

FY2021 Annual Report Narrative

A Word From the Director

What is the true value of responsive support services provided to our 521 member libraries in central and southern Illinois? How do you balance the needs of patron safety and agency efficiency and effectiveness? How do we continue to offer the best possible customer service to our member libraries during an ever-evolving, rapidly changing global pandemic? These were the tasks facing Illinois Heartland Library System in FY2021—a year filled with challenges and obstacles, certainly, and one ready for new approaches and outcomes.

From a service perspective, much of the first half of FY2021 seemed like a reaction to external pressures and events we could not predict or control. We quickly put together an internal crisis response team whose role was to prepare “what if” responses to possible and likely scenarios related to the COVID-19 pandemic. With the basic components of our crisis response in place, we were better prepared to respond to situations. The messaging was issues-focused and allowed IHLS to pivot more quickly based on member needs. Everyone on the team had a role and, with external messaging addressed, our service teams could focus on making any necessary adjustments to their programs. The agency-wide approach to an unprecedented societal challenge utilized scalable tools and skills.

Communications

Communication with members and other stakeholders is the one task we will never consider completed. We may change platform or social media channel, but our consistent messaging regarding the availability of member services does not. We welcomed a second professional to our team this year and more than doubled the capacity of this small and mighty staff group.

In FY2021, our marketing and communications staff worked to share timely information necessary for our members as they negotiated the changing COVID-19 landscape and put the information together in one place:

--[COVID-19 Updates & Resources website](#)

We also adjusted our Directors Chats from a monthly to a weekly format for the first several months of the pandemic as a direct response to perceived member needs for networking. The chat-only technology can be a bit to manage with our growing groups of 50-60 attendees per session. The low-tech format allows participants to engage with each other while providing services at their libraries. Each chat is saved and posted to our website for later viewing.

Effective and efficient outreach also includes our biweekly member newsletter and regular social media posting. Hemmed in as we were by stay-at-home orders in FY2021, we did find a unique way to reach out with a new communication medium—public television. We were approached in January by WSIU-TV, a public television station based in Carbondale, to sponsor a documentary of Ernest Hemingway. The program originally aired April 5 through April 7

(Library Week). WSIU created a [short video](#) promoting public libraries in Illinois and filmed at an area library. IHLS included ILA as a partner and has full use of spot following the program.

Human Resources (HR)

Staff development and professional growth are key to our success as an employer of choice. A staffing change led to a new department leader determined to keep IHLS legally compliant, meeting employee needs and continually attracting top talent to join our staff team.

We have worked with the same salary and classification scale for all positions for over 8 years. The product of a salary equity study completed in FY2013 showed there was little room left for vertical expansion with only 11 classification levels. In January of this year, we embarked on a benchmarking survey contracting with HR Source for the analysis. All position descriptions were reviewed and updated, if necessary. HR Source established salary grades for each position and industry standards for salary ranges based on surveys of comparable industries and organizations. A handful of staff received market adjustments as they were paid below range for their position.

The amount of documentation necessary to track absences due to COVID-19 cannot be understated. Federal legislation such as the Families First Coronavirus Response Act (FFCRA) and the Emergency Family and Medical Leave Act (EFMLA) provided benefits like paid time away from work for certain situations, which was helpful for staff with little accumulated benefit time and part-time staff. The further we went into the fiscal year, we moved from an email-only communication system to the development of a staff intranet. Intended originally as a single source for COVID-19 related information for IHLS staff, it has grown to include our safety team training materials and other timely details.

Continuing education is a key support tool for all staff, and we support staff participation as much as is practical. In FY2021, IHLS staff access to online learning resources included:

- Niche Academy (including Ryan Dowd's Homeless Librarian series)
- Gallagher Core 360 safety trainings (available through our commercial insurance partner)
- Pluralsight (information technology-focused webinars)
- Ford Harrison webinars (available via our association with Karen Milner, Partner, Ford Harrison)—topics include human resources, diversity, and Coronavirus
- Pryor Learning—topics such as management, office software, accounting, and workplace safety (in FY2021 all classes were online)

Additionally, IHLS team members:

- Participated in *Bystander Intervention in the Workplace* webinar presented by Hollaback!
- Have access to the numerous resources of H & H Health Associates. H & H is our employee assistance program and a very cost-effective benefit. With nearly 100 staff, the cost

is just under \$3 per employee per month.

Accounting

A primary goal of our staff finance team is to equip IHLS Administration and Board of Directors with effective reporting of financial transactions that encourage good stewardship through decision making. They rose to the occasion in FY2021 and met the challenge of the pandemic. Due to the sensitive nature of their work and necessary manual recordkeeping prior to COVID-19, it was difficult to imagine most of our accounting staff could work remotely successfully. When stay-at-home orders were issued in spring 2020 and then continued for agencies not working directly with the public in the summer, the team systematically devised a virtual solution for all but a handful of tasks.

Technology improved department and agency-wide functions through the integration of two software tools:

- Microix automated timesheet and timeclock workflows: adding efficiency and saving staff resources while integrating with our Abila financial software.
- OpenGov: the budgeting and reporting components bring additional functionality to our budgeting process and provide real-time account information for project managers.

Additional achievements in FY2021 include:

- Achieved reduction in fees of \$4,800 from current audit provider after bid process.
- Utilized temporary staff to bridge gap when a full-time staff member was out on medical leave and to assist with routine HR tasks.
- Developed survey for public library members regarding accounting practices and interests, including what specific training from finance staff might be helpful to them.

IT (Information Technology)

Our IT team supports IHLS staff as they provide core system services, whether working in one of our three office locations or via remote telework. Many staff services operated remotely in FY2021 and were well positioned during this time due to already having remote access software loaded and VPNs (virtual private networks) in place. Utilizing an internal help request system, most requests were responded to within 35 seconds of being submitted.

In FY2021, all components of our organization improved from enhancements to existing technology or the introduction of new tools to move member services forward. These improvements took many different shapes:

- SHARE Administrative Services staff addressed more member issues directly, and especially due to the expanded SUQ (SHARE Users Queue) web tool enabling staff to modify, add, and delete Polaris users directly. The utility also allows SHARE staff to complete mass changes to the Polaris database if necessary.

- Finance team and project managers employed data visualization utilizing IHLS information sources with the OpenGov platform.
- Several departments implemented and deployed our Customer Relationship Management (CRM) database to achieve better documentation of changes to library subscriptions and account changes, as well as keeping track of agreements and verbal changes.
- Cross-functional team assigned to redesign the IHLS website followed the statement of work outlined in the contract with Ameex (our second vendor) to move the project forward to completion in FY2022.
- IT team expanded the use of Microsoft Azure for cloud computing as appropriate for security and availability. It was discovered that using the VPN for certain types of access and programs was ineffective, and the team moved many services to cloud functionality to eliminate the dependence on VPN functionality.

Universal improvements included:

- Our traditional onsite phone system was not meeting the needs of IHLS staff or our members. IT team determined the best option was Teams from Microsoft that interacts with other functionality IHLS staff use. While not as mature as many other solutions, Microsoft made many changes and updates with the phone service. Staff members are pleased with the integration, especially additional services like emailed and transcribed voicemails, voice recognition employee directory, contacts and call history retained in Microsoft teams, and improved anti-virus and email protection.
- Decommissioned onsite telephone servers this year and much of the file storage is moving to OneDrive. Our dependence on the cloud increased our knowledge of such technologies and increased the reliance on broadband within our offices.
- Updated firewalls at all three office locations and the Champaign colocation facility with warranties.
- As we discover the pros and cons of working with Polycom H.323 equipment in a Zoom environment, a determination will need to be made whether to continue to shoehorn in the older H.323 technology with Zoom or move to a fully integrated Zoom Room environment. Currently, there is not a Microsoft Teams solution that will allow calling to non-Teams Rooms. For example, we would not be able to participate with Illinois State Library (ISL) rooms or other rooms across the state's network.
- In June 2021, we were notified by RAILS (Reaching Across Illinois Library System) that the legacy Polycom H.323 bridge would not be renewed after July 1, 2021. Work to register those rooms in Zoom continues. The use of room systems continues to be a priority for large staff meetings and meetings including members.

As a service for member libraries, the IT team continue to support Domain Name Services (DNS). Using the Dreamhost account set up for non-profit libraries, the purchase, renewal, and maintenance of DNS allowed more members to take advantage of the service. As library domains are registered, they have been moved to Wordpress, which is hosted on Dreamhost's servers at no additional cost to the member. This benefit is extremely valuable to our members

in terms of annual cost and the timely renewal of domains, so our members never lose access to their domain name.

Bibliographic Services

As a component of core library support, bibliographic services at IHLS provides several services to libraries in the IHLS service area and to libraries statewide. A cornerstone of any contemporary resource sharing project, bibliographic services allow library patrons and staff to locate the items they need. We support accurate information and resource retrieval via two sections of this staff department:

- Bibliographic support, including cataloging and database maintenance for the SHARE Consortium and cataloging training for SHARE members.
- Cataloging Maintenance Center (CMC), which provides access to resources and special collections throughout the state, including digitized collections at Illinois Digital Archives (IDA). The CMC provides information and training on bibliographic cataloging and metadata formation.

A primary difference between SHARE and CMC cataloging staff is library location. SHARE member libraries are in the IHLS service area, and cataloging training is factored into their membership fees. CMC libraries can be in the IHLS service area; however, most are in the RAILS service area. Fees for services are covered by a long-running grant from the Illinois State Library, which explains the statewide nature of the project.

Continuing education and training are the foundation for both, and this is provided in ample measure for member libraries and IHLS staff. Within the state of Illinois, there are very few agencies with the depth of cataloging knowledge shared among our bibliographic services team. Our staff bring decades of library cataloging experience to the table. The priority placed on staff training in cataloging standards is evidenced through the following training opportunities attended by our catalogers:

Event name	Activity type	Number of participants	Length
Association of Rural and Small Libraries Conference	Virtual conference	1	5 days
Research Institute for Public Libraries Data Boot Camp	Virtual conference	1	3 days
Illinois Library Association Annual Conference	Virtual Conference	5	3 days
Online Audiovisual Catalogers Conference	Virtual Conference	5	4 days
Library Juice Academy/Beyond the Basics: Cataloging DVDs, Blu-ray discs, and Streaming Videos	Online course	4	4 weeks
Library Juice Academy/LSSC Elective	Online Course	3	6 weeks

Competencies: Cataloging and Classification Course			
University of Wisconsin/Basics of Cataloging Course	Online Course	2	8 weeks
Library Juice Academy/Subject Analysis and Subject Representation	Online Course	2	4 weeks
OCLC Member Merge Project	Online Bibliographic Utility Training	7	Several months

Cataloging training for libraries follows the target markets noted above. SHARE member catalogers are required to participate in 15 hours of continuing education per year and in FY2021 all training was adapted to the online environment. This allows member library staff to remain safe while learning and allows the repeat of a class if necessary. In addition to moving all barcoding and cataloging classes to the SHARE training portal, staff continued to provide Zoom barcoding classes periodically and worked with member cataloging staff one-on-one when necessary to review specific steps in the barcoding or cataloging workflows. The team was able to provide limited in-person training to assist new SHARE members with barcoding their collection and to address database anomalies.

The CMC has had great success with monthly sessions called Online with the CMC: short, focused learning sessions followed by an opportunity for questions and answers on a variety of topics. In FY2021, average attendance at these sessions was 65 with classes available online for later viewing. In a nod to the creativity of our CMC staff, some titles are rather catchy:

- Mixing it Up: Mixed Materials
- Braille: Decoding the Dots
- Well, Isn't that Special: Archival Materials & Special Collections

Our focus on outreach through learning opportunities within the IHLS service area and statewide resulted in the following activities in FY2021:

Event name	Number of participants	Total hours
Online with the CMC	436	436
RDA (Resource Description and Access) Audio and Video	16	75
Subject Analysis	1	15
RDA Book	17	255
Cataloging 3D Objects, Kits, and Realia	17	84
SHARE Catalogers Training Sessions (monthly)	892	1,784
SHARE Barcoding	119	357
Book Cataloging	36	108

Searching and Editing in OCLC	32	96
Introduction to Authority Control	30	90
Library of Congress Subject Headings	26	78
Dewey Decimal Classification	28	84
Cataloging Workday or In-Service	15	18
CMC Local Genealogy presentation to the SWAN eXpo	30	30
CMC Cataloging Assistance presentation to the SWAN eXpo		
CMC presentation to school librarian course at Illinois State University	12	12
CMC presentation at IHLS virtual Member Day		
Local History presentation at Illinois Library Association Annual Conference (Looking at the Past for Your Future)	112	112

Delivery

IHLS Operations staff ensure the timely delivery of library materials to our 521 member libraries through a variety of obstacles. Much of the focus in FY2021 on library materials delivery was on the safety aspect. There were several unknowns regarding the viability of the COVID-19 virus on library specimens and what that meant for the health of library patrons and staff. IHLS safety standards for operations staff (drivers and materials sorters) were based on best practices and incorporated staff input.

Team members took advantage of the modified work routines to accomplish goals and set new department standards. Regularly scheduled all-delivery staff meetings allowed the group to function as a team regardless of work locations. Improved communication developed a deeper level of trust that moved the department forward through unexpected challenges:

- Quarantining of library materials between pickup and delivery to member libraries.
- Navigating the ever-changing landscape of member libraries who were not open, open for curbside service only, or fully open.
- Development of contact-less exchange points for every library for delivery of items.
- Creating an in-house task force of staff from all three locations to remain current on research, practices of similar organizations, and recommendations regarding the work environment for the IHLS delivery team.
- Instituting a Delivery Working Group (DWG) comprised of member library directors functioning as an advisory body.

As much as possible, team leaders worked to maintain stability, which proved to be an effective tool in the face of so many unknowns. IHLS focused member and other stakeholder

communications on positive outcomes including an interactive member information session on our Delivery services and COVID-19:

- Leaned into the DWG for feedback and recommendations regarding delivery policy and practice, including quarantine periods. Members debated quarantine theory and practical application and were quite instrumental in guiding decisions reached by our leadership team.
- IHLS worked with our statewide delivery partners CARLI (the Consortium of Academic and Research Libraries in Illinois), ISL, and RAILS to provide patrons with consistent expectations regarding how long it would take before requested materials would arrive at their home libraries.
- Training new staff in the COVID-19 pandemic environment and purchasing additional protective equipment such as plexiglass dividers for the vans fleet so two people could comfortably ride together without health concerns.
- Creation of a brief five question Delivery Survey in December to gauge how delivery was doing.
- Offering an IHLS Surplus Vehicle Grant to member libraries to extend resource sharing at the community level.
- New partnership with Enterprise Fleet Management to reduce costs.
- Remodel of the first floor of the Edwardsville office.

Delivery Statistics FY2021	
IHLS Total (SHARE, non-SHARE, ILDS)	3,351,020
Total # Miles	1,011,617
Total # Stops	61,224

Resource Sharing

What can you achieve when two-thirds of a large group decide to cooperate and work together? If the group is IHLS member libraries and a significant portion choose library automation via SHARE, the answer is quite a bit! Nearly 66% (or 342) of IHLS member library agencies participate in the SHARE Consortium providing services at 474 locations in central and southern Illinois. Here is a quick look at powerful resource sharing by the numbers:

Total patrons	774,720
Total items	8.2 M
Total checkouts	5,428,653
Total filled holds	1,102,657
SHARE staff	23 (includes 2 IT and 6 CMC staff members)
SHARE member library staff	2,675

In FY2021, the SHARE organization continued to innovate with services and projects designed to expand resource sharing based on staff and member input. Two projects in particular hold far-reaching implications for future growth. As a service enhancement, a mobile library app can provide greater flexibility for patrons and libraries alike. Long on our wish list of improvements, SHARE's administrative team engaged in a thorough investigation of options and vendors for a mobile app to meet the needs of the largest automation consortium in North America. Mobile access of the SHARE OPAC (online public access catalog) has steadily increased for two years. More features are available to patrons through an app as compared to mobile optimized web access. SHARE membership eventually selected Solus as the app provider following several stages of member and staff involvement including:

- Committee participation: SHARE E-Resources Committee, SHARE Finance & Policy Committee, and the SHARE Executive Council all evaluated the proposal and eventually recommended Solus to SHARE membership.
- Demonstrations at committee and general member level: SHARE membership had opportunities to learn more via live and recorded demos.
- Financial planning to provide the benefit to all SHARE members:
 - SHARE Finance & Policy recommended use of SHARE Reserve Fund to provide base app at no cost to membership for three years.
 - IHLS Finance Department SHARE reviewed contract to incorporate into SHARE FY2022 budget.
- Communications and approval: SHARE administrative team maintained transparent throughout the process from proposal to membership approval with posted budgetary and statistical analysis, plus talking points for members and their patrons on the [SHARE website](#)

The Illinois State Library provided grant funds to improve e-resources targeted to juvenile and young adult readers to support their school curriculum. The Purchasing E-Books to Support Member Libraries and Their Communities Grant was funded at \$125,000 utilizing CARES Act (Coronavirus Aid, Relief and Economic Security Act) resources. The grant added 4,342 new titles to SHARE's integrated e-book platform, cloudLibrary. It built upon existing organizational strengths as well as inventive approaches to member involvement:

- Collection pre- and post-assessment: deliberate analysis of existing collection to identify strengths and opportunities for growth, plus evaluation of grant targets at project end.
- Continued vendor partnership: SHARE and cloudLibrary (from Bibliotheca) have a long-term relationship strengthened by our project team's in-depth knowledge of the current e-resource environment.
- Member library participation: to increase collection development, six member librarians partnered as selectors.
- Communication: SHARE administrative team reached out to membership regularly to promote the grant opportunity and solicit suggestions for acquisitions.

- New readers' advisory content for members: SHARE and IHLS Marketing and Communications Department worked together to generate patron-facing content for member libraries to share in order to drive patron usage.

Our SHARE staff applies the same measured approach to all facets of their interaction with members and vendors with the ultimate goal of improved patron satisfaction:

- COVID support: as SHARE member libraries continued to navigate the health and safety measures of the COVID-19 pandemic, our staff provided timely assistance, making adjustments as necessary in the Polaris administrative module.
- Common Loan Committee: SHARE administrative staff formed an ad hoc committee to gauge member interest in developing recommended loan periods and renewals in the Polaris platform, with a goal to improve patron satisfaction.
- Polaris Leap training: a growing number of SHARE members added the Polaris Leap web application, with access to a suite of learning videos.
- AISLE (Association of Illinois School Library Educators) partnership: SHARE staff actively engaged in supporting school library staff along with our colleagues from AISLE and RAILS (Reaching Across Illinois Library System). Developed and presented System E-Content and E-Resources for Illinois Educators to share information regarding e-resources, vendors, and discounts to school library staff.
- SOPPA (Student Online Personal Protection Act) Compliance: legislation designed to protect student information from third-party providers led SHARE administration to develop and propose a SHARE privacy and data policy.
- RBdigital merger: managed the impact of the merger between RBmedia and Overdrive, including refunds to member libraries.
- cloudLibrary magazines: explored group purchase and did not move forward based on overall cost, selection, and member feedback.
- New York Times group purchase: after contract renewals were significantly raised, SHARE worked on a group purchase with members and the New York Times, which lowered each library's annual cost.
- Swank group purchase: administered the group licensing discount available to member public libraries on major Hollywood films for public use.

Membership

Every fiscal year is different and FY2021 certainly will always stand far above the rest. However, Membership Services are always about supporting our members. So, pandemic or not, that is exactly what IHLS provided. A stated goal under Membership is to support member libraries in their efforts to "...provide excellent library service to their stakeholders." To achieve this goal during a pandemic was a challenge. Our staff worked collaboratively together with members to ensure their needs were a priority.

At a system level, multiple opportunities were put into place for libraries to network and turn to others for mutual support. The best example of this was the reliance of so many people on the Directors Chat. This chat has been in place for several years. Originally, it was held once a month, but when the pandemic hit, it moved to a twice weekly format. Beginning in FY2021, sessions were scheduled for every Thursday at 1:00 p.m. It is a chat-based formula, using Adobe Connect—nothing new or flashy and an average of 40 people continue to participate each week. It is obvious that this became a safe space for people to network with one another and share mutual concerns. An average of 152 contact hours per month were achieved through this event. The Directors listserv did much the same thing (it has always been very active); however, it was the chat sessions that just exploded.

Members Matter meetings were held four times during FY2021, covering a broad range of topics and always including a networking component:

Session title	Date	Live attendees
An Update from the Illinois State Library- 2021 Public Library Per Capita Grants + Cards for Kids Legislation and Administrative Rules	September 14, 2021	137
Team Up to Keep Communities Active + Engaged	January 27, 2021	51
Library Ethics 101: What Would You Do?	March 14, 2021	84
Public Libraries and Illinois State Courts	May 13, 2021	47

Member libraries realized the value of networking in these quickly changing times and networking groups that once met in person quickly moved to a virtual platform. Seeing faces of colleagues and hearing their voices went a very long way in trying times. Whether it was following a chat or participating in a Zoom networking meeting, system staff from diverse departments participated on a regular basis. If it was a discussion about how to hold a virtual board meeting in compliance with OMA or tweaking settings in SHARE when a library needed to close temporarily or to discuss quarantine protocols, a staff person was there to handle the question.

IHLS continued to draw on resources statewide to support our members this year:

- Human resources administration is a facet of every library director’s job, and for the second year in a row, IHLS partnered with HR Source to make a series of webinars available: *Job Descriptions: Why, What and How, Conflict Management, and Critical Conversations: Conducting Effective One-on-Ones.*
- Through active participation in statewide organizations, the membership team brought enhanced service and accurate information to our membership. Involvement with ILA’s Public Policy Committee, the Small and Rural Libraries Forum, Directors U, and leadership in the statewide working group formed to support AISLE (Association of

Illinois School and Library Educators) went far in connecting our members to the broader library community.

The silver lining in planning events for our members was that we were not place bound, so we could include presenters from anywhere. This was particularly helpful in planning our 2020 Member Day, which made a quick pivot from in-person to virtual as planning began in the spring of 2020. Presenters joined us virtually from Chicago, Kansas, North Carolina, and Seattle, Washington. Another benefit to this virtual format was the fact that members who would not have participated in an in-person event for various reasons were able to join us. The appeal of virtual participation is a fact that many agencies will pay attention to as a “lesson learned” from COVID-19.

Membership, continuing education, and networking are service areas where we are only bounded by time, funding, and creativity. Our membership staff, no more than a team of two full-time professionals, creatively provided more services to our members in large part due to their combined contacts in the field. In FY2021, all programs and services were virtual, which created various adjustments, whether positive or negative:

- Department staff were able to attend the various member networking groups during the year as those too were virtual.
- IHLS did seek legal advice on behalf of member public libraries from our legal counsel Phil Lenzini. It is not unusual to require Phil’s advice from time to time during the year. In FY2021, we had an unusual volume of questions outside of routine library law.
- Notably, a victim of the pandemic was site visits to member libraries. While a few were achieved virtually with new public library directors, it is not the same. Getting to know a library staff member on their “home turf” is an unmatched tool for system staff in serving all our members.

The Membership Team is always committed to working with our member libraries and our colleagues at the Illinois State Library to ensure that nothing falls through the cracks that is of importance. We are always happy to be given the opportunity to aid with the completion of annual tasks such as annual reports, certification, and non-resident fees.

Professional development for members and system staff looked very different this year. Because conferences were all virtual, some opportunities became available that would have been cost prohibitive if taken advantage of in person. Along with offerings that were very particular to their work responsibilities and interests, system staff virtually attended conferences that included events sponsored by:

- American Library Association
- Illinois Library Association
- Association for Illinois School Library Educators
- Association of Rural and Small Libraries
- Reaching Forward Illinois

In the objectives outlined for FY2021, the final one reads: “Maintain timely and accurate information on our Membership.” Certainly, the transition from L2 to L2: Library Directory and Learning Calendar positioned systems and libraries throughout the state to do just that. The introduction of a Customer Relationship Management (CRM) tool will also allow us to collect and share more specific information on our membership and our interactions with them.

Our focus on member outreach and the power of multitype libraries continues to attract new agencies to our organization. During this fiscal year, three libraries have been in conversation with membership staff regarding system membership. Two of the conversations are in very preliminary stages. In addition, three correctional center libraries are waiting in the wings to move forward with the membership process.

As we begin our seventeenth month of working within a pandemic environment, the stated goal to support member libraries as they provide service to their stakeholders remains true—whatever the challenge, the commitment on the part of IHLS to provide support remains strong.

DRAFT