

**November & December 2013 Activities for January 2014 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. Assist member libraries in promoting their participation in reciprocal borrowing within IHLS and statewide.
  - ✓ *Provided information to non-SHARE members regarding their options for resource sharing.*
2. Promote the resource sharing capabilities of the LLSAP to all member libraries.
  - ✓ *Added three new libraries to SHARE (Shipman Elementary School, Frank Bertetti Benld Public Library, and Palestine Public Library).*
3. Support patron-initiated interlibrary loan for LLSAP members.
  - ✓ *Continued work on cleaning up ILL patron records.*
  - ✓ *An additional 432 new or clean records for ILL-out-of-state created with an additional 427 expired records deleted.*
4. 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.
  - ✓ *Continue to provide information on the migration from WorldCat Resource sharing to WorldShare ILL through email, phone conversations, articles in the Moving Forward Together, and onsite training.*
5. 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 has provided basic circ, advanced circ, barcoding, cataloging in Polaris, serials and acquisitions classes.*
  - ✓ *SHARE staff have developed a Reports class, which they will begin teaching in January, 2014.*
6. Respond to the work being done by the statewide Delivery and Interlibrary Loan Revision Committees by providing members with updated information and timely training in the areas of delivery, interlibrary loan, reciprocal borrowing, reciprocal access and copyright. It is anticipated that online and in-person formats will be incorporated to provide expanded educational opportunities for our multi-type members.
  - ✓ *Attended meetings of the Glossary and Best Practices working groups of the ILL Code Revision Committee and a December meeting of the ILL Revision Committee.*

7. Ensure that library staff understand the responsibilities for handling interlibrary loan materials.
  - ✓ *Reviewed and responded to a variety of emails and phone calls regarding lost or damaged ILL items.*

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

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

**Activities:**

1. Develop a mature Memorandum of Understanding/Agreement for all LLSAP participants.
  - ✓ *Done in July, 2013.*
2. Account for the reserve funds for each legacy LLSAP.
  - ✓ *Done in July, 2013.*
3. Evaluate the impact of the new uniform cost-sharing formula on all LLSAP members and consider a modified formula for FY2015.
  - ✓ *Policy and Fee/Finance Committee met to discuss the impact of current fees (and fee formula) on the SHARE budget, and considered options to make the two totals closer to equal.*
4. 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.
  - ✓ *Ongoing.*
5. 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.
  - ✓ *Soft opening of collection on October 15, 2013*
  - ✓ *Official launch of 3M collection on November 18, 2013*
  - ✓ *The e-book trainer/coordinator visited six libraries in November and provided seventeen live eM Cloud library demos. Two virtual sessions via Adobe Connect were also provided. Over 9 librarians and library staff members participated in these trainings.*
  - ✓ *481 e-book titles were purchased in the month of November, bringing the Opening Day Collection to a total of 3,060 titles.*

- ✓ *Three live training sessions were offered at Mascoutah Public Library on December 12, 2013 with five area library staff members attending to learn more about the 3M Cloud Library app and eRead Illinois project. Two additional sessions were offered in December via AdobeConnect with a total of 20 attendees.*
  - ✓ *The initial sign-up period to participate in the 3M Cloud Library shared collection was extended to January 3, 2014. Libraries may sign up at the beginning of each month during the first year of the project.*
  - ✓ *117 libraries have officially signed up to participate (11 school, 3 academic, 1 special, & 102 public).*
  - ✓ *As of December 31, 2013 the 3M Cloud Library shared collection contained 3,501 items. This number will continue to grow as the project moves forward.*
6. Hire an E-Book Trainer/Coordinator utilizing grant funds and provide additional administrative assistance to support the statewide e-books grant opportunity.
- ✓ *Done in October, 2013.*
7. Employ a variety of instructional methods to allow SHARE members to work effectively and efficiently with the ILS and other shared databases.
- ✓ *Continuing to use in-lab, in-hub training sessions, using the mobile labs to train off-site, using video recordings of training posted on the SHARE website, providing short task analysis documents (One Minute Lessons) posted on the SHARE website, providing electronic newsletters.*
8. Promote, as resources allow, new membership in the SHARE LLSAP. Promote the benefits of membership in the SHARE LLSAP through the following levels: 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.
- ✓ *Met with Marissa Public Library Board of Trustees to discuss advantages, procedures, and costs for joining SHARE.*
  - ✓ *Talked to several non-SHARE library directors to discuss advantages, procedures and costs for joining SHARE.*
9. Assist with migration of libraries who do not wish to continue to participate in the SHARE LLSAP.
- ✓ *Working with Lincoln College as they move to CARLi in January.*
  - ✓ *Received notification from Memorial Hospital Library.*
10. Continue to support the SHARE Helpdesk to track concerns and technical issues with the Polaris software.
- ✓ *Continue to respond to Helpdesk tickets daily.*
11. Continue to offer SHARE member libraries a special IHLS/SHARE group purchase price for common third-party database products (e.g., Gale, Ebsco, Library Ideas, World Book). Available products and pricing information will be funneled through SHARE staff to all SHARE members. Ordering and invoicing will be coordinated by SHARE staff, thereby providing an incentive to vendors. A 1% handling fee is assessed for cost recovery.
- ✓ *Have begun discussions with vendors for offers to be made for FY15.*
  - ✓ *Have forwarded information from vendors to library directors.*
12. Continue to provide a SHARE web site that includes links to training modules and support materials in a variety of formats.

- ✓ *Have worked on making improvements to the SHARE website, for easier access to more information.*
13. Provide software and technical support for members of the LLSAP.
- ✓ *SHARE staff continue to respond to telephone calls, emails, and helpdesk tickets.*
  - ✓ *IT staff continue to enhance our web applications to make the end user experience smooth and efficient.*
14. Investigate the possibility of producing bar code labels in-house for member libraries as a means of improving uniformity of symbology and reducing cost to members.
- ✓ *Opted to use ID Label, Inc., a company that has developed a barcode ordering protocol for IHLS members, beginning July 2013.*

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

**Activities**

1. Provide appropriate training for copy cataloging.
  - ✓ *Continue with monthly Cataloging Training sessions via AdobeConnect.*
  - ✓ *Continue to provide much one-to-one, group, and classes for basic cataloging, MARC coding and upgrading of low-level encoding OCLC records.*

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

**Activities:**

1. Continue support of LLSAP database cleanup efforts in Illinois.
  - ✓ *Continue to work with PALS on their OCLC reclamation work.*

**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.
  - ✓ *All library materials were sorted daily and ready for delivery the same day (DOGS) or the next day.*
  - ✓

November 2013	Delivery picked up /delivered	ILDS Delivery Items to Hub	ILDS Delivery Items from Hub
Champaign	10,579	31,372	33,357
Decatur	93,724		
DuQuoin	74,821	16,146	17,156
Edwardsville	176,858	30,004	31,115
October 2013	Delivery picked up /delivered	ILDS Delivery Items to Hub	ILDS Delivery Items from Hub

Champaign	10,881	29,842	32,677
Decatur	91,600		
DuQuoin	69,575	14,835	15,694
Edwardsville	174,615	28,860	30,491

**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.
  - ✓ *126 C1*
  - ✓ *150 DA1*
  - ✓ *270 DS1*
  - ✓ *Staff responded to 21 BARD inquiries during the months of November and December.*
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.
  - ✓ *11/1/13 One staff member attended a new employee orientation at the Illinois State Library in Springfield, IL.*
  - ✓ *11/5/13 Participated in a monthly conference call for the planning of the Conference for Illinois Parents of Children with Vision Loss.*
  - ✓ *12/3/13 Participated in a monthly conference call for the planning of the Conference for Illinois Parents of Children with Vision Loss.*
  - ✓ *12/4/13 Two staff members participated in an online meeting for Illinois Reader Advisors.*
  - ✓ *12/13/13 Participated in the Illinois State Library Talking Book and BrailleService Patron Advisory Committee conference call.*
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.
  - ✓ *A site visit was made on November 7, 2013 to [Opdyke-Belle Rive CCSD #5](#) in Jefferson County to discuss the possibility of membership. Application for membership would happen no sooner than later this spring.*
  - ✓ *Leslie Bednar and Ellen Popit met with board members and city officials in Centreville, IL to discuss the membership status of the Centreville Public Library on November 21, 2013.*
  - ✓ *A site visit was made on December 10, 2013 to [Morthland College](#) in Franklin County to discuss membership. Their application will be presented at the January, 2014 IHLS Board Meeting*
2. Convene Library Advisory Councils.
  - ✓ *The Membership and Grants Director met with the Advisory Council Chair on 11/13/2013 to plan a revitalization of the Advisory Council.*
3. Maintain an interactive website to assist member libraries in effective utilization of IHLS services and promote member forums.
  - ✓ *Updated and maintained website, installing software updates and making changes as needed*
  - ✓ *Assisted SHARE member libraries with printer issues*
  - ✓ *Assisted member libraries with domain registration and website issues*
  - ✓ *Made changes to EZProxy configuration as needed to support member library patron remote database access.*

**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.
  - ✓ *Completed four month financial statement.*
  - ✓ *Continuing OCLC Billing System Restructure*
  - ✓ *Workers Compensation Audit.*
2. Review the financial policies and procedures and adjust as necessary.
  - ✓ *Continued SHARE fee review for FY15.*
3. Explore continued participation in the Plinkit Collaborative on the basis of revenue generation and member needs.
  - ✓ *A draft Business Plan for Website Services has been drafted and is being reviewed by IHLS Plinkit staff.*
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.
  - ✓ *A framework and timeline for development of this plan has been written.*
  - ✓ *12 focus groups have been scheduled to gather input for the consulting plan.*