Illinois Heartland Library System

May Activities for June 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.
   - ✓ *Met with representatives of about 30 libraries to discuss resource sharing by participating in SHARE and other consortia.*
2. Maintain non-resident borrower card purchase locations on IHLS Website.
   - ✓ *Continued to monitor the Non-Resident survey results and update the IHLS website weekly.*
3. Promote the resource sharing capabilities of the LLSAP to all member libraries.
   - ✓ *May 1st/Litchfield High School: Chris Dawdy and Ellen Popit presented the "Growing Resource Sharing in IHLS through Growing SHARE" grant to representatives of 9 different library agencies. (5 school districts and 4 public libraries)*
   - ✓ *May 1: Chris Dawdy met with representatives of the North Greene School District to discuss the advantages of joining SHARE.*
   - ✓ *May 5th/Olney Public Library: Chris Dawdy and Ellen Popit presented the "Growing Resource Sharing in IHLS through Growing SHARE" grant to representatives of 3 school districts.*
   - ✓ *May 8th/Marion Carnegie Library: Chris Dawdy and Ellen Popit presented the "Growing Resource Sharing in IHLS through Growing SHARE" grant to representatives of 10 library agencies (4 school districts, 5 public libraries, 1 academic institution).*
   - ✓ *May 12th/Helen Matthes Public Library: Chris Dawdy and Ellen Popit presented the "Growing Resource Sharing in IHLS through Growing SHARE" grant to representatives of 4 school districts.*
   - ✓ *May 14: Chris Dawdy met with members of the Greenfield Public Library Board, to discuss the advantages of joining SHARE.*
   - ✓ *May 20: Chris Dawdy met with members of the Alton School District, to discuss the advantages of joining SHARE.*
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.
   - ✓ *There were 5 WorldShare ILL training sessions held in May with 37 librarians attending.*
   - ✓ *Two libraries were visited to provide individual instruction on WorldShare ILL.*

    ✓ *Numerous emails and phone calls were exchanged with the topic of WorldShare questions and issues.*

5. Explore the cost and capability of interoperability with libraries independent of the LLSAPs.
    ✓ *Continued the process of merging ILL Out-of-state records in Polaris with 144 clean records and 119 deleted records. The number of clean records includes new records that were requested by SHARE Member libraries.*

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
April 2014	847,678	150,545	57,731	637,041	9,035,531	1,886,715	802,743
May 2014	736,0914	129,779	58,784	651,784	,9,027,758	1,886,611	795,877

Objective B: Provide a framework for members to participate in a state-of-the art integrated library system
Activities:
1. 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.
    ✓ *At the end of May, we have 135 member libraries participating in the 3M Cloud consortia.*

2. 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.
    ✓ *At the end of May, we have 43 transitional members.*

3. 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.
    ✓ *Chris Dawdy has been working on gathering and sharing information on eResource proposals for FY15.*

Objective C: Ensure the integrity of records.
> **Activities**
> 1. Maintain the requirement that all bibliographic records must be OCLC-derived records and have an OCLC control number to ensure database standards and mitigate duplicate records.
>> ✓ *Corrected 1601 and merged 608 bibliographic records in the SHARE Database.*
> 2. 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 1834 items for member libraries.*
>> ✓ *Cataloged 166 items for new SHARE members who recently joined SHARE (Palestine Public and Blue Ridge Township Library).*
> 3. Provide appropriate training for copy cataloging.
>> ✓ *Hosted Cataloger's Training Session and SHARE Chat.*
>> ✓ *Provided 4 Connexion Workshop days and 2 Searching and Matching Classes*
>> ✓
> 4. Evaluate the current methods utilized for ensuring the quality of the database through cataloging.
>> ✓ *SHARE Bibliographic and Cataloging Standards Committee met to discuss policies.*

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.
>> ✓ *Continue work on the guidelines 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.
>> ✓ *8 Name Authority records were created during the month.*
> 3. Continue support of LLSAP database cleanup efforts in Illinois.
>> ✓ *Loaded the first of the files from the IHLS OCLC retroconversion, which included 9,388 records that needed the OCLC number inserted into the bibliographic record.*
> 4. 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 assisting with projects as agreed upon.
>> ✓ *Attended a meeting with ILS staff, concerning possible initiatives in the next fiscal year.*

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:**

Mayl 2014	Delivery picked up /delivered	ILDS Delivery Items to Hub	ILDS Delivery Items from Hub
Champaign	115,589	31,982	31,283
Decatur	99,091		
DuQuoin	79,518	17,043	18,575
Edwardsville	190,328	33,462	30,573

Objective B: Leverage existing delivery resources.
   Activities:
1. Evaluate the current delivery routes for delivery efficiency.
   ✓ *Met with the Operations Managers and evaluated current libraries in their respective hubs*
   ✓ *Beginning August, will have switched some libraries around to different hubs to increase efficiencies and turnaround time of items*
   ✓ *Updated member list and indicated which libraries are already doing the community concept that ISL would like to see us do.*
2. Develop and implement improved hiring practices and training for courier drivers and sorters (to include best practices in customer service, driving safety, ergonomics, and the handling of library materials).
   ✓ *Gathered all materials pertaining to training of drivers that the previous systems had in order to create a new training program for the drivers/sorters*
3. Evaluate direct and overhead costs for sorting and delivery.
   ✓ *Accounting is gathering all the financial information needed to give us a cost of operation by hub*

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.
   ✓ *C1 - 18*
   ✓ *DA1 - 81*
   ✓ *DS1 - 157*
   ✓ *Staff responded to 17 BARD inquiries during the month of May.*
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.

- ✓ *May 4th - 10th attended National Library Service for the Blind and Physically Handicapped conference in Oklahoma City, Oklahoma.*
- ✓ *Interviews for open Machine Clerk position were conducted. Cindy Nelson was hired. Her starting date was scheduled for June 2, 2014.*
- ✓ *May 28th - Participated in monthly National Library Service for the Blind and Physically Handicapped nationwide 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 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.
- ✓ *May 21st: Ellen Popit conducted a site visit at the Pinckneyville Public LIbrary with the newly hired director.*

2. Maintain an interactive website to assist member libraries in effective utilization of IHLS services and promote member forums.
- ✓ *Maintained and updated IHLS and SHARE websites*
- ✓ *Assisted SHARE libraries in setting up new receipt printers*
- ✓ *Renewed member library domain registrations*
- ✓ *Provided SHARE executive council vote survey results to Policies and Finance/Fees Committee*
- ✓ *Finalized SHARE Barcoding buddy & SWAT team MOUs*
- ✓ *Assigned first SHARE Barcoding buddy. Carlinville Public Library will be assisting Frank Bertetti Benld Public Library.*
- ✓ *Assisted with TMQ Batchload cleanup in Polaris*
- ✓ *Assisted with setup of phones with switchover to single phone 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.
- ✓ *Reduce time constraints for payroll processing by processing payroll 1 day early (on Tuesday).*
- ✓ *Analyzed/audited several general ledger cash accounts recorded and posted missing transactions.*

2. Implement new accounting software to achieve improved financial record keeping.
   - ✓ *Evaluated and analyzed 4 accounting software and 4 human resources/payroll packages.*
3. Explore continued participation in the Plinkit Collaborative on the basis of revenue generation and member needs.
   - ✓ *Communications were sent to all Plinkit libraries about changes to the program. This included information about a product from Enfold Systems Inc. called ESP.*
   - ✓ *Conducted a survey of Plinkit libraries to determine their interest in ESP*
4. Develop a consulting plan for implementation in a future service year utilizing constructive feedback from member libraries in concert with a long range plan.
   - ✓ *A report on this activity was submitted to Leslie, Ellen and Chris April 15, 2014. Included with the report was a consulting plan, Continuing Education plan, and Communication suggestions.*

Objective B. Employ qualified, professional, accountable staff.
   Activities:w
1. Develop and implement a process to evaluate staff.
   - ✓ *85% of employees have had their 1:1 meeting with their supervisor.*
2. Implement an enhanced hiring process.
   - ✓ *Currently recruiting for IMSA Service Patron Coordinator and IT Specialist*
3. Provide one all-staff training retreat focused on staff collaboration and customer service.
   - ✓ *All staff Retreat scheduled for 6/20/2014*