

## February Activities for March Board Meeting

### IHLS Monthly Staff Report Tying Our Activities to the ISL Priorities

- ✓ *Indicates this month's staff activities.*

#### 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.
  - ✓ ***conducted SHARE member vote on Governing Document, Cataloging Best Practices, Problem Resolution for Bibliographic Services, and the Circulation and Resource Sharing policy.***
2. Promote the resource sharing capabilities of the LLSAP to all member libraries.
  - ✓ ***Met with the White Hall Township Library Director and Board of Trustees to review their resource sharing options, as well as the advantages of joining SHARE.***
3. Provide training on how to effectively use tools for interlibrary loan beyond the LLSAP using OCLC and other appropriate discovery services. These FirstSearch classes are available to all system members and include reciprocal borrowing and access topics: FirstSearch Searching: Searching the Databases Like an Expert; FirstSearch Administration: The Basics. System members with full OCLC membership are encouraged to take the FirstSearch Interlibrary Loan class which includes a focus on copyright compliance.
  - ✓ ***Continued to answer questions by phone and email on WorldShare ILL.***
  - ✓ ***Wrote WorldShare Watch articles for the IHLS Newsletter.***
  - ✓ ***Did one site visit to Lincoln High School to instruct librarian on how to set up and use her WorldShare ILL account.***
4. 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.
  - ✓ ***Created Offline circulation video for Polaris 4.1R2 upgrade.***
5. Ensure that library staff understand the responsibilities for handling interlibrary loan materials.
  - ✓ ***Continued the cleanup of ILL out-of-state records. 174 records cleaned/created and 68 records deleted***
6. Continue support of statewide initiatives designed to expand and enhance service to library patrons. This support will include the involvement of system staff, information dissemination as well as updated or new training opportunities for staff of member libraries.
  - ✓ ***Participated in a web conference with representatives from Northern Wisconsin libraries who are in the process of exploring the feasibility and desirability of merging their respective shared ILSs. SHARE staff answered questions about governance, policies, technology, training, delivery, cataloging, circulation, etc.***

SHARE Statistics							
	Circulation	ILL	Reciprocal Borrowing	Pac Searches	Holdings	Bibs	Patrons
April 2013	770,817	61,818	48,513	661,126	8,953,361	1,910,883	790,049
May 2013	743,549	114,430	61,942	1,100,785	8,942,050	1,920,634	784,283
June 2013	814,417	184,940	65,891	661,566	8,981,075	1,905,087	788,023
July 2013	850,892	138,641	68,960	644,208	8,991,402	1,928,106	784,028
August 2013	790,258	139,555	61,543	652,256	8,995,814	1,929,231	798,119
September 2013	885,916	141,666	60,944	696,999	9,021,461	1,935,716	800,708
October 2013	943,153	154,268	66,625	707,758	9,046,157	1,935,157	802,871
November 2013	831,585	135,707	58,710	623,768	9,066,327	1,934,896	804,875
December 2013	719,734	120,643	51,533	557,802	9,062,746	1,931,142	807,509
January 2014	827,562	143,710	60,069	692,094	9,061,364	1,937,559	808,450
February 2014	802,661	140,364	55,648	650,213	9,058,711	1,884,609	805,634

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

**Activities:**

1. Evaluate current LLSAP policies and develop uniform policies for SHARE with the SHARE Executive Committee. Analyze trends in data and in the library marketplace to determined opportunities for changes and enhancements of LLSAP Services.
  - ✓ **SHARE member libraries voted on adopting the proposed Governance document, Cataloging Best Practices, Problem Resolution for Bibliographic Services, and the Circulation and Resource Sharing policy**
2. Participate in the Statewide E-Books Grant opportunity by implementing a SHARE 3M Cloud available to all SHARE members. Non-SHARE members will have the opportunity to participate in the Baker & Taylor Axis 360 consortium supported by RAILS.
  - ✓ **Six new libraries began participation in the 3M Cloud Library shared collection on February 1, 2014 (Four public, one school, and one special).**
  - ✓ **1,576 unique patrons accessed the 3M Cloud Library shared collection and 4,664 e-books were circulated in the month of February.**
  - ✓ **487 items were added to the collection this month including multiple copies of popular titles, patron requested wish list items, and newly released popular titles.**
  - ✓ **The E-book Trainer/Coordinator provided five virtual training sessions instructing appropriate library staff members on how to use the 3M Shopping Cart to select items for purchase. Eighteen staff members attended these trainings.**
  - ✓ **Preparations were made to start offering IHLS Petting Zoo Training sessions in the month of March.**
3. Hire an E-Book Trainer/Coordinator utilizing grant funds and provide additional administrative assistance to support the Statewide E-Books Grant opportunity.
  - ✓ **Completed October. 2013.**
4. Promote, as resources allow, new membership in the SHARE LLSAP. Promote the benefits of membership in the SHARE LLSAP through the following lev3els: Full, Transitional, Affiliate and CARLI Affiliate. Transitional and Affiliate members request materials through the SHARE PAC (public access catalog) by using an institutional membership library account, and receive delivery of materials through the IHLS courier service. Collections of Transitional and Affiliate

members are not available in the SHARE PAC and IHLS will continually consider opportunities to more fully involve these members in resource sharing.

- ✓ ***Weekly meetings were scheduled with the eRead Illinois Project Director (RAILS) to talk about important issues and to coordinate efforts for both the 3M Cloud Library and Axis 360 platforms.***
- 5. Continue to support the SHARE Helpdesk to track concerns and technical issues with the Polaris software.
  - ✓ ***Polaris had no unscheduled downtime in February.***
  - ✓ ***Helpdesk tickets continue to be monitored daily and assigned to appropriate staff.***
- 6. Provide software and technical support for members of the LLSAP.
  - ✓ ***IT staff have helped 4 libraries with filtering or bandwidth issue to improve their connection to the Polaris DB.***
  - ✓ ***IT staff has helped in the production of custom reports for the admin services team and the members.***
  - ✓ ***IT staff has performed many SQL updates to the Polaris DB system admin tables, to save many days of work for the admin services team.***

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

##### **Activities**

1. Support a Cataloging Center operation for the SHARE LLSAP members for copy and original cataloging for 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 material 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.
  - ✓ ***SHARE staff cataloged 1157 items for member libraries.***
2. Provide appropriate training for copy cataloging.
  - ✓ ***SHARE staff held cataloging workdays.***
  - ✓ ***SHARE staff held barcoding and Searching and Matching training sessions.***
  - ✓ ***SHARE staff held monthly cataloging training session.***
3. Evaluate the current methods utilized for ensuring the quality of the database through cataloging.
  - ✓ ***SHARE staff merged 394 duplicate bibs.***
  - ✓ ***SHARE staff corrected 678 bibs.***

#### **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,
  - ✓ ***Staff have fulfilled NACO requirements for the year.***
2. Continue support of LLSAP database cleanup efforts in Illinois.
  - ✓ ***CMC staff have been working with PALS on retrocon clean up.***

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

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

**Activities:**

1. Sort materials daily to ensure all materials are distributed during the next scheduled delivery.
  - ✓ **Done daily.**
2. Develop methods to deliver training to member libraries on labeling, packaging, and other preparation of library materials with the goal of improving delivery time.
  - ✓ **Delivery Tips are put out weekly in the SHARE newsletter as well as the Moving Forward Together newsletter**
  - ✓ **Created a public announcement on packaging and labeling.**
3. Continue to work collaboratively with RAILS to minimize size and type of tubs and other delivery containers and number of different routing slips used.
  - ✓ **Received information regarding the tubs that RAILS currently uses**

October 2013	Delivery picked up /delivered	ILDS Delivery Items to Hub	ILDS Delivery Items from Hub
Champaign	87,468	36,137	32,249
Decatur	99,781		
DuQuoin	74,748	15,840	18,082
Edwardsville	192,095	32,576	34,748

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

**Activities:**

1. Implement a replacement schedule for delivery vehicles for FY2015, with fleet replaced when mileage exceeds 200,000 miles.
  - ✓ **In the process of getting bids for FY14 vehicle replacements.**

**Priority: Talking Book Program**

**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 Carterville**

**Activities:**

1. Contract with the Illinois State Library to manage statewide services.
  - ✓ **Required monthly reports were submitted to the National Library Service.**
2. Serve all persons eligible for service within the state of Illinois as stipulated in the agreement with NLS.
  - ✓ **75 C1**
  - ✓ **92 DA1**
  - ✓ **114 DS1**
  - ✓ **Staff responded to 14 BARD inquiries during the month of February.**
3. 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.

- ✓ ***2/11/14 Participated in a monthly conference call for the planning of the Conference for Illinois Parents of Children with Vision Loss.***
  - ✓ ***2/20/14 Two staff members participated in an online training session for eRead Illinois to learn how to better assist Talking Book patrons who sign up to use the service.***
  - ✓ ***Participated in the monthly conference call with staff from the National Library Service.***
4. Ensure the efficient and successful provision of service in accordance with the Revised Standards and Guidelines.
- ✓ ***Filled all requests for machines and equipment within two business days of receipt.***
  - ✓ ***Responded to all BARD inquiries in a timely and efficient manner.***

**Priority: Provide timely and pertinent information to member libraries.**

**Goal: Communications among member libraries and partners.**

**Objective: Provide various mechanisms to ensure good communications among member libraries and partners**

**Activities:**

1. Visits to 15% of our more than 550 agencies would give IHLS staff the opportunity to arrange approximately 70 on-site visits. After a hiatus of almost three years from this valuable activity, a particular area of focus would be those library agencies that 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 that information from IHLS.
  - ✓ ***Ellen Popit visited Shiloh Grade School for system services review (February 21st).***
  - ✓ ***Ellen Popit and Chris Dawdy visited Centreville Public Library for system services review (February 21st).***
2. Maintain an interactive website to assist member libraries in effective utilization of IHLS services and promote member forums.
  - ✓ ***Updated and maintained website platform and modules.***
  - ✓ ***Created page for Unidentified Items for Operations department.***
  - ✓ ***Assisted Nominating Committee with ballot setup on Survey Monkey.***
  - ✓ ***Created Consulting Services survey on Survey Monkey.***
  - ✓ ***Updated website content for both IHLS and SHARE websites.***
  - ✓ ***Resolved problems with EZProxy server.***

**Priority: Administrative Activities**

**Goal I: 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.
  - ✓ ***Improve the accounts payable, accounts receivable and payroll processes to take further advantage of financial database software.***

2. Consolidate all IHLS administrative records to a single location for efficiency. Establish an administrative file structure that follows a record retention schedule set by the Illinois State Archives and provides remote access for staff at other locations.
  - ✓ ***Down to the last few boxes from Champaign being relocated to the Edwardsville office.***
3. Explore continued participation in the Plinkit Collaborative on the basis of revenue generation and member needs.
  - ✓ ***Met with the IHLS Plinkit team to discuss draft business plan and next steps.***
4. Develop a consulting service plan for implementation in a future service year utilizing constructive feedback from member libraries in concert with a long range plan.
  - ✓ ***To gather input for the consulting services plan, 8 interviews were conducted; 5 focus groups were held; Conducted a survey on Consulting with 123 responses; and Gathered information on IHLS Staff Expertise.***
5. Other initiatives:
  - ✓ ***Invested funds from sale of Decatur building and Edwardsville lots (2) into a money market account as per the Board of Directors.***

**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.
  - ✓ ***Scheduled a job fair with Lindenwood University @ Belleville campus.***
  - ✓ ***Hired consultant to lead the work of the accounting department***
2. Develop and implement a process to evaluate staff.
  - ✓ ***Performance evaluations are being sent to Executive Director for review. Next step is for managers to meet with employees.***
3. Develop and implement performance-based salary adjustments.
  - ✓ ***Employees will be assigned goals during their evaluation.***
4. Implement an enhanced hiring process.
  - ✓ ***All hiring procedures, excluding courier interviews are now handled by HR.***
  - ✓ ***Initiated exit interviews.***

**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 project**

**Activities:**

1. Provide administrative support.
  - ✓ ***Processed monthly fee and transactional billing.***
  - ✓ ***Streamlined accounts receivable reporting process.***