



June Activities for July 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.
 - ✓ IHLS Website has been updated with the current information on non-resident borrower cards. A report on the changes was written.
2. Promote the resource sharing capabilities of the LLSAP to all member libraries.
 - ✓ Met with librarians at Atwood-Hammond schools, Gilman-Danforth schools, the Royalton Public Library Board of Directors, East Alton-Wood River High School staff to discuss the benefits of joining the SHARE automation consortium.
3. Support patron-initiated interlibrary loan for LLSAP members.
 - ✓ Resource Sharing Specialist visited with Mary Towner of the Urbana Free Library June 16th for a demonstration of the integration of Polaris and OCLC to provide for Patron-initiated ILL. The information gathered was written in a report that was shared with the SHARE Managers.
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.
 - ✓ 8 site visits were made and 18 librarians were trained on how to use WorldShare ILL.
 - ✓ Information and instructions for migration to WorldCat Discovery were developed and mounted on the IHLS Resource Sharing Page.
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 staff conducted 13 classes, including Basic and Advanced Circ, Searching and Matching, Barcoding in Polaris, Cataloging, using a variety of instructional venues and techniques, including hands-on in a computer lab at a system office, on-site at libraries, Adobe Connect, and v-tel. SHARE staff conducted 7 SHARE Chat sessions via Adobe Connect, with an average of 22 library staff members participating each session.
 - ✓ Instructions were developed for Best Practices of Handling OCLC Interlibrary Loan materials in the SHARE/ Polaris database. These instructions were mounted on both the Share website and the IHLS Website.
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 membership.

- ✓ To assist member libraries, instructions for how to gather statistics needed for the ILLINET ILL Survey from the State Library were created. The instructions include information for the SHARE/Polaris database and OCLC ILL Stats.
- ✓ Welcome to Delivery packet has been created as well as a pamphlet outlining what delivery is.

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	736,091	129,779	58,784	651,784	9,027,758	1,886,611	802,743
June 2014	822,888	125,101	65,477	788,302	9,003,233	1,883,498	797,887

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.
 - ✓ The SHARE Bibliographic and Cataloging Standards committee, the SHARE Circulation and Resource Sharing committee, and the SHARE Executive committee continue to meet to review policies and practices.
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.
 - ✓ At the end of June, 136 SHARE libraries are participating in the 3M Cloud Library shared collection.

- ✓ Patrons checked out 6,112 items from the 3M Cloud Library shared collection in June and 585 patrons accessed the collection for the first time.
 - ✓ Preparations were made this month to start offering Technology Petting Zoos and Basic 3M training to member libraries in July and August.
3. 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.
 - ✓ At the end of June, 2014, SHARE has 44 transitional members.
 - ✓ At the end of June, 2014, SHARE has 25 Affiliate members. Annual MOU's for SHARE Affiliate and CARLI Affiliate members were sent via email to eligible IHLS members.
 4. Continue to support the SHARE Helpdesk to track concerns and technical issues with the Polaris software.
 - ✓ IT Staff continue to work with the helpdesk to clear problem tickets promptly.
 - ✓ All SHARE staff continue to work to clear help tickets promptly.
 5. 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 \$40.00 handling fee is assessed for cost recovery.
 - ✓ GALE and EBSCO orders for FY15 were completed during June, 2014.
 6. 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 SHARE website almost daily.
 7. Provide software and technical support for members of the LLSAP.
 - ✓ IT Staff worked with SAM libraries to clear up some technical problems with connectivity and licensing.

Objective C: Ensure the integrity of records.

Activities

1. Maintain the requirement that bibliographic records must be OCLC-derived records and have an OCLC control number to ensure database standards and mitigate duplicate records.
 - ✓ Merged 960 bibliographic records that were possible duplicates in the SHARE database.
 - ✓ Corrected 11736 bibliographic records, 9338 of those included adding the correct OCLC number.
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 1673 items for member libraries, 122 of those "retrocon" cataloging for new SHARE members.
- 3. Provide appropriate training for copy cataloging.
 - ✓ Cataloging Training Session, as well as SHARE Chat sessions were provided this month.
 - ✓ Work with individual libraries through emails and phone calls is on-going.
- 4. Evaluate the current methods utilized for ensuring the quality of the database through cataloging.
 - ✓ SHARE Bibliographic and Cataloging Standards Committee has been having meetings to determine best policies and best practices. Joint discussions with Circulation Committee helps when additional input is necessary.

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.
 - ✓ Progressing.
2. Continue support of LLSAP database cleanup efforts in Illinois.
 - ✓ Worked on the first of the reports from TMQ for the SHARE OCLC retroconversion.
 - ✓ Continue working with RAILS libraries, in particular PrairieCat.
3. 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.
 - ✓ Participated in telephone conference concerning possible cataloging expertise needed for future grants.

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. Conduct quarterly counts of library materials and continue to refine the counting methodology.
 - ✓ Agreed upon the quarterly dates for counts across the state
 - ✓ Agreed upon the methodology to be used for these counts
2. Sort materials daily to ensure all materials are distributed during the next scheduled delivery.
 - ✓ All IHLS hubs are currently compliant
3. Develop methods to deliver training to member libraries on labeling, packaging, and other preparation of library materials with the goal of improving delivery time.
 - ✓ In the beginning stages of partnering with RAILS to create videos that members may use
4. Continue to work collaboratively with RAILS to minimize size and type of tubs and other delivery containers and number of different routing slips used.
 - ✓ We have shared our "SHARE" label with RAILS.



5. Evaluate the current delivery routes and adjust as needed to improve delivery efficiency using the fleet management system.
 - ✓ The current routes have been evaluated and in September, we will be seeking member input

June 2014	Delivery picked up /delivered	ILDS Delivery Items to Hub	ILDS Delivery Items from Hub
Champaign	119059	34553	34975
Decatur	90860		
Du Quoin	75633	16302	17143
Edwardsville	187294	30476	29383

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
 - ✓ DS1 - 117
 - ✓ DA1 - 89
 - ✓ Staff responded to 12 BARD inquiries during the month of June.
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.
 - ✓ June 12 - Attended Director’s meeting in Springfield.
 - ✓ June 13 - Attended Patron Advisory Committee meeting in Springfield.
 - ✓ June 16 - 20 - Attended KLAS conference in Boston, MA.
 - ✓ June 25 - 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. Maintain an interactive website to assist member libraries in effective utilization of IHLS services and promote member forums.
 - ✓ Updated website software
 - ✓ Updated staff pages with staff changes
 - ✓ Added plugin to Helpdesk allowing bulk delete of tickets
 - ✓ Assisted SHARE libraries with printer issues
2. In the event that the Decatur IHLS office is closed, the video conference equipment will be surplus 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.
3. 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 is complete.

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.
 - ✓ FY2014 Financial Transactions are being reviewed/prepared for audit.
2. Review the financial policies and procedures and adjust as necessary.
 - ✓ IHLS Accounting Procedures are being compared to RAILS .
3. In concert with Illinois State Archives, consolidate, archive, and or dispose of legacy and Implement new accounting software to achieve improved financial record keeping.
 - ✓ IHLS Accounting Staff will present new Accounting/HR System recommendation to the board.
4. Maintain IT support for IHLS staff, including support of videoconferencing, AdobeConnect, computer and server support.
 - ✓ The IT staff continues to work in a manner that supports all technology used by IHLS. The process of hiring an IT Specialist to fill a vacant position has started.

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.

- ✓ Recruited for IMSA Clerk, promoted internal candidate.
- ✓ Promoted internal candidate to Bibliographic Project Coordinator position.
- ✓ Promoted internal candidate for Circulations Specialist.
- ✓ Recruited and held interviews for IMSA Patron Service Coordinator position.
- ✓ Begin recruitment for IT Specialist position.
- 2. Develop and implement a process to evaluate staff.
 - ✓ All staff have completed 2014 evaluations and have 2015 goals assigned.
- 3. Develop and implement performance-based salary adjustments.
 - ✓ Reviewed and updated the Operations Assistance and Administrative Assistant positions to accurately reflect the current duties and responsibilities of the position.
- 4. Implement an enhanced hiring process.
 - ✓ Researched and secured a vendor for drug screens at all locations.
- 5. Provide training to staff in areas of management and content specific to their areas of responsibility.
 - ✓ Reviewed several demos for new financial/hr software
 - ✓ Currently developing a Supervisor 101 training for September/October
- 6. Seek and encourage participation in continuing education opportunities for staff as appropriate.
 - ✓ Resource Day was 6/12/2014 wherein employees could purchase life items at a discount.
 - ✓ IMRF workshop scheduled for July
- 7. Provide one all-staff training retreat focused on staff collaboration and customer service.
 - ✓ ALL Staff Day 6/20/2014 was a success.
 - ✓ Evaluation Results:
 1. Venue.....82% rated 4 stars or above
 2. Flow of the day.....84% rated 4 stars or above
 3. Speaker...90% rated 4 stars or above
 4. Visual Aids...50% rated 4 stars or above
 5. Learned something new....74% rated 4 stars or above
 6. Relevant content....83% rated 4 stars or above
 7. Food.....84% rated 4 stars or above