JUNE Activities For The JULY 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. 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.
    ✓   SHARE staff provided 18 training opportunities for member library staff in July

SHARE Statistics

	Circulation	ILL	Recip Borrowing	PAC Searches	Holdings	Bibs	Patrons
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	1,834,549	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	1,583,243	9,059,551	1,840,295	820,009
Oct-15	879,923	154,768	54,091	1,534,168	9,080,171	1,841,444	820,440
Nov-15	794,162	138,719	50,122	1,275,520	9,090,614	1,831,683	822,005
Dec-15	704,714	136,089	49,398	1,326,196	9,094,615	1,831,795	821,453
2015 TOTALS	9,603,790	1,722,954	662,672	16,018,400			
2015 AVERAGES	800,316	143,580	55,223	1,334,867			
Jan-16	822,641	147,350	51,799	948,011	9,099,690	1,829,956	822,216
Feb-16	820,510	154,059	52,691	1,050,676	9,112,552	1,829,409	822,583
Mar-16	864,113	168,369	55,894	1,124,788	9,127,083	1,832,944	822,062
Apr-16	812,698	154,364	53,286	1,069,256	9,147,942	1,838,827	820,893
May-16	671,242	138,874	54,088	1,025,356	9,168,370	1,838,013	817,765

Jun-16	800,184	147,853	68,132	1,061,231	9,212,362	1,845,236	817,095

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.
   - ✓ Six libraries joined the Cloud Library shared collection on July 1, bringing the total number of participating library agencies to 188 (or 232 libraries).
   - ✓ As of June 30, 2016 the Cloud Library shared collection contained 26,310 items (21, 418 unique titles).
   - ✓ In the month of June, 22,982 Cloud Library items were circulated, an average of 766 items per day.
   - ✓ Preparations were made to facilitate the transfer of items from the Lewis and Clark Digital Consortium into the SHARE Cloud Library.
   - ✓ Three staff trainings and three Cloud Library Launch events were held with a total of 9 library staff and 5 patrons participating.

2. Employ a variety of instructional methods to allow SHARE members to work effectively and efficiently with the ILS, and other shared databases.
   - ✓ SHARE staff provided 18 training opportunities during July, covering a variety of subjects, and different venues (in person, v-tel, Adobe Connect, Skype)

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.
   - ✓ SHARE Director met with the Loda Township Library and Clay City Schools, and both signed agreements to join SHARE

4. Evaluate established criteria for SHARE LLSAP membership levels.
   - ✓ The SHARE Fee/Finance/Policy Committee reviewed the SHARE membership levels at their meeting on April 20, and determined that they should remain the same (Full, Transitional, and Affiliate)

5. Continue the development and enhancement of the SHARE website to meet the informational and training needs of the IHLS libraries. Provide software and technical support for members of the LLSAP.
   - ✓ Members of the SHARE staff are working on an overhaul of the SHARE website, which will be online by the end of July.

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 14 items that had non-OCLC bibliographic records in the SHARE database during June. This is down since we have been working on a different project.

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 833 items in June for SHARE member libraries, for a total of 9749 during FY 2016.
   - ✓ Imported 107 that qualify has $3 Bib bibliographic records, for a total of 1426 during FY2016.
   - ✓ Cataloged 1009 retrospective conversion (i.e. retrocon) items in May for new libraries joining SHARE, for a total of 11562 during FY2016.
   - ✓ Cataloged 183 items in June through the CMC, for a total of 1911 during FY2016.
   - ✓ Created 87 on order bibliographic records in June, for a total of 2178 for FY2016.
3. Provide appropriate training for cataloging.
   - ✓ 13 classes or sessions on cataloging, barcoding, serials, searching/matching were held during April, with 101 attendees for 235 contact hours. For the FY2016, we offered 147 classes for 1637 librarians for total of 3496.5 contact hours.
   - ✓ Provided Dewey Classification classes.
   - ✓ Provided LCSH and Authority records classes.
   - ✓ And the ever popular Barcoding 1 and 2 classes were offered 3 places.
   - ✓ 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 522 bibliographic records in the SHARE database during June, for a total of 5478 during FY2016.
- ✓ Edited 1879 bibliographic records during June for a total of 12,502 during FY2016.
- ✓ Corrected 152 item records during June for a total of 13200 during FY2016.

5. Evaluate the efficacy and fee models associated with the Cataloging Center operation for possible revision.
   - ✓ Working with schools and libraries to review costs and find best option.
   - ✓ Working on Acquisitions and possibilities for more libraries to use the module.

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.
   - ✓ A total of 129 name authority records were created by staff during FY2016.
   - ✓ 3 local series heading authority records were created by staff for a total of 74 for FY2016.

2. Continue support of LLSAP database cleanup efforts in LLSAP.
   - ✓ Staff corrected and enhanced 3809 items that had non-OCLC bibliographic records in the SHARE database during FY2016. 680 were retrieved from the member libraries and OCLC bibliographic records fully enhanced.
   - ✓ Cataloged 183 items in June through the CMC, for a total of 1911 during FY2016

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.
   - ✓ Continue work on documents from Meadville Lombard Library for the Digital Grant. Transcription of the other documents that were digitalized continues.
   - ✓ Transcription of the papers from the Chicago Botanical Gardens continues, with several additional completed.
   - ✓ Transcription of the ledgers from the State Archives as well as the immigration papers from SIU-Carbondale has begun.
   - ✓ Increased the amount of staff working on the transcription so that projects could be more complete by December 2016.

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.
    ✓ Changed routes to reflect LASA (Laboratory of Applied Spatial Analysis) recommendations in order to achieve functional 5 day a week service

June 2016	Delivery picked up /delivered	ILDS Delivery Items to Hub	ILDS Delivery Items from Hub
Champaign	184,055	32,228	30,736
Du Quoin	101,523	22,444	23,428
Edwardsville	180,196	31,948	32,673

Priority: Illinois Machine Sub-lending 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 Du Quoin.
Activities.

	C1s Sent	DS1s Sent	DA1s Sent	BARD Inquiries Responded To
July 2015	29	72	225	15
August 2015	43	55	236	17
September 2015	15	24	284	7
October 2015	34	4	317	11
November 2015	34	12	250	18
December 2015	13	6	217	14
January 2016	13	11	239	9
February 2016	12	9	282	13
June 2016	0	3	214	0

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.

   ✓ In June, IMSA actively worked to wrap everything up within the IMSA DuQuoin office in order to transfer that work to Springfield.

   ✓ On June 16th-17th, the IMSA Manager travelled to Springfield to meet with ISL/TBBS to train staff, consult and answer any questions they may have had.

   ✓ Starting June 20th, the Illinois State Library Talking Book and Braille Service (ISL/TBBS) took over all machine agency functions. IMSA was available to answer questions they may have had, as well as to take patron calls and direct them to the correct resource. In addition, IMSA packed up remaing resources to go to ISL/TBBS, disposed of old materials and prepared the Du Quoin space to be vacated.

   ✓ June 30th was the last day for IMSA staff

Priority: Provide timely and pertinent information to member libraries

Goal: Effective and efficient communications with member libraries and partners.
Objective A: Provide various mechanisms to ensure good communications with member libraries and partners.
Activities
1. Conduct visits to 20% of our more than 550 agencies. This goal would give IHLS staff the opportunity to arrange approximately 110 on-site visits. A particular area of focus would be those library agencies who have recently seen a change in leadership. Another target audience would be those libraries facing any challenges that might impact their membership status and their ability to receive system services. Also in consideration would be conversations with library boards or other administrative bodies who might request specific information from IHLS. School staffing has shifted dramatically in the last several years and working to ensure that population is informed about system services and membership criteria would have a broad-based impact. When appropriate, system staff will also be available to meet with special interest groups for the purpose of discussing membership criteria and system services.
   ✓ On June 3rd, Ellen Popit and Chris Dawdy visited the Auburn and Greenfield libraries to visit with new directors
   ✓ On June 20th, Ellen Popit and Chris Dawdy visited the Clay City Schools to discuss membership and the possibility of that district joining SHARE

2. Maintain an interactive website to assist member libraries in effective utilization of IHLS services and promote member forums.
   - ✓ Worked with vendors seeking discounts for the Vendor Discount page on the IHLS website.
   - ✓ New grant opportunities were added to the Grants page on the IHLS website.

In FY16
- In concert with membership, system staff will strive to make communication with stakeholders as efficient and timely as possible.
  - ✓ Worked with libraries to schedule the new Members Matter meetings.
  - ✓ Created a year-end booklet for annual meeting.
  - ✓ Shared information regarding upcoming changes in delivery by sending emails and posting to the website.
  - ✓ Shared Enfold (Plinkit) information with library seeking new 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 and shared on Facebook.
  - ✓ The IHLS newsletter, Moving Forward Together, was sent each week to over 2,100 subscribers.

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 FY2016-2017 Annual Operating Budgets and Narratives for General, CMC, OCLC, Capital Projects, and SHARE Funds for IHLS Board approval and submission to ISL on June 30, 2016.
   - ✓ Forecasted IHLS Cash Reserve funding projection of operations for FY2016-2017.
   - ✓ Prepared and processed two payrolls.
   - ✓ Prepared May 2016 Bill Payment, Credit Card Transaction, Statement of Revenues and Expenditures, and Balance Reports for IHLS Finance Committee and Board of Directors.
   - ✓ Generated and mailed 167 accounts receivable invoices (OCLC – 19 Monthly and 115 Transactional; SHARE – 2 SHARE Monthly, 14 3M eBooks; Dream Grant – 1 Receipt Printer Reimbursement; General – 1 Library Law Book, 14 Dreamhost Domain Name, and 1 Room Rental).
   - ✓ Received and posted 119 accounts receivable cash receipts checks (OCLC – 68, SHARE – 38 & General – 13).
   - ✓ Received and entered 190 accounts payable invoices.

✓ Disbursed 155 Accounts Payable Checks totaling $266,954.88.

Objective B: Employ qualified, professional, accountable staff.
Activities
1. Recruit and employ qualified personnel of diverse backgrounds to carry out the mission and goals of IHLS. Increase the applicant pool by participating in local community events, college job fairs and advertising current openings with culturally diverse media and professional organizations.
   ✓ Conducted four new hire orientations

Goal II: Partner with the Illinois State Library and other organizations to support statewide services.

Objective A: Maintain the accounting operation for the ILLINET OCLC grant.
Activities
1. Ensure adequately trained, professional staff are assigned to this project.
   ✓ Will continue hands on training with the Traverse software. Additional training on the Traverse 11 upgrade was done on site with Alternative Business Systems.
   ✓ Online training through Fred Pryor is offered to all of the OCLC staff.
2. Provide required grant applications and reports in a timely manner.
   ✓ The FY2017 OCLC Billing Grant Application was submitted to the Illinois State Library.
3. Provide administrative support.
   ✓ IHLS provides ongoing administrative support for the OCLC Billing grant.
   ✓ The IT department worked with Alternative Business Systems in the conversion to Traverse 11 and the updating of our online account website.