



Illinois Heartland Library System
FY2016 Library System Annual Report
23 Ill. Adm. Code 3030.270 (Multitype System)

1.1 FY2016 Narrative Report for the Illinois Heartland Library System

Achieving Stability in Uncertain Times: IHLS in FY2016

FY2016 witnessed the 50th year of library systems in Illinois. Throughout five decades of service to Illinois libraries and the patrons they serve, best practice examples provide guidance for merged services and cultures. However, some situations require a new approach to a constant challenge in the world of library systems—consistency in financial support. It is no longer appropriate or prudent to accept the status quo of funding available via the Library System Area and Per Capita Grant (SAPG). Of course, hindsight is a wonderful gift, and our vision is much improved with the fiscal year behind us.

We have learned much about our capacity for patience, thrift, and creativity in the last year. The Illinois budget impasse affected our organization by placing some programs on hold and reducing the size of others. Although it is not unusual to begin a fiscal year without an approved SAPG, it is most extraordinary to be apprised at the midpoint of the year's funding level—especially with funding reduced to 58% of the previous years' level. The extended period of funding uncertainty allowed IHLS to take an honest look at procedures and services both external and internal. When funding news arrived, we were able to respond with reluctant confidence, knowing the difficult decisions we made would preserve system services into the future.

In FY2016, IHLS provided core system services to support resource sharing in the state: automated catalog support via the SHARE (Sharing Heartland's Available Resources Equally) Consortium, delivery of library materials, support of Talking Book and Braille Services via the Illinois Machine Sublending Agency (IMSA) and interlibrary loan training and support. Each service provided to our 537 member library agencies is backed by administrative staff and functions to create the whole. Our organization is at its best when we find ways to provide more benefits to members with less funds. We are able to improve and enhance services (inside and out) when we focus on fundamentals, on basic elements of projects and services and scale to fit the need.

For IHLS, the simpler, the better. You will find examples of this innovative spirit in all areas of our organization. The inventive nature of our staff paired with a strong service instinct have served our members well and will continue as we move through FY2017 and beyond.

For ease of review, this report follows the IHLS revised FY2016 plan of service submitted March 29, 2016. As instructed by the Illinois State Library (ISL), the original plan of service was modified to reflect any parts of our operations impacted by the decrease in funding.



Administrative

Every project our organization is involved in is improved by communication. Our cross-departmental communications team reviews all general messages to members, newsletters (external and internal), meeting presentations and marketing materials. In FY2016, we launched a directors-only listserv for system members. In addition, IHLS staff developed and promoted a new vehicle for member engagement and networking—Members Matter meetings, with the first meeting held July 12, 2016.

Our “doing more with less” philosophy works in many situations but not all. The IHLS success story is due in large part to the creativity, knowledge and synergy of our staff. A significant decrease in funding for FY2016 yielded the unfortunate consequence of position eliminations and reduction in staff by attrition. In total, 9 full-time staff positions were eliminated in FY2016. Of these, 5 were directly related to grant funding which ceased at the end of the fiscal year. Additionally, one full-time opening was not filled. In an organization of our size (approximately 80 FTE) this is an appreciable difference. Our staff have reached a critical juncture where we can no longer take on additional projects without abandoning current ones.

Integral to nearly all of our endeavors is information technology (IT). Our IT staff employs cutting edge technology to support administrative, accounting, delivery and telecommunications functions, as well as the SHARE Consortium. In FY2016 they kept one eye on the benefit of improved equipment, services and supplies with the other eye on potential cost savings. The IT staff have integrated much of our day-to-day work into Office365. A great deal of this data is stored in the cloud, which makes backing up computers and all our communication quite a bit easier.

In addition to ongoing support, IT staff were instrumental in the development of a new feature in our delivery department. Our delivery team is eagerly embracing new technology for their routes in the form of iPads used to collect delivery-related data. Each morning, route information is downloaded to an iPad, which assists a driver along the route. At the end of a route, all data is transferred to the delivery database. As our delivery staff move forward utilizing technology, they have automated a task that formerly required many hours of manual input every day.

Our focus on membership support is a balancing act between administrative duties and engagement. A continual task is the refinement of membership lists and this year we focused on academic agencies with campuses in multiple locations, as well as the addition of two new school districts. In tandem with our colleagues at the ISL, our membership staff worked with libraries to ensure completion of the Interlibrary Loan Traffic Survey as part of the annual certification process. An analysis of survey results can yield quite a bit of information regarding resource sharing trends in Illinois.

The most significant improvement in this area is our increased ability to engage with membership. IHLS participated in more networking activities and met with special interest



groups this past fiscal year. Our ability to reach out to membership has been bolstered by the following language recently added to the Illinois Administrative Code Rules:

The system shall designate staff to provide consulting and continuing education assistance to member libraries in understanding and complying with applicable State statutes and administrative rules and with the system's bylaws, policies and plan of service.

23 Ill. Adm. Code 3030.270 (d) (1)

In keeping with the movement to streamline an already streamlined library system, the IHLS Accounting and Human Resources departments were combined near the end of the fiscal year. This action included a reduction in force, and realignment of duties.

Other notable accomplishments for FY2016 include:

- Submission of all required reports to the Illinois State Library on time
- Annual audit submitted with a clean report from the independent auditing firm
- FY2016 budget submitted, then reconfigured and resubmitted, as a result of the Illinois budget crisis
- Satisfactory completion of the first year using Abila accounting software
- Streamlined financial processes and procedures, based on significant data analysis
- Improved accounts receivable accounts and procedures
- All customer records updated

IHLS initiated a long range planning process in FY2015 with much of the member input completed by June 2015. The following month (July), IHLS board members and administrative staff met for two consecutive days to take the considerable feedback from focus groups and surveys and mold it into a mission, vision, values and goals that would serve the organization for the next several years. The draft language was shared with members to solicit feedback, and the plan was approved October 2015. Simply stated, our vision is:

Illinois Heartland Library System (IHLS) empowers libraries to embrace innovation and collaboration.

The mission reflects the same spirit:

To support member libraries of all types in providing quality library services. IHLS facilitates access to shared resources, advocates for libraries, promotes innovation and develops community partnerships.

The funding challenge we faced in FY2016 does not diminish the importance of an updated long-range plan. However, it does require IHLS to seriously consider its' focus during a period of reduced funding. We cannot develop activities to support all goals in the new plan with limited staffing resources and in a climate of fiscal instability. The beauty of the plan will



demonstrate itself in a few years when we are again able to address the many goals it encompassed.

Bibliographic Access

The priorities for cataloging staff continues to be providing services for SHARE member libraries, providing cataloging training, and maintaining the Cataloging Maintenance Center (CMC).

With an eye toward maintaining cataloging services to SHARE member libraries at an affordable rate, SHARE Bibliographic Services staff introduced a new level of cataloging service to member libraries, commonly known as the “\$3 bib”. The member library staff do the background work—find a bibliographic record in OCLC they believe matches the item in their hand—send all information about the item (author, title, copyright date, number of pages, ISBN number, and so on) and the matching OCLC record number to SHARE cataloging staff electronically. If the SHARE staff member agrees, the record is imported from an OCLC application to the SHARE database for the member library. In addition to saving money for member libraries, and SHARE staff time, it is not necessary to send the item to one of the IHLS offices, and member library staff learn more about cataloging and the importance of accurate database records.

SHARE Bibliographic Services staff have implemented online instruction and recorded video instruction to save time and travel for both SHARE staff and member library staff. Further research and planning are underway to expand this form of instruction.

In addition to original cataloging of local history and genealogy items sent to CMC catalogers by libraries from all parts of the state, CMC staff have spent countless hours transcribing and cataloging items from the Chicago Botanic Gardens, Illinois State Archives, Southern Illinois University Edwardsville, and the Meadville Lombard Theological Seminary Library for the Illinois Digital Archives. This work provides patrons across the state with information of an historical nature—filling a need for genealogical and historical research—that would otherwise be lost.

Resource Sharing

In FY2016 IHLS continued to grow its LLSAP (local library system automation program). With financial assistance from the Dream Grant, SHARE (Sharing Heartland’s Available Resources Equally), SHARE staff were able to assist 40 libraries through the process of going live on Polaris during FY2016, with 27 more working on barcoding their collections so they can go live during FY2017. An additional 10 libraries became full SHARE members during FY2015.

As a result of the significant growth in SHARE membership, member fees remained constant in FY2016 and FY2017.

A recent survey of SHARE members indicates that 97% are either satisfied or very satisfied with the consortium. Some of the comments offered about SHARE include:



- *Really enjoy all that share offers*
- *I appreciate all the small staff of SHARE does for our very large & diverse library community*
- *I like that when I call everyone seems friendly and helpful making me feel comfortable calling when I have questions or need help*
- *SHARE is an awesome resource for our small school library*
- *We need to seek public and private funding so we do not lose the great staff we have*
- *It is essential for me to have SHARE. I would not be automated or sharing resources without it*
- *The SHARE staff provide on-going support to us, and are continually working to improve offerings made to member libraries. I am impressed with the high level of dedication and enthusiasm the staff have, and appreciate all their efforts. The database functions smoothly 99.9999% of the time, which means I can focus on offering services to my patrons instead of trying to support a product. Thank you!*

We cannot mention Resource Sharing without highlighting eBooks! Starting with the eRead Illinois grant project, the Cloud Library consortium belonging to SHARE member libraries experienced significant growth during FY2016:

- We added 33 new libraries to the Cloud Library shared collection group in FY2016. The total number of library agencies now participating is 194 (153 public, 33 school, 5 academic, and 3 special library agencies).
- The total number of checkouts in July 2015 was 14,369. The total number of checkouts in July 2016 was 29,162. This is a 103% increase!
- Currently, we are circulating 1,000+ items per day, on average.
- Due to the transfer of content from two separate Overdrive Consortia in IHLS, the Cloud Library collection has more than tripled in size this year. It currently contains over 38,000 items.
- Over 6,000 patrons are actively using the Cloud Library each month now, and the number of new patrons signing in for the first time is still increasing each month on average.

SHARE is tech-y, and we ourselves sometimes forget how much new technology supports the consortium, not only from a social and practical standpoint, but also from a technical one. Here are some details incorporated within our structure:

- We maintain over 50 TeraBytes of disk space at our colocation space in Champaign. All our storage has fault tolerance so if a hard drive fails, it automatically alerts staff and continues functioning even with the failure.
- Clustered servers failover seamlessly in case of a hardware failure, assuring that even a server can be rebooted, or even crash, in the middle of the day and not affect a library's ability to connect to Polaris.



- 10-Gigabit backbone network connections. (This is the fastest you can get without going to fiber.)
- All accounts integrated with the Office365 Microsoft Exchange cloud service. While this could potentially allow us to provide all of the standard office suite to our libraries, we use it solely for authentication. This will allow many future benefits as we go forward.
- Our servers are getting smarter and smarter, as they alert staff when something is amiss. Using the latest version of Microsoft System Center, we monitor many different events across all our servers.
- We have the largest Polaris ILS (integrated library system) database in the world. No organization has more libraries and more settings than SHARE does. We are constantly pushing the limits of Polaris and its parent company (Innovative Interfaces Inc.) continues to meet our demanding requests.
- All calls that originate from the colocation to notify patrons of available holds on telephones, go across the Internet and we are not charged long distance.
- SHARE members connect to Polaris using state-of-the-art RemoteApp sessions. This allows members to connect using PC's, Macs, iPads, etc. even though Polaris technically only runs on a PC. The process of connecting to the RemoteApp software is a very complicated handshake that includes security, encryption, and compression of data.

Consulting and CE

The IHLS Staff conducted more than 122 site visits during FY2016 for reasons ranging from meeting with new library directors, to attending regional networking meetings and everything in-between. Each of these visits provide opportunities for making connections with our members and a “real time” glimpse of what is going on with our libraries. It also gives members a personal connection with staff that always enhances communication.

Our second annual Member Day was held in October at St. Anthony's Grade School in Effingham with at least 124 attendees. We were also pleased to host sessions in the spring on Autism Spectrum Disorder that attracted 27 attendees.

Whether conducting a SHARE training or attending a networking group, L2 tells us that IHLS staff can document at least 1,396 contact hours with our membership.

Delivery Services

With an eye to the future of the state of resource sharing where every patron deserves to have quick, efficient delivery no matter where they live, we began looking at our routes across the hubs. We realized, with the help of LASA (Laboratory of Applied Spatial Analysis, Southern Illinois University Edwardsville), we could challenge the status quo that it was impossible to provide functional 5-day a week service to our entire membership. What a wonderful surprise when LASA delivered their final report indicating not only was it possible, it was possible in an 8- to 9-hour day! LASA utilized our member data regarding locations and hub locations to



create routes that allow us to serve every member library, every day if necessary. LASA also included “filters” such as a 54-tub limit in our delivery fleet at any one time, and accounting for delivery daily to every library. Armed with their results, we set about creating that reality. We changed hub boundaries, shifted positions and set our eyes on a July 1, 2016 target date for implementation.

IHLS also began the process of implementing the use of iPads for all of the drivers’ paperwork. We save inputting hours daily with the utilization of iPads on delivery routes. The iPads will also “share” their data with our website to create our route lists online and as a result, those lists will always be up-to-date.

IHLS takes the Statewide Delivery Committee recommendations to heart. We recognize the effort and time that went into creating those recommendations as the foundation for forming standard delivery systems across the state. In FY2016 one recommendation we focused on was more access to our member libraries outside of the hours they are open. This is crucial for delivery to be able to run as efficiently as possible. Every minute, every stop, every load has to be done at the most efficient level possible. Everything counts toward cost. By having more access to libraries, delivery does not have to pause while someone is on their way to the library to open it, nor does delivery have to wait for the janitor to come from the other end of the building to let them in. We appreciate the cooperative spirit our members embrace regarding materials delivery.

To that end, we have an online form for libraries to fill out to alert us when they do not want delivery. Since we always have access, there might be times the library does not want us to deliver. The form alerts the correct hub manager when a library has requested no delivery. We have implemented the RAILS (Reaching Across Illinois Library System) delivery help desk ticketing system for our member libraries. This allows IHLS to be able to respond and have a written record of everything from an issue to a compliment from member libraries.

Another Statewide Delivery Committee recommendation was to implement CDPs (Community Delivery Partnerships). IHLS has been proactively promoting CDPs to our members. Recently we had a new CDP form between Vespasian Warner Public Library (Clinton) and the Clinton Unit School District #15. When the public library first approached the school about creating a partnership, Vespasian Warner Public Library learned the district did not have the means or staff to retrieve their items from the library. Vespasian Warner decided their staff member who picks up mail daily would simply deliver those items to the school. The school now receives delivery 5 days a week instead of their previous 2 days a week delivery. That is exactly what CDPs are about--sharing a drop point so that all can receive more delivery and allowing delivery to run more efficiently with less stops but more service.

Another large part of delivery was the decision to partner with RAILS (Reaching Across Illinois Library System) to submit a proposal for an RFP crafted by University of Illinois for administration by CARLI (Consortium of Academic and Research Libraries in Illinois) for the ILDS



(Illinois Library Delivery System) route which connects 141 academic library members and 2 library system hubs. IHLS realized that in the economic environment of Illinois, it would not be possible for us to sustain a delay in payment if we responded to the RFP alone. It made sense to partner with RAILS, in a sub-contractor role.

This prospect has afforded many learning opportunities. The foremost learning opportunity is how two library systems, with different cultures, work together for the good of libraries across the entire state. What does that look like? How are resources pooled and shared to accomplish the goal of delivering statewide? IHLS is thrilled to have the opportunity to provide delivery to all of our academic library members. It makes financial sense to have the ILDS stops handled by systems. The implementation date was the same as IHLS' implementation date for functional 5-day a week service--July 1, 2016.

Delivery in IHLS is alive and thriving even in these unstable economic times. So often innovation rises out of tough times, and we will continue to look at innovative methods to improve our delivery service to members.

IMSA (Illinois Machine Sublending Agency) Services

FY2016 was a challenging year for our IMSA project located in our Du Quoin office. The manager resigned in September 2015. The position was filled internally by the Patron Services Coordinator, who had been with the organization for a little over one year. While the department began the year with five full-time staff, because of budget uncertainty, they functioned through three-quarters of the year with only four staff members.

In January 2016, the IHLS board was notified full funding would be awarded in support of IMSA for FY2016, but that no funding would be forthcoming after that. Because IHLS could not afford to carry that program, the decision was made to move the program back to the Illinois State Library.

At that point, the IMSA staff had three areas of focus:

- Continuation of their work with the machines
- Planning and implementing the transition of the program to the Illinois State Library
- Ready themselves for job seeking

The staff did a commendable job on the first two points and IHLS staff worked diligently to assist them with the third.

As is probably obvious, IMSA services were maintained under very stressful conditions, and was one of the forces that led the IHLS board to the development of a severance plan for any employee that would be leaving the system due to a reduction in force.



Conclusion

The opportunity to reflect on the past year is appreciated, even though our fifth year as an organization presented several challenges. If adversity builds character, our sixth year as a mega library system should be the best yet! Goals for FY2017 include a continued focus on engaging members in new spaces (electronic and in person), expanding resource sharing throughout our IHLS membership, rebranding the organization and supporting our board as it weaves itself into the fabric of the larger community. The last two goals may well define our future course: in developing partnerships with public and private organizations in our service area we will look beyond our current funding boundaries and new opportunities will appear.