



# Director & Staff Activity Report

## OCTOBER 2018

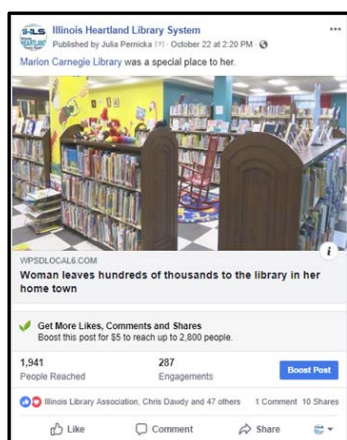
As Illinois Heartland Library System (IHLS) looks to its eighth year as a service organization in central and southern Illinois, we are not content to rest on our laurels. Our services are designed to benefit all 520+ member libraries and the communities they serve. We have made significant improvements in these areas and look forward to another meaningful year.

## ADMINISTRATIVE REPORT & STAFF ACTIVITIES

### COMMUNICATIONS

**Goals: Effective and efficient communication with IHLS stakeholders. Rebranding to continue increasing visibility within the community. Advocacy for the organization and our members.**

- Started working on marketing/swag inventory and creating a Marketing/Swag Supply Request form.
- As a service for our members, information for free or low-cost resources was gathered for a new [Resources for Libraries](#) page on the website.
- Reviewed news feeds for information of interest to IHLS members such as grants, upcoming continuing education opportunities, and member news to be included in the IHLS newsletter and shared on Facebook and Twitter.
- Fifteen (15) grants were added to the Grants page on the IHLS website.
- Three (3) vendor discounts were added to the website.
- The IHLS Member Connection newsletter was sent out to over 2,000 subscribers.
- The IHLS Staff Connection newsletter was sent to staff.
- Twitter: 19 Tweets earned 4,666 Tweet impressions. The Tweet with the largest impressions (758) was a 'selfie' during ILA.



		Page Likes	Posts	Engagement	% of Engagement
	Illinois Heartland Library System	843	14	228	27%
	American Library Association	195.3K	9	2.5K	1.28%
	Illinois Library Association	2.3K	13	103	4.47%
	Reaching Across Illinois Library System	1K	11	119	11.9%
	WebJunction	5.1K	16	382	7.5%

- Facebook: There were 63 Posts in October. The post with the largest reach was an article on Marion Carnegie Library, "Woman leaves hundreds of thousands to the library in her home town." The article reached close to 2,000 people, was shared 10 times and had 287 Engagements. The IHLS page has a higher Percentage of Engagement ( $\text{Engagement} \div \text{Likes} = \text{Percentage}$ ) for the same 7-day period when compared with similar pages on Facebook with a larger number of followers (Page Likes).

## HUMAN RESOURCES REPORT & STAFF ACTIVITIES

*Submitted by Dominique Granger, Human Resource Generalist*

The HR department was a part of the ILA Conference held last month. Recruitment began for the new PT Marketing Coordinator position out of the Edwardsville office. The Edwardsville office also had two new hires in the Operations department. Recruitment to fill Carbondale and Champaign's open positions are still underway.



### HUMAN RESOURCES

**Goal: Retain and attract highly qualified IHLS Staff whose focus will be to accomplish IHLS goals and objectives, seek continuous professional growth, and maintain a positive team dynamic.**

Live workshop or online training	Format	# of staff
Setup in Microsoft Excel 2016	Online	1
ILA Conference	Live	12
Elevate Leadership Conference	Live	8
Use AutoFill to Quickly Fill Cells from a List and Create Your Own Fillable List of Items in Microsoft® Excel® 2016	Online	1
Build Better Working Relationships at Your Library Through Advanced Communication Skills	Online	1
How to Succeed as a One Person HR Department	Online	1
Filing and Recordkeeping	Online	1
Microsoft Word 2013 Typing and Editing Text	Online	1
Project Management Pre-Work: Listing and Organizing Needs and Wants (Part 5 of 18)	Online	1
QuickBooks: Reconciliation	Online	1
QuickBooks: Invoicing	Online	1
QuickBooks: Entering Bills	Online	1
QuickBooks: Pay Bills	Online	1
QuickBooks: Deposits	Online	1
QuickBooks: Setting Up Jobs	Online	1
Mastering Social Media	Online	1

## INFORMATION TECHNOLOGY REPORT & STAFF ACTIVITIES

*Submitted by Troy Brown, IT Director*

October is the month of conferences in the library world and while IT doesn't always go to all of them, we do try to make some. One of the smaller ones this year was the statewide Illinois Library Consortia group. It is sponsored by RAILS and this year IHLS/SHARE sent Troy Brown and Pam Thomas to Joliet, IL to attend. Pam gave an update on SHARE and CMC, and Troy presented at the meeting. The presentation focused on the hardware migration for SHARE this year and the research to determine if we were going to use the cloud or physical servers. There was a lot of technical information included in the presentation, and many IT attendees really had some great questions after the presentation. They were impressed by the scale and scope of our technical environment and showed great interest in how the redundancy and fault tolerance of our systems worked. These events are important as well because we put faces to names across this large state. Presentations were given by other consortias in the state. The SWAN consortium (located in the Chicago suburb region), was especially interesting as they just brought in 19 libraries from the former Linc and Magic groups. Many of the SWAN IT staff were in attendance and I met with them all.

### IT

**Goals: To provide the IT support necessary for IHLS and SHARE to function efficiently. Support rebranding effort by implementing a new website design to IHLS website.**

- Website RFP has been reviewed by all internal sources and is undergoing final edits.

### BOARD SUPPORT

**Goals: Refine process for future board and committee meetings. 100% State and Federal Compliance for IHLS Board and appropriate IHLS staff.**



- Sent board and committee meeting calendar
- Sent updated board member contact info
- Sent Member Day survey to attendees
- Distribute copies of Annual Report to board members
- Coordinated the Annual Meeting





## ANNUAL MEETING

The 2018 Annual Meeting was held October 23, 2018 at the IHLS Champaign hub to celebrate 7 years as a library system. There were a total of 33 guests including 6 member libraries, 7 Board members, 1 alum and 20 staff members. Everyone enjoyed light refreshments, networking, and a tour of the newly remodeled Champaign office.



## RECORD RETENTION

**Goal: Retain and purge materials on an approved schedule.**

- Sorting of records has begun in Edwardsville
- Space is being cleared for permanent record storage

## MEMBERSHIP REPORT & STAFF ACTIVITIES

*Submitted by Ellen Popit, Associate Director*

October was a month full of networking opportunities! Staff were on the road much more than in the office and that's a good thing! The addition of the Membership Coordinator means that IHLS is able to do more in-person outreach and that makes a meaningful impact!

**Goals: Membership of all system agencies will be reviewed on an annual basis. IHLS will continue to develop relationships with and among the membership. Continue active partnership in statewide and national initiatives that support enhanced library service. Work with other library entities within the state among others.**

- The most significant activity to note in this section is IHLS participation in the Elevate Leadership Event which preceded the Illinois Library Association's annual conference. Leslie Bednar and Ellen Popit served as group mentors. From the staff, Joan Bauer, Troy Brown, Dominique Granger, Susan Palmer, Shelley Stone, and Anna Yackle attended as participants. Facilitated by Adam Goodman, Director of the Leadership Center at Northwestern University, the day got high marks from all of us.
- Numerous system staff and system members participated in the Illinois Library Association Conference in Peoria, October 9<sup>th</sup>-11<sup>th</sup>.



## NETWORKING

**Goals: IHLS will continue to develop relationships with and among membership. Continue active partnership in statewide and national initiatives that support enhanced library service. Work with other library entities within the state among others.**

- October 17: Anna Yackle attended the Cooperative Collection Management Group at the Pinckneyville Public Library.
- October 18: Ellen Popit attended the Southern Illinois Librarians Meeting at the McCleansboro Public Library.
- October 23: Ellen Popit conducted a site visit at the Arthur Public Library.
- October 25<sup>th</sup>: Anna Yackle attended the Metro East Public Library meeting in Jerseyville.
- October 29<sup>th</sup>: Anna Yackle attended the East Central Library networking group meeting in Gilman.

## ACCOUNTING OPERATIONS

**Goal: Equip IHLS Administration and Board of Directors with effective reporting of financial transactions to encourage good stewardship through decision making.**

- Prepared and processed two payrolls.
- Prepared September 2018 Bill Payments, Credit Card Transactions, Statement of Revenues and Expenditures, and Balances Sheet Reports for IHLS Finance Committee and Board of Directors.
- Prepared 1<sup>st</sup> Quarter FY2019 financial data for ISL Quarterly Grant Reports.
- CFO, Senior Accountant, Accounting Analyst, OCLC A/R Coordinator attended 1 day seminar, "Advanced Excel".
- Generated and mailed 244 accounts receivable invoices (OCLC –15 Monthly, 7 Quarterly and 116 Transactional; SHARE – 2 Monthly, 6 Cloud eBooks Purchases, 2 Cloud Subscriptions, 28 Quarterly, 4 Transitional, and 63 Cataloging and Barcoding; General - 1 ILDS Project).
- Received and posted 221 accounts receivable cash receipts checks totaling \$322,649.14 (OCLC –133, SHARE – 79, and General – 9).
- Received and entered 198 accounts payable invoices.
- Disbursed 111 accounts payable checks totaling \$207,733.27.

## BIBLIOGRAPHIC ACCESS STAFF ACTIVITIES

*Submitted by Shelley Stone, SHARE Manager for Bibliographic Services*

## CATALOGING SERVICE FOR SHARE

**Goals: Provide cataloging services for SHARE member libraries, including transitional libraries, and increase usability of the SHARE database by cleaning up duplicate records and incorrect cataloging and maintaining authority files in the SHARE database.**

- Staff cataloged 1,054 items for SHARE member libraries.
- Staff imported 267 \$3 bibs for SHARE member libraries.
- Staff created 33 on order bibs for SHARE member libraries.
- Staff cataloged 55 items for new member libraries joining SHARE.
- Staff merged 186 bibliographic records, cleaned up/corrected 2,811 bibliographic records, and corrected/cleaned up 6 item records.

## CATALOG TRAINING FOR SHARE MEMBERS

**Goal: Increase the understanding and skills in bibliographic services and cataloging for member libraries. Support member skills necessary for fluency in national, state and local policies such as RDA (Resource, Description and Access), OCLC and Library of Congress.**

- Staff provided 9 cataloging related classes with a total of 40 participants.
- Staff reviewed 23 files containing 91 bib records for new catalogers.
- Staff handled 134 emails and contacts.



## CATALOGING MAINTENANCE CENTER (CMC)

**Goals:** Provision of cataloging and bibliographic services for libraries in Reaching Across Illinois Library System (RAILS) and IHLS in order to increase access and encourage resource sharing of information resources found in Illinois libraries and at IDA by providing information on formation and content of metadata. Facilitate the development of expertise in the use of resource description, including cataloging and metadata, among library staffs in Illinois.



- CMC staff cataloged 185 items for libraries in Illinois.
- CMC staff created 21 new name authority records for improved user access.
- Online with the CMC: Smarter and Faster, OCLC Macros and Other Shortcuts was held as an online webinar with a short Q&A following.
- Staff attended ILA in Peoria to market CMC services
- Cataloged Talking Pen dual language books (Arabic, Mandarin Chinese, Spanish, Urdu).



## THE MARC OF QUALITY (TMQ)

**Goals:** Improve the quality of the SHARE database, thus improving user access to information resources. Add OCLC WorldCat holdings for member libraries in a timely manner, increasing resource sharing.

- File was sent to update OCLC holdings. Staff continues to work on cleanup reports.

## DELIVERY & OPERATIONS REPORT & STAFF ACTIVITIES

*Submitted by Susan Palmer, Operations Director*

October was a busy month. I visited the Carbondale location for three days. I was able to experience all facets of delivery there, from riding on a route, to sorting, and to touching base with staff.

I attended ILA (Illinois Library Association) conference in Peoria. I was fortunate to attend the pre-conference “Leading with Purpose”. I was also part of a panel table talk with Pat Burg (Illinois State Library), Diane Day (Consortium of Academic and Research Libraries in Illinois (CARLI)), Deborah Campbell (CARLI) and Mark Hatch (Reaching Across Illinois Library System). We presented on the Landscape of Resource Sharing and Delivery in Illinois.

I attended the IHLS Annual/Board meeting in Champaign. The staff did a great job of making everyone feel welcomed.

Attended “Delivery 2020 and Beyond” at the ISL with LASA (Laboratory of Applied Spatial Analysis), RAILS and the ISL. It was determined that LASA will be charged with looking at the state as a whole (no boundaries between systems...not including Chicago Public Library) as to how to make delivery the most efficient as well as determining the exchange point between RAILS and IHLS. FY2020 will see separate intergovernmental agreements between CARLI and each system. We will be analyzing our costs for ILDS (Illinois Library Delivery Service) and then creating a contract for FY2020.

I attended “Law Day with Phil” at Case-Halstead Public Library. As always, Phil shared his experience, knowledge, and wit as only Phil does. Very informative.



ILA 2018



Phil Lenzini, Case-Halstead PL 2018



John A. Logan CC Library

**Goal: Efficient provision of delivery services designed to support resource sharing among IHLS members. Provision of accurate information and educational tools to support delivery. Accurate member library delivery data in L2.**

- L2 information updated as necessary in order to provide the most up to date information for IHLS member libraries that will be shared with LASA for the Delivery FY2020 and Beyond project.
- New doors were installed by the SIUC staff for delivery in Carbondale.



## SHARE REPORT & STAFF ACTIVITIES

*Submitted by Cassandra Thompson, SHARE Director*

The month of October was a time of transition for SHARE. Traci Edwards has retired after 40-plus years of service. Joan Bauer will take over as SHARE Manager for Administrative Services and Shelley Stone has been promoted to SHARE Manager for Bibliographic Services. We have also welcomed Dr. Pam Thomas as the Bibliographic Project Coordinator for the CMC grant. In addition, the SHARE membership completed a vote to change six policies and procedures. There were 196 votes, and all six changes went through. There were two cataloging changes to add standards for Playaway Lock items and to add the option of adding reading program information to records. Circulation added a conflict resolution policy and exceptions to the public library one patron, one card rule. There was also a new procedure for SHARE staff to clean the database of long lost (3 years+) items. The sixth change was submitted from the finance committee, offering a \$300 referral bonus to member libraries that bring in new members.

### **Goal: Provide an innovative resource discovery, sharing, and delivery system.**

- SHARE staff met with representatives of both RAILS and PrairieCat to discuss state-wide resource sharing opportunities.
- The Circulation and Resource Sharing Committee met on 10/11 to discuss sharing rules and potential resource sharing programs.
- SHARE staff attended ILA in Peoria to learn and share with colleagues throughout the state.
- The IT Department created a great new tool to help SHARE member library staff. It is <https://texting.illinoisheartland.org>. This allows staff to determine the network provider for no contract cell phone services, so patrons will get text alerts sent properly.
- Innovative's Leap (Polaris web application) has been nominated for a 2019 Modern Library Award. We sent a link to members to judge the product, so LibraryWorks can select a winner.

## LLSAP DEVELOPMENT

### **Goal: Increase members participating in SHARE.**

- Tilden Public Library went live on 10/23.
- The SHARE Director participated in the Directors Chat on 10/3.
- SHARE staff attended the IHLS Annual Meeting on 10/23 in Champaign.
- The SHARE Director attended the Metro East Public Libraries networking group at the Jerseyville PL on 10/25.
- The SHARE Director discussed potential SHARE membership with two school libraries.

## ILLNET INTERLIBRARY LOAN

**Goal: Increase familiarity and compliance with the ILLINET Interlibrary Loan Code (ILL Code).**

- We are working to clean up duplicate ILL patron accounts for libraries outside of the SHARE database, to maintain database integrity. We sent a reminder to members that per policy, SHARE staff will create an ILL patron account for these library loans. There are some libraries that have created multiple accounts that need to be merged.
- There were several copies of pirated DVDs that were being circulated before the studio release. The libraries had received copies of the DVD either purchased through an Amazon third party seller or as a donation. They did not realize that it was not a legal copy and not yet released, which was an honest mistake. We sent a message to membership, reminding them that pre-publication, bootleg, or advance copies of items cannot be circulated, and then corrected the database to make sure current holds will be honored once the DVD is officially released. The affected libraries have been working with Amazon to receive refunds and to purchase legal copies.
- We clarified via newsletter that when materials are sent to alternative pickup locations, that is a form of reciprocal borrowing, which is covered by current IHLS policy. The policy outlines the responsibilities of the patron's home library. The newsletter also sent information to SHARE members reminding them that there may be local-only restrictions for new items, which is why holds may not be filled right away. We also asked libraries to check material condition before sending items for delivery.

## E-RESOURCES

**Goal: Increase familiarity with and utilization of eResources.**

- RBDigital recently changed their URL to better reflect the change in their name from OneClick Digital. We sent the new URL <https://illinoisheartland.rbdigital.com> to members, to make sure their website links are up-to-date.
- The SHARE Director met with a sales representative of The New York Times to explore options for a group purchase.
- The eResources Committee met on 10/29 to discuss member comments on proposed changes to the eResources fee schedule.

## CONSULTING SERVICES

**Goal: Increased responsiveness to the expressed needs of member libraries for consulting services.**

- SHARE staff hosted 2 workshops at the Tilden Public Library in preparation for their go live date.

## CONTINUING EDUCATION

**Goal: Increased continuing education opportunities as allowed by ISL directive.**

- On Friday, October 26<sup>th</sup>, the Case-Halstead Library in Carlyle hosted a Library Law Day with Phil Lenzini. This is a unique opportunity for our libraries to hear updates on laws impacting libraries and to bring their questions to a legal resource.
- The SHARE program offered 10 cataloging trainings (27 contact hours) with 155 participants. There were also 5 circulation trainings (13.5 contact hours) with 10 participants.