

## April Activities for May 2015 Board Meeting

### IHLS Monthly Staff Report

#### Tying our Activities to the ISL Priorities

##### 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.
  - participated in the SHARE Semi-Annual meeting, reviewing proposed changes to circulation and cataloging best practices and policies.
2. 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.
  - 15 classes were provided for member library staff
3. The 2014 revision of the ILLINET Interlibrary Loan Code and the expected revision of System Standards provide a valuable opportunity for outreach to our membership. In conjunction with the IHLS Resource Sharing Policy, these documents will clarify roles, responsibilities and benefits for all participants. The “Best Practices” and Checklist information that will be a part of the ILL Code revision rollout will be a significant help. There are occasions that will come as a matter of course during FY 15 that will allow us to review and/or provide training in this area.
  - SHARE trainings---as part of our grant (Growing Resource Sharing in IHLS through Growing SHARE) IHLS staff will have the opportunity to review ILL policies and procedures with new members. Contact with existing members will be made through other SHARE trainings. ILL review will be documented for each training.
    - Chris Dawdy met with representatives from Odin High School and Ramsey High School

<b>SHARE Statistics</b>							
	<b>Circulation</b>	<b>ILL</b>	<b>Reciprocal Borrowing</b>	<b>Pac Searches</b>	<b>Holdings</b>	<b>Bibs</b>	<b>Patrons</b>
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
September 2014	905,510	154,053	55,538	742,432	8,995,198	1,872,863	810,038
October 2014	919,651	163,798	55,769	879,563	9,009,041	1,828,813	811,636
November 2014	774,715	131,037	48,673	757,958	9,019,234	1,830,868	814,280
December 2014	730,911	130,580	48,792	613,143	9,009,264	1,841,676	805,018
January 2015	858,769	155,127	57,008	735,170	8,991,006	1,839,988	804,899
February 2015	790,917	145,355	52,047	687,870	9,001,314	1,843,721	804,008
March 2015	863,377	159,912	56,228	1,560,054	9,010,811	1,835,452	803,628
April 2015	811,727	148,130	52,698	1,815,939	9,023,056	1,840,633	807,234

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

**Activities**

1. Act as legal and financial authority for SHARE.

- worked on the FY16 SHARE budget, and member fees, with presentation of both to the SHARE Fee/Finance/Policy Committee, the SHARE Executive Council, and at the SHARE Semi-Annual meeting
2. Evaluate the impact of uniform cost sharing on all LLSAP members and consider a modified formula for FY2016.
    - presented proposed FY16 fee formula to the SHARE Fee/Finance/Policy Committee, the SHARE Executive Council, and at the SHARE Semi-Annual meeting
  3. Continue the evaluation of current LLSAP policies and the development of uniform policies for SHARE with the SHARE Executive Committee. Analyze trends in data and in the library marketplace to determine opportunities for changes and enhancements of LLSAP Services.
    - initiated discussion about adding more substance to the SHARE governing document regarding standing committees
  4. Continue participation in the Statewide E-Books Grant opportunity.
    - As of May 1, 2015, 157 library agencies are participating in the 3M Cloud library shared collection (or 189 libraries).
    - The IHLS eBook trainer/coordinator presented the eRead Illinois technology petting zoo to approximately 30 participants at the Edwardsville Public Library staff development day. In addition 4 other technology petting zoos were provided at area libraries in the month of April with a total of 14 library staff members attending.
    - The total number of items circulated in April was 11,459, this is the third month we've gone over 11,000. 13,236 unique titles make up the collection.
  5. Employ a variety of instructional methods to allow SHARE members to work effectively and efficiently with the ILS, and other shared databases.
    - conducted three SHARE Local meetings, 15 training classes, attended one special interest group meeting
  6. Promote new membership in the SHARE LLSAP through the *Growing Resource Sharing in IHLS Through Growing SHARE* grant. IHLS will continually consider opportunities to more fully involve these members in resource sharing.
    - met with representatives from Odin High School and Ramsey High School
  7. Continue to support the SHARE Helpdesk to track concerns and technical issues with the Polaris software.
    - resolved and closed 163 help tickets in April

8. Continue to offer SHARE member libraries special IHLS SHARE group purchase prices 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 per database is assessed for cost recovery.
  - began FY16 negotiations with vendors

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

**Activities**

1. Maintain the requirement that all bibliographic records (with the exception of equipment, on order and E-book) must be OCLC derived records and have an OCLC control number to ensure database standards and mitigate duplicate records.
  - Merged and cleaned up 528 bibliographic records in the SHARE database.
2. Support a Cataloging Center operation for SHARE Full members for copy and original cataloging of 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 materials 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 940 items for SHARE members.
  - Cataloged 156 retrocon items for new members joining SHARE.
  - CMC cataloged 208 items for Illinois libraries.
3. Provide appropriate training for cataloging.
  - 10 Cataloging classes held in the IHLS service area.
  - 3 Cataloging work days held in the IHLS service area.
4. Evaluate the efficacy and fee models associated with the Cataloging Center operation for possible revision.
  - Have started working on the procedures for the \$3 bib.

**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.

- Have created 97 NACO authority files this fiscal year.
2. Continue support of LLSAP database cleanup efforts in LLSAP.
    - Have been contacting the other LLSAPs in the state to determine how many non-OCLC bibliographic records still need to be upgraded.
    - Have been working with the SHARE staff to identify and mark non-OCLC bibliographic records from the OCLC retrospective conversion of holdings.
  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 assistance with projects as agreed upon.
    - Have worked with ISL staff concerning transcription services.
    - Have met with the digital grant recipients and discussed the work needed.

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

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

**Activities**

1. Develop methods to deliver training to member libraries on labeling, packaging, and other preparation of library materials with the goal of improving delivery time.
  - Final version of the "Welcome to Delivery" packet printed and distributed at Reaching Forward South. Next up are the transitional/affiliate member libraries for distribution.
2. Conduct an annual delivery satisfaction and needs survey of member libraries and solicit recommendations from individual member libraries. Adjustments will be made based on need and feasibility.
  - Survey is ready to go out to the members. Late May is the anticipated date for release.
3. Evaluate the current delivery routes and adjust as needed to improve delivery efficiency using the fleet management system.
  - All hubs are "zoned" which means the same libraries in a geographic area are on the same route.

April 2015	Delivery picked up /delivered	ILDS Delivery Items to Hub	ILDS Delivery Items from Hub
Champaign	218,953	27,716	27,074
Du Quoin	147,090	25,031	23,060
Edwardsville	182,007	32,748	32,483

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

**Activities**

1. Evaluate direct and overhead costs for sorting and delivery.
  - Stats have now been gathered regarding number of hours for the actual delivery of the items and then the number of hours needed for the sorting of the materials

**Priority: Illinois Machine Sublending Agency**

**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 DuQuoin.

**Activities**

1. Contract with the Illinois State Library to manage statewide services.
  - Required monthly reports were submitted to NLS.

	C1s Sent	DS1s Sent	DA1s Sent	BARD Inquiries Responded To
<b>August 2014</b>	9	173	94	13
<b>September 2014</b>	22	154	134	15
<b>October 2014</b>	23	121	177	10
<b>November 2014</b>	10	110	114	12
<b>December 2014</b>	15	86	154	11
<b>January 2015</b>	22	78	159	14
<b>February 2015</b>	9	57	118	9
<b>March 2015</b>	19	86	176	13
<b>April 2015</b>	13	75	166	10

2. 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.

- 4/2 Midlands Conference Committee conference call.
  - 4/9 Final KLAS Conference Programming Committee conference call.
  - 4/19 - 4/24 Manager and Patron Service Coordinator attended KLAS Users Conference in Oklahoma City, Oklahoma.
  - 4/27 NLS Consultant visit to Springfield, Illinois. Machine Lending Review Report/Survey submitted to Pamela Davenport, NLS Consultant.
3. 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 of request.
  - Responded to all BARD inquiries in a timely and efficient manner.

### **Priority: Administrative Activities**

#### **Goal 1: Ensure effective utilization of IHLS resources**

**Objective A:** Ensure fiscal accountability

**Activities:**

**Goal 2:** Support the business operations of IHLS through monthly financial reports, payroll, accounts payable, and accounts receivable.

- Prepared and processed two payrolls
- Normal routine processing of Accounts Payable Invoices
- Prepared and mailed OCLC Quarterly and Monthly Invoices
- Prepared March 2015 Bill Payments Report and Credit Transactions Report for IHLS Finance Committee and Board of Directors.
- Developed FY2016 Annual Operations Budget and Explanation Template.
- Prepared FY2016 Operations Budget Presentation for Board of Directors Meeting.
- Prepared IHLS Cash Position Analysis for Board of Directors Meeting.
- Prepared FY2016 Annual Operations Budget and Narratives and Exhibits for submission to ISL.
- Prepared quarterly grant reports for ISL.

**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. Increase the applicant pool by participating in local community

events, college job fairs and advertising current openings with culturally diverse media and professional organizations.

- Recruited and secured two part-time and two full-time positions.
  - Participated in two job fairs, SIUE and SWIC.
2. Continue development of the evaluation process and assign goals for 2015. Supervisors will have quarterly one-on-one meetings with employees to ensure each employee is on track with goals.
    - Managers currently preparing annual performance reviews.
    - Executive Director will review and return to managers in May.
    - Managers will meet with employees in June.
  3. Develop and implement performance-based salary adjustments.
    - Unable to accomplish this goal due to budget restraints. However, we still expect all employees to perform at an acceptable level with proper management.
  4. Implement an enhanced hiring process. Train managers/supervisors on interviewing techniques and tools. Create and implement employee orientation at all locations.
    - Orientated two-full time employees via Skype.
    - Developing Orientation PowerPoint for on-site new hire orientations, eta July 2015.
  5. Seek and encourage participation in continuing education opportunities for staff as appropriate. Consider tuition reimbursement or enroll IHLS in Star program which enables employees to attend workshop or courses for one fee.
    - All departments enrolled in Lynda.com
    - Continuing education courses to be included in FY2016 goals.
  6. Provide all-staff training retreat focused on staff collaboration and customer service.
    - Scheduled for June 11, 2016. Theme is health and safety.
  7. Continue monthly staff meetings as well as expand the Hi-Five local meetings that can update staff in each location about weekly activities.
    - Conducted local employee meetings at all locations.
  8. Develop and implement a wellness program.
    - Weight loss challenge ended April 10, 2015.
    - IHLS employees lost a total of 212 lbs. Woohoo!
    - Distribute wellness newsletters to all employees