,324,682 | 9,029,121 | 1,834,127 | 803,903 |
| Jun-15  | 830,204 | 135,395 | 67,776 | 1,253,461 | 9,044,459 | 1,817,765 | 804,119 |
| July-15 | 784,275 | 139,522 | 65,457 | 1,459,531 | 9,048,654 | 1,834,594 | 806,374 |
| Aug-15  | 728,662 | 133,642 | 54,040 | 1,462,566 | 9,044,518 | 1,839,709 | 817,506 |
| Sept-15 | 880,528 | 149,817 | 52,764 | 1,583,263 | 9,059,551 | 1,840,295 | 820,009 |

**Objective B:** Provide a framework for members to participate in a state-of-the-art integrated library system.

**Activities**

1. Continue participation in the Statewide E-Books Grant opportunity.
  - At the end of September, 166 SHARE library agencies are participating in the 3M Cloud Library shared collection. Two new libraries started participation on October 1.
  - 12,712 eBook and eAudiobook titles were circulated in the month of September.
  - Three staff trainings and three patron events were held in the month of September with a total of 21 attendees.
2. Apply for appropriate grants to provide enhancements to the SHARE catalog.
  - Submitted a grant proposal to Wal-Mart for a state grant to support expansion of eResources
3. Promote new membership in the SHARE LLSAP through the *Growing Resource Sharing in IHLS Through Growing SHARE* grant. IHLS will continually consider opportunities to more fully involve these members in resource sharing.
  - added Odin Schools as a transitional member
  - had contact with three schools that are considering joining SHARE
4. Continue to support the SHARE Helpdesk to track concerns and technical issues with the Polaris software.
  - Continue to respond to Helpdesk tickets

**Objective C:** Ensure the integrity of bibliographic records.

**Activities**

1. Maintain the requirement that all bibliographic records (with the exception of equipment, on order and E-book) must be OCLC derived records and have an OCLC control number to ensure database standards and mitigate duplicate records.
  - Staff corrected and enhanced 245 items that had non-OCLC bibs in the SHARE database.

2. Support a Cataloging Center operation for SHARE Full members for copy and original cataloging of MARC bibliographic records and the creation of local authority records to enhance recovery. Service options are Cataloging Library (Full member meets continuing education requirements for cataloging staff and performs own cataloging); Barcoding A Library (Full member sends all new materials to Center for copy and original cataloging and assessed fee based on percentage of library's materials budget); Barcoding B Library (full member sends new materials as needed for original cataloging and assessed fee of \$10 per item cataloged). Any item that meets the Cataloging Maintenance Center's (CMC) eligible collections criteria for free cataloging is passed on to the CMC.
  - Cataloged 1128 items for SHARE member libraries.
  - Imported 121 \$3 Bib bibliographic records.
  - Cataloged 1195 retrocon items for new libraries joining SHARE.
  - Cataloged 82 items through the CMC.
3. Provide appropriate training for cataloging.
  - 16 classes or sessions on cataloging, barcoding and searching/matching were held during September, with 169 attendees for 344.5 contact hours.
  - Cataloger's Training Session was held via Adobe connect.
  - Worked with several new libraries that are going live on SHARE, providing additional information about item and bibliographic records.
  - Answered member libraries' questions, phone calls and emails concerning cataloging.
4. Evaluate the current methods utilized for ensuring the quality of the database through cataloging.
  - Merged 242 bibliographic records in the SHARE database. Edited 331 bibliographic records, and corrected 1846 item records.

**Objective D:** Operate Cataloging Maintenance Centers on behalf of libraries in Illinois.

**Activities**

1. Fulfill NACO (Name Authority Cooperative Program of the PCC) obligation by creating a minimum of 100 name or uniform title authority records per year.
  - 14 name authority records were created by staff.
  - 11 local series headings authority records were created by staff.
2. Continue support of LLSAP database cleanup efforts in LLSAP.
  - Staff corrected and enhanced 242 items that had non-OCLC bibs in the SHARE database. 41 items were retrieved from the member libraries and OCLC bibs fully enhanced.
  - Cataloged 82 items through the CMC.

3. Cooperate with Illinois State Library staff to identify statewide cataloging needs and develop strategies to meet them, prioritizing statewide initiatives that require cataloging expertise to ensure statewide access and resource sharing assistance with projects as agreed upon.
  - Worked with IDA and the State Archives on prison record files from the Digital Grant.
  - Continue work on the Dr. Bradley sermons from Meadville Lombard Library for the Digital Grant.
  - Work continues with Chicago Botanical Gardens for the Digital Grant.

**Goal II: Provide a sustainable delivery system that provides the best service possible for Illinois libraries and their users.**

**Objective A:** Ensure that IHLS delivery of library materials is accurate, timely, and meets member library needs.

**Activities**

1. Working in concert with ISL, RAILS and CARLI, continue the implementation of recommendations from the Delivery Advisory Committee.
  - Met with ISL, CARLI and RAILS to discuss Community Delivery Partnerships
2. Conduct quarterly counts of library materials and continue to refine the counting methodology.
  - Conducted quarterly count September 14 through the 18, 2015
3. Sort materials daily to ensure all materials are distributed during the next scheduled delivery.
  - Have been able to maintain sorting all materials for the next day even with ILDS delays in the Champaign hub
4. Evaluate the average turn-around time that an item is in the IHLS delivery system and adjust as necessary, with the goal of reducing the time it takes for library patrons to receive requested library materials.
  - Have begun data collection regarding the time items take to go between our hubs
5. Conduct an annual delivery satisfaction and needs survey of member libraries and solicit recommendations from individual member libraries. Adjustments will be made based on need and feasibility.
  - 189 libraries participated in the Delivery Survey in September 2015

| September 2015 | Delivery picked up /delivered | ILDS Delivery Items to Hub | ILDS Delivery Items from Hub |
|----------------|-------------------------------|----------------------------|------------------------------|
| CHAMPAIGN      | 229,961                       | 31,566                     | 29,427                       |
| DU QUOIN       | 97,494                        | 23,202                     | 21,114                       |
| EDWARDSVILLE   | 182,786                       | 34,665                     | 31,642                       |

**Objective B:** Leverage existing delivery resources.

**Activities**

1. Follow the delivery replacement schedule in which fleet vehicles are replaced when mileage exceeds 200,000 miles.
  - Received 5 vans ordered from FY15 budget. Two are for Champaign hub and three are for the Du Quoin hub.
  
2. Evaluate direct and overhead costs for sorting and delivery.
  - A analysis is under way and should be completed by November.

**Priority: Illinois Machine Sublending Agency**

**Goal: Provide good customer service and well maintained machines to patrons of the Talking Books Program.**

**Objective:** Support the statewide machine lending program located in DuQuoin.

**Activities**

|                       | C1s Sent | DS1s Sent | DA1s Sent | BARD Inquiries Responded To |
|-----------------------|----------|-----------|-----------|-----------------------------|
| <b>August 2014</b>    | 9        | 173       | 94        | 13                          |
| <b>September 2014</b> | 22       | 154       | 134       | 15                          |
| <b>October 2014</b>   | 23       | 121       | 177       | 10                          |
| <b>November 2014</b>  | 10       | 110       | 114       | 12                          |
| <b>December 2014</b>  | 15       | 86        | 154       | 11                          |
| <b>Janury 2015</b>    | 22       | 78        | 159       | 14                          |
| <b>February 2015</b>  | 9        | 57        | 118       | 9                           |
| <b>March 2015</b>     | 19       | 86        | 176       | 13                          |
| <b>April 2015</b>     | 13       | 75        | 166       | 10                          |
| <b>May 2015</b>       | 21       | 74        | 139       | 14                          |
| <b>June 2015</b>      | 18       | 52        | 200       | 13                          |
| <b>July 2015</b>      | 29       | 72        | 225       | 15                          |

|                       |    |    |     |    |
|-----------------------|----|----|-----|----|
| <b>August 2015</b>    | 43 | 55 | 236 | 17 |
| <b>September 2015</b> | 15 | 24 | 284 | 7  |

1. Participate in the planning, coordination and evaluation of Illinois Talking Book Service, and ensure appropriate provision of services by staying informed of current procedures and trends related to Talking Books, the National Library Services/Library of Congress and librarianship in general.
  - 09/01/2015-09/07/2015- IMSA Patron Services Coordinator/ Manager and IMSA Machine Clerk alternated days at the DuQuoin State Fair.
  - 09/09/2015- IMSA Manager participated in conference call with TBBS Outreach Associate regarding current and future outreach.
  - 09/10/2015- IMSA Manager participated in conference call for TBBS Director’s Meeting.
  - 09/14/2015- IMSA Manager participated in conference call for 2016 Parents of Students with Visual Impairments Conference.
  - 09/16/2015- IMSA staff meeting was held.
  - 09/22/2015- IMSA staff participated in Real Colors training.
  - 09/30/2015- IMSA Manager participated in national NLS conference call, “Wednesdays with NLS”.
2. Ensure the efficient and successful provision of service in accordance with the Revised Standards and Guidelines.
  - Filled all requests for machines and equipment within 2 business days of receipt of request.
  - Responded to all BARD inquiries in a timely and efficient manner.

**Priority: Administrative Activities**

**Goal 1: Ensure effective utilization of IHLS resources**

**Objective A: Ensure fiscal accountability**

**Activities:**

1. Support the business operations of IHLS through monthly financial reports, payroll, accounts payable, and accounts receivable.
  - Prepared August 2015 Bill Payment, Credit Card Transaction Report and Statement of Revenues and Expenditures Reports for IHLS Finance Committee and Board of Directors.
  - Analyzed FY2014-2015 general ledger postings, reconciled general ledger accounts, and prepared documents for audit fieldwork.
  - Prepared and Entered Final FY2015 General Ledger Entries.
  - Completed FY2015 Audit Fieldwork.

- Prepared and processed two payrolls.
- Generated and mailed 216 accounts receivable invoices (*OCLC – 154 Monthly; SHARE – 62 SHARE Monthly Membership, 3M, Wowbrary, Zinio, & Add'l Module*).
- Received and posted 461 accounts receivable cash receipts checks (*OCLC – 225; SHARE – 215 & General – 21*).
- Disbursed 150 Accounts Payable Checks totaling \$259,536.18.
- Received and entered 211 accounts payable invoices.