Illinois Heartland Library System

March Activities for April 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. Maintain non-resident borrower card purchase locations on IHLS Website.
   - ✓ *Survey of public library membership non-resident fees created and announcements sent out. Deadline to complete June 15, 2014.*
2. Promote the resource sharing capabilities of the LLSAP to all member libraries.
   - ✓ *Have conducted conversations and exchanged emails with non-SHARE libraries regarding the benefits of joining SHARE, especially in light of receiving a grant from the Illinois State Library.*
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.
   - ✓ *Continue to promote the new WorldShare ILL product from OCLC, fielding phone calls and emails on how to set up account, find their unique URL, and how to use.*
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.
   - ✓ *Conducted 35 classes, meetings, and forums, utilizing the mobile labs at libraries, Adobe Connect, v-Tel, as well as training labs at the IHLS offices.*
5. Explore the cost and capability of interoperability with libraries independent of the LLSAPs.
   - ✓ *Continued the clean up of out-of-state ILL records, 121 records created or cleaned and 109 deleted.*

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	692,213	9,058,711	1,884,609	808,450
February 2014	802,661	140,364	55,648	650,213	9,058,711	1,884,609	805,634
March 2014	886,973	153,957	61,457	727,703	9,065,928	1,884,067	803,207

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.
   - *Revised the MOU for transitional members, as a result of changes caused by obtaining the Resource Sharing grant.*
2. Act as legal and financial authority for SHARE.
   - ✓ *Presented first draft of SHARE FY15 budget to the IHLS Board of Directors.*
3. Account for the reserve funds for each legacy LLSAP.
   - ✓ *Distributed February SHARE financials to the SHARE Policy and Finance/Fees Committee.*
4. Evaluate the impact of the new uniform cost-sharing formula on all LLSAP members and consider a modified formula for FY2015.
   - ✓ *Presented proposed SHARE fees for FY2015 to the SHARE Policy and Finance/Fees Committee.*
   - ✓ *Presented proposed SHARE fees for FY2015 that were approved by the Policy and Finance/Fees Committee to the SHARE Executive Council.*
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.
   - ✓ *Five new libraries began participation in the 3M Cloud Library shared collection on March 1, 2014 (3 public and 2 school).*
   - ✓ *1,674 unique patrons accessed the 3M Cloud Library shared collection in the month of March and 5,214 items were circulated.*
   - ✓ *383 items were added to the collection including multiple copies of popular titles, patron requested wish list items, and newly released popular items.*
   - ✓ *The IHLS eRead Illinois E-book Trainer/Coordinator held 4 virtual training sessions regarding the basic use of the 3M Cloud Library app and using the 3M Shopping Cart. Ten library staff members from participating libraries attended these sessions.*
   - ✓ *Four Technology Petting Zoos were held at participating libraries to give staff members a chance to become familiar with various devices and the 3M Cloud. 31 staff members attended.*
   - ✓ *Ongoing conversations with 3M and Polaris regarding filtering out adult content for school libraries were held this month with the hope of implementing a solution in April or May.*
6. 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.

✓ *Added one new transitional member (Vance Township Library).*

7. Continue to support the SHARE Helpdesk to track concerns and technical issues with the Polaris software.

    ✓ *IT Staff continue to monitor and resolve issues. The IT Staff closed ~79 tickets that were entered into the helpdesk system. Many other calls came in that didn't get recorded in the system.*

8. 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.

    ✓ *Presented offers from GALE for public libraries, EBSCO for public and school libraries; Mango Languages for all library types.*

9. Continue to provide a SHARE web site that includes links to training modules and support materials in a variety of formats.

    ✓ *Information is added to the website daily.*

10. Provide software and technical support for members of the LLSAP.

    ✓ *IT Staff are called upon by many library staff and IT professionals to assist in troubleshooting issues.*

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.

    ✓ *Cataloged over 1200 items for member libraries.*

2. Provide appropriate training for copy cataloging.

    ✓ *Hosted several workdays that allow libraries to work individually with SHARE BS staff on cataloging issues.*

    ✓ *With the SHARE Bib and Cataloging Standards Committee, reviewed training and what is essential for catalogers.*

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

   Activities:

1. Prepare Resource Description and Access (RDA) best practice guidelines for information resources in all formats and make them available via WebJunction.

    ✓ *Worked on the second draft of this document.*

2. Fulfill NACO (Name Authority Cooperative Program of the PCC) obligation by creating a minimum of 100 name or uniform title authority records per year.

    ✓ *Created 12 NACO authority records.*

3. Continue support of LLSAP database cleanup efforts in Illinois.

    ✓ *Worked with 2 LLSAPs to determine which files will be needed for cleanup.*

4. Develop two cataloging workshops to be made available in an online format.
   - ✓ *Checked with the State library concerning what format these workshops should be in.*

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 of our hubs are compliant with this.*
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.
   - ✓ *Working on a "Welcome to Delivery" packet.*

March 2014	Delivery picked up /delivered	ILDS Delivery Items to Hub	ILDS Delivery Items from Hub
Champaign	164,510	40,188	34,626
Decatur	115,887		
DuQuoin	81,012	17,289	20,470
Edwardsville	202,426	35,009	37,348

Objective B: Leverage existing delivery resources.

Activities:

1. Evaluate the current delivery routes for delivery efficiency.
   - ✓ *Have begun to map out current routes, will evaluate.*
2. Implement a replacement schedule for delivery vehicles for FY2015, with fleet replaced when mileage exceeds 200,000 miles.
   - ✓ *Replacing 4 courier vans, 2 staff vehicles.*

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.*
   - ✓ *Obtained extension from the Illinois State Library for LSTA grant funding third quarterly report.*
2. Serve all persons eligible for service within the state of Illinois as stipulated in the agreement with NLS.
   - ✓ *C1-83*

- ✓ *DA1-87*
- ✓ *DS1-167*
- ✓ *Staff responded to 19 BARD inquiries during the month of March.*

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.
- ✓ *3/4/14 Participated in a monthly conference call for the planning of the Conference for Illinois Parents of Children with Vision Loss.*
- ✓ *3/8/14 Participated in the conference for Illinois Parents of Children with Vision Loss.*
- ✓ *3/11/14 Gave presentation of Illinois Talking Book and Braille Service to Perry County Historical Society.*
- ✓ *3/13/14 Participated in online training session for eRead Illinois to learn how to better assist Talking Book patrons who sign up to use the service.*
- ✓ *3/21/14 Participated in Illinois Talking Book and Braille Service Director's meeting in Springfield, Illinois.*

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 2 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.
- ✓ *On March 11th, Ellen Popit met with prison librarians at John A. Logan College to discuss system membership and system services.*

2. Maintain an interactive website to assist member libraries in effective utilization of IHLS services and promote member forums.
- ✓ *Maintain and update IHLS and SHARE websites.*
- ✓ *Reconfigure delivery route pages to allow searching.*
- ✓ *Made updates to the CMC page on the website.*
- ✓ *Added new OCLC ILL section to website.*
- ✓ *Created board elections survey.*

3. Utilize web conferencing tools to support member communications such as Connect with Leslie which uses the Adobe Connect platform.
- ✓ *We are evaluating other platforms for video conference as well. Products like Zoom offer integration with H.323 services like our video conferencing system.*

4. Investigate feasibility of membership web portal to consolidate information that is relevant to each member.

✓ *With the award of the grant, there is a position slated to fill this vacancy and develop this platform.*

5. In the event that the Decatur IHLS office is closed, the video conference equipment will be surplused and offered to our member libraries. The equipment at the Decatur facility is approximately 7 years old, and is not compatible with the newer H.323 standards. The screens are older style tube/CRT televisions and cannot support the higher resolution needed to clearly see screen sharing sessions from across the state. If an alternate location is found for staff in the area, then newer and more space-effective equipment would be recommended.

✓ *This is complete.*

6. The Carterville office still has its old video equipment that has not been used since the Illinois State Library offered grants to purchase new equipment. The old equipment will need to go through the surplus process for the equipment we will not repurpose in the organization.

✓ *This equipment has been surplused. It is slated to be recycled.*

Priority: Administrative Activities
Goal I: Ensure effective utilization of IHLS resources
Objective A: Ensure fiscal accountability

Activities:

1. Explore continued participation in the Plinkit Collaborative on the basis of revenue generation and member needs.

✓ *Participated in two meetings of the Plinkit Steering Committee.*

2. Develop a consulting plan for implementation in a future service year utilizing constructive feedback from member libraries in concert with a long range plan.

✓ *Six Focus Groups were held.*

✓ *Began the analysis of the information gathered by the interviews and member survey. Report and plan targeted for completion by mid-April.*

3. Maintain IT support for IHLS staff, including support of videoconferencing, AdobeConnect, computer and server support.

✓ *IT staff are contacted on a regular basis for support of these services.*

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.

✓ *Attended job fair at Lindenwood University, Belleville, Illinois.*

✓ *Recruited, conducted interviews and selected a new IMSA Manager.*

✓ *Currently in selection process for CFO. Received 52 resumes, 12 had phone screens and 4 are scheduled for interviews April 21, 2014.*

2. Develop and implement a process to evaluate staff.

✓ *Managers have completed employee evaluations, Executive Director is reviewing. Once complete, managers will meet with employees to assign goals.*

3. Seek and encourage participation in continuing education opportunities for staff as appropriate.

✓ *It is our hope that WebJunction Illinois will continue the Lynda.com project.*

4. Provide one all-staff training retreat focused on staff collaboration and customer service.

✓ *Secured and confirmed an all staff retreat for 6/20/2014 in Effingham, Illinois.*