



ILLINOIS STATE LIBRARY
 FY2017 SYSTEM AREA AND PER CAPITA GRANT APPLICATION
ILLINOIS HEARTLAND LIBRARY SYSTEM

3.1 FY2017 Operational Plan

System Operational Plan

~~Heading into our fifth year of operation, envisioning a plan of service for the Illinois Heartland Library System is an exciting endeavor. As library systems celebrate 50 years of serving Illinois citizens, the rich and vibrant culture of resource sharing is alive and thriving.~~ Looking to FY2017 and Year 6 as a large service organization, the uncertainty of state support is ever present. Illinois Heartland Library System (IHLS) has demonstrated a capacity for providing more and better member services for our members regardless of the financial challenge. Placing member needs first allows us to improve current services and develop new services as well. To paraphrase Aristotle Onassis, "We have freed ourselves of the hope that the sea will ever rest. We have learned to sail in high winds."

A. **Administrative:** Administrative Services are necessary to keep our agency running smoothly and able to serve our members. In FY ~~16~~17, these services will focus on:

- ~~• The development and implementation of a strategic plan for the library system.~~ Implementation of three-year plan to improve member services.
- ~~• Endeavors to improve communication with all IHLS stakeholders.~~ Assessment and modification of communication paths with all IHLS stakeholders.
- Continued training and implementation of additional modules in the Abila software.

ADMINISTRATIVE			
Service Priority	Goal	Objective	Activities
Communications	1. Effective and Efficient Communication with IHLS Stakeholders	A. To support and maintain an interactive website to assist member libraries in the effective utilization of IHLS services	(1). Ensure timely website information by routine updates.
			(2). Review website to enhance visibility and usability
			(3). Receive and post job postings, for internal positions, positions at member libraries, and outside libraries
			(4). Investigate feasibility of membership web portal to consolidate information that is relevant to each member <u>Regularly update and maintain the Grant page with current grant opportunities available to members.</u>
			(5). <u>Regularly update and maintain the Vendor Discount page with current discounts available to members.</u>



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			<u>(6). Investigate feasibility of membership web portal to consolidate information that is relevant to each member</u>
	B. To support communication among stakeholders through the utilization of Web Conferencing Tools		(1). Continue regularly scheduled activities such as Connect with Leslie, Online Chats for Library Directors and Regularly Scheduled SHARE Chats
			(2). Reconvene the Advisory Council by scheduling town hall meetings throughout our service area and utilizing video teleconferencing to reach a better audience <u>Conduct bimonthly Members Matter meetings throughout the service area, utilizing video teleconferencing to reach a better audience, to update the membership on regional, state, and library news and developments.</u>
	C. To keep stakeholders informed on what is happening at the system, statewide and national levels		(1). Produce and distribute electronic newsletter on a regular basis to approximately 2,500 subscribers

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ADMINISTRATIVE			
Service Priority	Goal	Objective	Activities
Communications			(2). Produce and distribute a monthly newsletter to IHLS Staff
			(3). Explore the possibility of a Trustee newsletter by targeting specific library types Explore various avenues to target specific library types (i.e., schools, trustees, etc.).
			(4). Delayed due to funding deficit Explore methods to seek feedback and suggestions from the membership on how we are communicating.
		D. To work cooperatively with ISL, RAILS and other stakeholders to provide excellent library services	(1). As possible, support statewide library initiatives
Human Resources <u>/Finance</u>	1. Support and Development of IHLS Staff	A. Have a diverse pool of qualified candidates	(1). Use resources such as: Monster.com; IHLS; ILA; Illinois JobLink; Non-Profit Network; Craigslist; U of I; Lindenwood University; as well as regional job fairs
		B. Ensure IHLS has a legal workforce	(1). For all final candidates use resources such as: System Award Management, County Court Records; Homeland Security, Office of Attorney General; Transcript Clearinghouse
			(2). Ensure Pre-Employment screening for Drug-Free Work Place through Quest Labs
			(3). Ensure operations staff is qualified with a Fit for Duty Exam
		C. All new hires have a formal orientation	(1). Introduce new employees to IHLS policies, rules, procedures and staff on their date of hire
		D. IHLS staff will be provided with workplace support	(1). HR Director will visit each hub on a regular basis



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			(2). Trainings on safety, sexual harassment and diversity will be offered on a regular basis
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ADMINISTRATIVE

Service Priority	Goal	Objective	Activities
Human Resources/Finance			(3). All staff day will be held
			(4). Trainings will be developed for managers and supervisors
			Cancelled due to funding deficit
			(6). Staff will be supported and celebrated with wellness and retention activities
			(7). Staff will be encouraged to participate in professional organizations and attend conferences as appropriate
			E. Ensure HR compliance and procedures are up to date with current employment laws
			F. To provide professional development for staff
		Cancelled due to funding deficit (1) Staff will participate in continuing education opportunities if funding allows	
		Cancelled due to funding deficit (2) Utilize external resources such as Management Association membership and counsel for legal concerns	
IT	1. To provide the IT support necessary for IHLS to function efficiently	A. Provide support for Core System Services	(1). Provide software and technical assistance for members of the LLSAP as it relates to the services of SHARE
			(2). Support IHLS staff at all office locations and provide remote support through applications like TeamViewer and Adobe Connect. Changed software provider due to funding deficit



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			(3). Maintain internal and external web services for IHLs, and SHARE as well as support for IMSA sites
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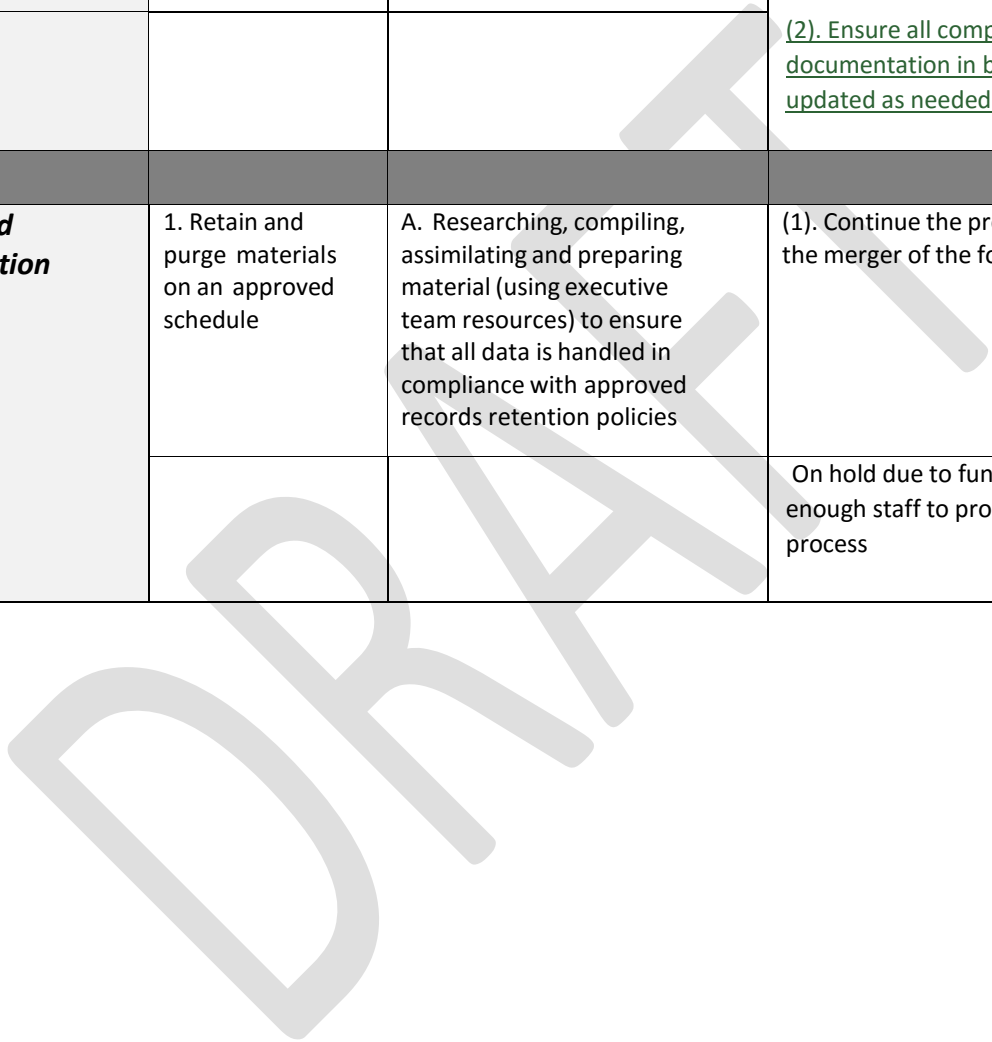
ADMINISTRATIVE

Service Priority	Goal	Objective	Activities
IT			(4). Maintain SHARE helpdesk software to track and repair problems reported by SHARE membership
			(5). Work with Operations to implement and maintain the driver counting project utilizing tablets
			(6). Support all internal and external servers and services that relate to the daily functions of IHLs. Including telephone servers, internal file servers, cloud services, finance servers, etc.
Board Support	1. Create a seamless process for future board and committee meetings Refine process for future board and committee meetings	A. Work with members to determine what works best for them. Create processes that will eliminate delays and will increase communication. Created quarterly calendar to provide one stop for all meetings. Modify processes to improve communication between board and executive staff. Ensure compliance with Open Meetings Act.	(1). Provide support for monthly meetings for the board and six committees
			(2). Share monthly meeting calendars with board and appropriate staff.



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			<u>(3). Post meeting packets and approved meeting minutes within timeframes outlined in Open Meetings Act.</u>
	2. 100% State and Federal compliance IHLS/Board <u>and appropriate IHLS staff.</u>	A. Ensure all board members are compliant with regards to state and federal law. Ensure all material is updated	(1). Submit all compliance documentation to board members as annual requirements annually <u>and/or</u> and when new board members come on board <u>are seated.</u>
			<u>(2). Ensure all compliance documentation in board binders is updated as needed.</u>
Record Retention	1. Retain and purge materials on an approved schedule	A. Researching, compiling, assimilating and preparing material (using executive team resources) to ensure that all data is handled in compliance with approved records retention policies	(1). Continue the process begun with the merger of the four legacy systems
			On hold due to funding deficit, not enough staff to properly attend to this process





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Service Priority	Goal	Objective	Activities
Grant Document Tracking	1. Maintain and track all grant documentation and due dates	A. To create tracking data sheet and notification process	(1). Submit all grants and submissions by deadline on the <u>a</u> quarterly basis <u>as</u> required
Membership	1. Membership of all system agencies will be reviewed on an annual basis	A. To support the Annual Certification process supported by IHLS Staff	(1). Staff will monitor and follow-up with libraries having membership challenges, as well as libraries interested in joining the automation consortium
Networking	1. To make IHLS an active partner in statewide and national initiatives that support enhanced library service	A. To support the Illinois Service Hub Application to the Digital Public Library of America (DPLA)	(1). The Cataloging Maintenance Center will write metadata and other transcripts as needed
			(2). IHLS will disseminate information to all members regarding how they can participate in the DPLA project moving forward
			(3). IHLS will work with the ISL and other library organizations to promote the DPLA service hub statewide
		B. To support professional development and continuing education opportunities for member libraries	(1). Partner with statewide stakeholders in planning the combined "Library State of Mind" Conference for the fall of 2015
			(2). Explore opportunities for shared services in consulting and continuing education
			(3). Participate, as asked, in committee work that will benefit our stakeholders
Accounting Operations Human Resources/Finance	1. On time delivery of financial reports	A. Fiscal year audit completed and submitted to Illinois State Library by September 30, 2015	(1). Analysis of FY2015 transactions and adjusting entries in July <u>Audit fieldwork to be done the last week of July 2016</u>



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			(2). Auditing firm on-site in August, 2015 <u>FY2016 Audit to be presented to IHLS Board at August 2016 meeting</u>
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ADMINISTRATIVE			
Service Priority	Goal	Objective	Activities
Accounting Operations <u>Human Resources/Finance</u>		B. All grant reports submitted to Illinois State Library 15 days after end of fiscal quarter	(1). All transactions for the month prior must be received by the 10th day of the month
		C. Statement of activities, bill list, credit card transaction report and cash flow analysis reports completed middle of following month	(1). All transactions for the month prior must be received by the 10th day of the month
	2. Continued implementation of Abila financial management software	A. Implement paperless timekeeping and payroll processing system	(1). Hours worked will be input into HR system when worked
			(2). Direct deposit vouchers to be emailed to employees
		B. Develop implementation schedule for Human Resources Information System (HRIS) component of Abila software	(1). Investigate employee self-service information options for the organization
		C. Appropriate staff have real time access to financial data for budgeting purposes	(1). Department and grant managers set up with executive view rights for their areas of responsibility only on accounting software
	3. Financial procedures consistent with current fiscal eliminate <u>Continued implementation of Abila financial management software</u>	A. Updated credit card program <u>In first quarter FY2017 all employees to be using the employee web service fully.</u>	(1). Evaluate vendor, policy and staff usage <u>Train staff and rollout of service to be completed by location.</u>
		B. Implement pre-approval process for purchases <u>Appropriate staff have real time access to financial data for budgeting purposes.</u>	(1). Excluding fuel card and routine transactions, prior approval required from Executive Director or Chief Fiscal Officer <u>Department and grant managers set up with executive view rights for their areas of responsibility only on Abila system.</u>



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			<u>(2). Finance staff will meet with directors monthly prior to the IHLS Board Meeting, to monitor status.</u>
	<u>4. Effective and efficient communication with IHLS staff</u>	<u>A. Support communication within department.</u>	<u>(1). Department staff meet weekly to establish priorities and review project status.</u>
		<u>B. Support communication with IHLS supervisors.</u>	<u>B. Support communication with IHLS supervisors.</u>
	<u>5. Assist Operations Department</u>	<u>A. Partner with Operations to improve delivery statistics process</u>	<u>(1). Develop an enhanced process for maintaining delivery statistical information on a weekly/monthly basis and monitoring actual statistics against FY2017 budget projections.</u>
	<u>6. Support resource sharing</u>	<u>Objective A. Ensure Adequate SHARE Operating Cash for FY2017</u>	<u>(1). Prepare and mail SHARE FY2017 Annual Billing Invoices early July 2016.</u>



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<p>Long Range Planning <u>PENDING!</u></p>	<p>1. Three-year plan</p>	<p>A. Combine board, member and staff input with current fiscal climate to direct system services into the near future <u>Develop implementation timeline of long range objectives approved October, 2015.</u></p>	<p>(1). Committee and executive staff team draft report to board <u>Administrative staff draft timeline in consideration of current fiscal climate. Utilize cross team methods to gather input from all staff.</u></p>
			<p><u>(2). Share timeline with committees and board for further refinement.</u></p>
			<p>(2). Board accepts report with or without modifications</p>
			<p>(3). Begin implementation of long range plan components</p>

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- B. **Bibliographic Access:** As a cornerstone of resource sharing, Bibliographic Access services in FY17 will promote:
- The availability of bibliographic support in a variety of methods including cataloging and database maintenance for the SHARE Consortium, cataloging training for SHARE members and statewide support through the Cataloging Maintenance Center.
 - Access to digitalized information found in Illinois libraries and at IDA by providing information on formation and content of Metadata.
 - ~~After requesting our assistance, RAILS staff opted to complete their own cataloging and/or training to their members.~~

BIBLIOGRAPHIC ACCESS			
Service Priority	Goal	Objective	Activities
Cataloging Services for SHARE	1. To provide cataloging Services for SHARE member libraries	A. To provide a full level OCLC bibliographic record for the SHARE database	(1). Catalog materials and set holdings in OCLC WorldCat. Import bibliographic records into the SHARE database
			(2). Staff will maintain statistics documenting the number of items cataloged and the libraries for whom they were cataloged
		B. To answer questions concerning searching/matching, item information, how to find, and statistics, etc. for SHARE member libraries	(1). Answer emails, answer help tickets and phone calls
		C. To input "on order" bibliographic records and equipment records for member libraries	(1). Input bibliographic records into SHARE based on information from forms and e-mails
	2. To increase usability of the SHARE database by cleaning up duplicate records and incorrect cataloging and maintaining authority files in the SHARE database	A. User access to information resources will be improved as the result of the SHARE database containing fewer less than full level bibliographic records and fewer duplicate bibliographic and authority records	(1). Identify and merge duplicate bibliographic records found in SHARE database; check for and remove provisional bibliographic records; check for and mark ON THE FLY bibliographic records



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BIBLIOGRAPHIC ACCESS			
Service Priority	Goal	Objective	Activities
Cataloging Services for SHARE			(2). Import weekly authority record changes and make corrections as necessary
			(3). Create and maintain local serial authority records for titles found in SHARE
Cataloging Training	1.To increase the understanding and skills in bibliographic services and cataloging for members libraries and to stay current with national, state and local policies such as RDA, AACR2, OCLC and Library of Congress	A. For "Cataloging" libraries to maintain 15 hours of cataloging continuing education per fiscal year	(1). Monthly Cataloging Sessions via Adobe Connect; Monograph Cataloging; Authority/Subject Analysis; OCLC Connexion and other classes
		B. For member libraries to correctly search and match to bibliographic records found in the SHARE database based on item in hand or question from patron	(1). Monthly Cataloging Sessions; Monthly Chat session; Reports training; and other as needed training
Cataloging Maintenance Center	1.To provide cataloging and bibliographic services for the libraries in RAILS and IHLS in order to increase access and encourage resource sharing of information resources found in Illinois libraries	A. User access to information resources will be improved as the result of LLSAP databases containing fewer "less than full level" bibliographic records and fewer duplicate bibliographic and authority records	(1). Identify records that lack OCLC accession numbers in the IHLS SHARE database, and coordinate with the holding libraries in order to find full level OCLC records, import into the SHARE database and delete the older record
			(2). Provide full level OCLC records for substandard local records from the RAILS PrairieCat database---requesting physical items when necessary in order to identify or upgrade corresponding OCLC records---to PrairieCat staff for importation into PrairieCat



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BIBLIOGRAPHIC ACCESS			
Service Priority	Goal	Objective	Activities
Cataloging Maintenance Center			(3). Identify and merge duplicate bibliographic and authority records in the SHARE database
			(4). SHARE will maintain quarterly spreadsheets documenting the number of bibliographic records upgraded and for whom, and the number of duplicate bibliographic and authority records merged in the SHARE database
		B. User access to Illinois libraries' special collections will be established via CMC cataloging of these resources	(1). Continue to publicize this service via the IHLS web site and contacts with Illinois LLSAP staff and current service recipients
			(2). Use system courier service and ILDS for transport of special collections materials to and from the CMC
			(3). Travel to libraries to catalog materials too fragile or unique for transport via courier
			(4). Catalog materials and set holdings in OCLC WorldCat and supply RAILS LLSAP staff with the resultant bibliographic records. CMC staff will import the resultant records into SHARE
			(5). Staff will maintain statistics documenting the number of items cataloged and the libraries for whom they were cataloged
		C. Contribute at least 100 name or uniform title authority records to the Library of Congress Authorities	(1). IHLS catalogers will submit works requiring new name and/or uniform title authority records to NACO trained CMC staff



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BIBLIOGRAPHIC ACCESS			
Service Priority	Goal	Objective	Activities
Cataloging Maintenance Center			(2). Staff will create and distribute authority records via OCLC Connexion and, when necessary, supply the resultant records to LLSAP staff for importation
			(3). Staff will maintain statistics documenting authority record creation
	2. To support access to digitalized information found in Illinois libraries and at IDA by providing information on formation and content of metadata	A. User access to digitalized information will be established by CMC providing metadata for these items	(1). Publicize this service via the IHLIS web site and contacts with Illinois LLSAP staff and current service recipients
			(2). Work with the library to determine what information is needed for metadata, where metadata and digital images will reside, and create the metadata if necessary
			(3). Staff will maintain statistics documenting the number of items for which metadata was created and the library for whom the metadata was created
After requesting our assistance, RAILS staff opted to complete their own cataloging and/or training to their members			



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Service Priority	Goal	Objective	Activities
TMQ (The MARC of Quality)	1. Improve the quality of the SHARE database, thus improving user access to information resources	A. Analyze reports from TMQ and anticipate decreases in error rates	(1). Identify and merge duplicate bibliographic records in the SHARE database
			(2). Make corrections to bibliographic records as found on reports from TMQ
	2. OCLC WorldCat holdings for member libraries are updated in a timely manner, which should increase resource sharing	A. To keep a statistical count of how many holding records are added to and deleted from OCLC	(1). Maintain spreadsheets documenting the number of WorldCat holdings altered, as reported by WorldCat

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C. Resource Sharing efforts during FY17 are as follows:

- Highlight the focus on full participation in resource sharing ~~within~~ as required by the revised system standards.
- Make a system-wide effort to use multiple channels of communications and formats of continuing education to ensure libraries are familiar with the revised ILLINET Interlibrary Loan Code.
- Continue the development of our LLSAP through the promotion ~~of the DREAM Grant the advantages of membership in SHARE. Of particular focus will be a concerted effort to raise awareness and participation among our school district members.~~ Of particular focus will be a concerted effort to raise awareness and participation from any ILLINET member, regardless of library system affiliation. Additionally, the work to bring transitional members to the point of going live on SHARE will involve a significant amount of staff time and attention.
- Continue to enhance and improve services for existing LLSAP members through attention to current practices and policies and being alert to opportunities for improvement that might present themselves during the fiscal year.
- Research and review E-Resources that would be beneficial to our stakeholders. E-Resources that are adopted for system use will be promoted throughout the system with the expectation of increased participation.

RESOURCE SHARING			
Service Priority	Goal	Objective	Activities
LLSAP (SHARE)	1. Provide an innovative resource discovery, sharing and delivery system	A. Encourage Resource Sharing	(1). Monitor SHARE policy and protocol compliance and coordinate those policies with IHLS policies regarding resource sharing
			(2). Assist member libraries in promoting their participation in reciprocal borrowing within IHLS and statewide
			(3). Maintain non-resident borrower card purchase locations on the IHLS website
			(4). Promote the resource sharing capabilities of the LLSAP to all member libraries
			(5). Support patron initiated ILLINET interlibrary loan for LLSAP members



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			<p>(6). Review the system's resource sharing policy to ensure it is up to date and well aligned to current Illinois Library Laws & Rules as well as the SHARE Resource Sharing Policy.</p>
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RESOURCE SHARING			
Service Priority	Goal	Objective	Activities
LLSAP (SHARE)			(6). Provide training on how to effectively use tools for ILLINET interlibrary loan beyond the LLSAP using OCLC WorldShare
			(7). Utilize training on the SHARE Polaris platform for all available modules across a variety of delivery methods. When appropriate, ILLINET interlibrary loan, reciprocal borrowing and reciprocal access as well as copyright will be addressed
			(8). Monitor the progress of member agencies in adopting the recommendations of the revisions in delivery and ILL policies and processes
			(9). Explore the cost and capability of interoperability with libraries independent of the LLSAPs
		B. Provide a framework for members to participate in a state-of-the-art integrated library system	(1). Act as legal and financial authority for SHARE
			(2). Manage the SHARE investment account
			(3). Continue to evaluate 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
			(4). Apply for appropriate grants to provide enhancements to the SHARE catalog



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RESOURCE SHARING			
Service Priority	Goal	Objective	Activities
LLSAP (SHARE)			(5). Employ a variety of instructional methods to allow SHARE members to work effectively and efficiently with the ILS and other shared databases
			(6). Assist with the migration of libraries who do not wish to continue to participate in the SHARE LLSAP
			(7). Support the SHARE Helpdesk to track concerns and technical issues with the ILS
			(8). Continue the development and enhancement of the SHARE website to meet the informational and training needs of the IHLS libraries. Provide software and technical support for members of the LLSAP
LLSAP Development	1. Increase members participating in SHARE	A. Continue to promote the growth of SHARE through the DREAM Grant opportunity	(1). Libraries will continue to be made aware of the grant opportunity in conjunction with the focus on full participation in Resource Sharing
ILLINET Interlibrary Loan Code	1. Increase familiarity and compliance with the ILLINET Interlibrary Loan Code	A. Provide educational opportunities for member agencies to learn the implications of the revised ILL Code	(1). Online and in person formats will be used to reach out and train our multi-type membership
		B. Monitor the progress of member agencies in adopting the recommendations of the revisions in the ILL Code	(1). SHARE Circulation & Resource Sharing staff will maintain regular contact with member libraries to help ensure understanding and compliance with the ILL Code



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RESOURCE SHARING			
Service Priority	Goal	Objective	Activities
eResources	1. Increase familiarity with and utilization of eResources	A. Increase use of eResources in SHARE member libraries including (but not limited to) eRead Illinois, eMagazines and third-party databases	(1). Contact various eResource providers to obtain quotes and information about their services to provide to member libraries, via posting on the SHARE website and email messages
			(2). Provide on-site assistance to library staff on use of eResources, who will, in turn, provide training to their patrons
			(3). Create training videos and materials for member library use
			(4). Continue working <u>Work</u> on integrating eResources with Polaris, to facilitate ease of patron use of eResources
			(5). Develop an <u>Work with the</u> eResource Committee to review products, policies, and practices. The committee will be populated by <u>consists of</u> representatives of the SHARE governing organization, SHARE member libraries, and SHARE staff
			(6). Develop <u>Continue developing</u> consortia for the purpose of sharing electronic resources, as appropriate to meet the needs of interested library members and their patrons



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D. **Consulting and CE:** The value of consulting and continuing education opportunities have been voiced loud and clear by our members for the past four years. As these services begin to grow back, efforts will be designed to:

- Hit the target of site visits to 20% of our member libraries (108 agencies). Agencies would include public libraries with new directors, struggling school districts and responses to specific invitations from library agencies who would like assistance with understanding and complying with State Statutes and Administrative Rules as well as system bylaws, policies and services.
- Support training on the revisions of the ILLINET Interlibrary Loan Code.
- Continue the development on an annual IHLS Member Day.
- Craft no-cost or cost-recovery continuing education opportunities for our members that comply with ISL directives.
- Encourage member awareness of and participation in regional, statewide and national professional development opportunities as they present themselves.

CONSULTING AND CE			
Service Priority	Goal	Objective	Activities
Consulting Services	1. To be responsive to the expressed needs of member libraries for consulting services	A. Visits to 20% of IHLS Libraries. 108 of the 540 IHLS Libraries will be visited in FY16	(1). Priority visits will be to new directors of public libraries, libraries interested in <u>joining the automation consortium</u> the DREAM-grant and at-risk schools
			(2). Site visits will also be scheduled with libraries that express specific needs, eg: A presentation for a board or administrators on a specific topic
			(3). System Staff will also be available to work with local special interest groups



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Continuing Education	1. To provide continuing education opportunities as allowed by ISL directive	A. Provision and identification of opportunities that will assist member libraries in understanding and complying with applicable State statutes and administrative rules; and with the system's bylaws, policies and services	<u>1. (1). Particular focus will be made in FY 16 on the revision of system standards and the ILLINET Interlibrary Loan Code. A variety of educational opportunities will be offered to ensure the information is disseminated as widely as possible.</u> <u>In FY17, IHLS will continue to highlight the revision of system standards and the ILLINET Interlibrary Loan Code. As staffing and funding is available, a variety of educational opportunities will be offered to ensure the information is disseminated as widely as possible.</u>
			<u>(2). If the funding allows, Implementation of the 2nd Annual Member Day</u>

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CONSULTING AND CE			
Service Priority	Goal	Objective	Activities
Continuing Education			(3). The development of annual HR workshops to increase the knowledge of employment law for our members. These will be offered in multiple formats <u>Continue to partner with the Illinois State Library in an effort to provide professional development hours to school libraries.</u>
			(4). IHLS Staff will actively promote continuing education offered by the Illinois State Library, The Illinois Library Association and the Illinois School Library Media Association
			(5). Through available communication tools, IHLS will share information regarding appropriate continuing education opportunities that would be of interest to our members



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E. **DELIVERY:** The focus of delivery services offered by the Illinois Heartland Library System in FY17 these services will include:

- Compliance with the recommendations of the Illinois Statewide Delivery Committee.
- The availability of 5 day a week delivery using zoned routes and SHARE software.
- A revised web presence.
- A help desk designed to provide responsive customer service.
- Efficient tracking of delivery statistics through the in-house creation of an app that will allow data to be input throughout the day and uploaded on a regular basis.

DELIVERY			
Service Priority	Goal	Objective	Activities
Delivery Services	1. Efficient provision of delivery services designed to support resource sharing among IHLS members	A. To comply with recommendations put forth by the Statewide delivery committee	(1). IHLS Staff will monitor compliance progress on an ongoing basis
		B. To make 5 day a week delivery available to our libraries. (SMART Delivery)	(1). Zone libraries in each of the hubs to enable libraries to be added or deleted from a route depending on need <u>Laboratory of Applied Spatial Analysis (LASA) from SIUE utilized GIS software to provide maps for all of IHLS, reflecting the goal of giving functional 5 day per week service.</u>
			(2). Use SHARE software to generate reports that will support SMART Delivery
		C. To ensure the process moves in a timely fashion	(1). Current delivery staff hours will be reconfigured to allow for dedicated drivers and dedicated sorters
		D. To develop Community Concept Partners	(1). Identify and develop 10 <u>20</u> Community Concept Partners based on geography and delivery volume
			(2). Solicit early adopters for the project



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		E. To support a delivery help desk	(1). Concerns submitted to the help desk will be dealt with by delivery staff in a timely manner
		F. To evaluate our service and determine areas of improvement and focus	(1). Administer an annual delivery survey

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DELIVERY			
Service Priority	Goal	Objective	Activities
Delivery Services		G. To quantify the impact of the delivery service	(1). Conduct <u>4</u> delivery item counts <u>yearly at regular intervals, in conjunction of RAILS/CARLI</u> using SHARE software <u>will be used for SHARE members, and manually manual counted counts</u> for items <u>for from</u> non-SHARE members
	2. Provision of accurate information and educational tools to support delivery	A. To revise the delivery section of the IHLs website	(1). Delivery section will be revised to include training materials that will be created to explain all aspects of delivery--- from packing a tub to filling out a label correctly
		B. To provide continuing education on delivery	(2). Utilize newsletters such as the SHARE newsletter and the Moving Forward Together newsletter to share delivery tips that will be designed to inform members of the practices in delivery
	3. Accurate member library data in L2 (Library Learning)	A. Quarterly review of member library data in L2 (Library Learning)	(1). Verify member data including route information after each counting period



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F. Illinois Machine Sublending Agency: In FY17, the Illinois Machine Sublending Agency (IMSA) will:

- Serve all persons eligible for service within the State of Illinois.
- Accept custodial responsibility for all audio players and accessories assigned to them.
- Support Braille and Audio Reading Download Services (BARD).
- Act as Outreach Provider in the southern part of the state.

<i>IMSA</i>			
Service Priority	Goal	Objective	Activities
IMSA Services	1. IMSA will serve all persons eligible for service within the state of Illinois as stipulated in the Lending Agency Service Agreement for Sound Reproducers and Other Reading Equipment (NLM 9.5). This is also in accordance with RSG Section 1, "Provision of Services;" and Section 2, "Resource Development and Management."	A. To comply with "Lending Agency Service Agreement for Sound Reproducers and Other Reading Equipment" from the National Library Service (NLM 5.8)	(1). IMSA will maintain regular business hours and provide service 40 hours per week as stipulated in RSG 1.5.b
		B. IMSA will accept custodial responsibility for all audio players and accessories assigned to them as stipulated in NLM 5.8	(1). IMSA will inspect and clean all returned equipment; perform minor equipment repairs; send items requiring more extensive repair to Telephone Pioneers or to the manufacturer for warranty
			(2). IMSA staff will clean and prepare for circulation; all returned playback equipment and accessories that are deemed to be in good working order and return them to available inventory



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IMSA			
Service Priority	Goal	Objective	Activities
<p>IMSA Services</p>			<p>(3). IMSA will seek assistance, advice and/or training from NLS, ISLTBBS, Telephone Pioneers or other appropriate group to ensure proper care and cleaning of playback</p>
		<p>C. IMSA will maintain inventory control over all sound reproducers and other reading equipment assigned to it and will provide statistics and reports with reasonable promptness as required in the MLA agreement (NLM 5.8)</p>	<p>(1). To keep machine and equipment records accurate and current in the KLAS system for efficient access and reporting</p>
			<p>(2). To make a monthly abbreviated report to NLS on the status of playback equipment, headphones, pillow phones, and remote control units assigned to it as stipulated in NLM 9.2.3</p>
		<p>D. Subject to availability, IMSA shall maintain sufficient inventories to ensure provision of playback equipment and accessories within 2 (two) business days of a patron application or request as stipulated in the MLA Service Agreement (NLM 5.8) and (RSG 1.2.b and 2.10.c)</p>	<p>(1). IMSA will continue to integrate digital machines into service according to nationwide NLS and statewide ISLTBBS guidelines, policies and recommendations as stipulated in RSG 1.2.c.</p>



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IMSA			
Service Priority	Goal	Objective	Activities
IMSA Services		E. To account for appropriate use of library equipment	(1). IMSA uses procedures established by NLS and ISLTBBS and other standard library practices to maintain proper inventory control of all equipment. Playback equipment records are maintained in KLAS as stipulated in RSG 1.3
			(2). To conduct an annual self-inventory following the records-purge process
		F. To act as Braille and Audio-Reading-Download (BARD)	(1). IMSA will respond to BARD inquiries in a timely manner. Responses will be made in a format convenient to the patron and may include oral instructions, written tutorials or instructions, links to video helps, and other formats. In the event an IMSA staff person is unable to effectively respond to a BARD inquiry, the patron will be instructed to contact the National Library Service BARD help desk
			(2). IMSA will maintain monthly statistics on the number of BARD inquiries received
			(3). IMSA will correspond with NLS regarding BARD and machine issues



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<i>IMSA</i>			
Service Priority	Goal	Objective	Activities
<p><i>IMSA Services</i></p>	<p>2. To participate in the planning, coordination and evaluation of Illinois Talking Book service, and to ensure appropriate provision of service by staying informed of current procedures and trends relating to Talking Books, the National Library Service/Library of Congress and librarianship in general. This is in accordance with the following sections of RSG: Section 3, "Public Education and Outreach covers developing and implementing a coordinated public awareness, education, and outreach plan;" Section 10, "Reports, Statistical and Narrative" covers reporting standards required to monitor LOC/NLS use and performance and to plan future initiatives; Section 11, "Personnel," covers staffing and employee development standards for network libraries</p>	<p>A. To act as outreach representative for events in the southern part of the state</p>	<p>(1). At the request of the ISL or the Illinois Talking Book Outreach Center, IMSA will act as outreach representative for events in the southern part of the state. Because IMSA is the southernmost Talking Books agency in Illinois, it is practical to act in the outreach capacity for southern Illinois</p>
			<p>(2). IMSA will market the Illinois Network of Talking Book and Braille Libraries through radio, and participation in outreach events throughout Southern Illinois</p>



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IMSA			
Service Priority	Goal	Objective	Activities
IMSA Services		<p>B. To participate in all planning meetings to coordinate and/or evaluate Talking Book services as provided by the Illinois Network of Talking Book and Braille Libraries. Meetings are either in person or virtual as determined by ISLTBBS and in accordance with RSG 11.12, which encourages continuing education and site visits for staff at all levels</p>	<p>(1). The manager and/or an appointed staff member will participate in quarterly meetings with the directors from each Illinois Talking Book agency (RSG 11.12.b)</p>
			<p>(2). As needed, the manager and/or staff will organize and/or attend any meetings and/or other coordinated efforts to develop, amend, or evaluate service to Illinois Talking Book patrons (RSG 10)</p>
		<p>C. To gain experience and knowledge about the Talking Books program and related topics in order to ensure appropriate provision of services and to provide accurate and current information to interested persons</p>	<p>(1). Take advantage of staff development opportunities that may enhance staff proficiency and efficiency. Due to shuttering of IMSA, these opportunities will be limited and focused on job training for staff</p>



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IMSA			
Service Priority	Goal	Objective	Activities
IMSA Services			(2). Closely monitor all correspondence from NLS/LOC and the ISLTBBS and work cooperatively with Talking Book Centers in the state to share information and ideas
			(3). Take advantage of staff development opportunities that may enhance staff proficiency, efficiency or morale (RSG 11.12)
	<p>3. To ensure efficient and successful provision of service in accordance with the following sections of the RSG: Section 5, "Volunteers," addresses issues related to the use of volunteer services; Section 6, "Administration and Organization," discusses the responsibilities of various agencies, administrative units, and network library types within the system; Section 8, "Planning and Evaluation," addresses long-range and strategic planning efforts and associated evaluation efforts; Section 9, "Policies and Procedures," relates to policies both for patrons and for library operations; Section 11, "Personnel," covers staffing and employee development standards for network libraries."</p>	<p>A. In accordance with RSG 6, IMSA will comply with: Laws and regulations pertaining to rights of and services to persons with disabilities; NLS policies and procedures, according to the direction of the Illinois Regional Library (ISLTBBS); and with sensitivity to the concerns of Illinois Talking Book patrons</p>	<p>(1). Provide all information and materials available to patrons in the requested accessible format (large print, audio, Braille or electronic)</p>
			<p>(2). The manager or an appointed staff member will attend ISLTBBS Advisory Committee meetings (RSG 11.13)</p>



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IMSA			
Service Priority	Goal	Objective	Activities
IMSA Services			(3). Maintain communication with the ISLTBBS and comply with all contractual and operational procedures
		B. IMSA's contract will be developed, fulfilled and guided by the stated needs of Illinois Talking Book patrons as determined by patron satisfaction surveys and input from the ISLTBBS Advisory Committee	(1). Quarterly and annual reports will document all progress made toward meeting Plan of Service objectives
		C. In accordance RSG 9, IMSA will follow written policies and procedures for operations designed to meet service goals and ensure consistent service for all Illinois Talking Book patrons	(1). Work with the ISLTBBS and Illinois TBCs to evaluate and revise existing policies as needed, and to develop statewide policies for distribution of any new format, including digital books and machines
			(2). Work with the ISLTBBS and Illinois Talking Book agencies to communicate service and distribution policies to patrons
			(3). Work with ISLTBBS to transition IMSA from Du Quoin to ISLTBBS
		D. In accordance with RSG 11, IMSA will employ qualified staff as an equal opportunity employer in compliance with all state and federal laws and NLS Standards, and will manage staff and facilities to efficiently provide the highest possible quality of service	



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IMSA			
Service Priority	Goal	Objective	Activities
<p>IMSA Services</p>			<p>(1). IMSA's administration reserves the right to organize or reorganize workflow and allocate or re-allocate the duties of new and existing employees as needed in order to efficiently provide quality service</p>
	<p>4. To account for the appropriate acquisition and utilization of funds, library materials and equipment provided by the Illinois State Library, Illinois State Library Talking Book and Braille Service, National Library Service/Library of Congress, and outside funding sources in accordance with RSG 7: "Budget and Funding," provides standards for managing and administering network library finances, and Section 10: "Reports, Statistical and Narrative," covers reporting standards required to monitor LOC/NLS use and performance and to plan future initiatives</p>	<p>A. Account for the appropriate utilization of funds</p>	<p>(1). The IMSA Manager, in cooperation with the IHLS Chief Financial Officer, will prepare a revised budget for FY16 including costs of shuttering the program for IMSA</p>
			<p>(2). The IMSA Manager will submit financial reports to Illinois State Library and Illinois State Library Talking Book and Braille Service quarterly</p>



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3.1 Operational Plan – Unmet Core Services

At this time, the Illinois Heartland Library System meets all core services as defined by the Illinois State Library through the System Area and Per Capita Grant. We strive to continually improve services to members as funding and technology allows.

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