Illinois Heartland Library System

FY2015 Plan of Service

The System Program provides a summary explanation of IHLS goals and objectives and provides a description of the planned activities for each programmatic area that is listed in the proposed IHLS budget. It supports the Illinois State Library's priorities and represents the annual element of the IHLS Strategic Plan.

Priority: Resource Sharing

Goal I: Provide an innovative resource discovery, sharing and delivery system:

Objective A: Encourage resource sharing

Activities

1. Monitor SHARE policy and protocol compliance and coordinate those policies with IHLS policies regarding resource sharing.

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 interlibrary loan for LLSAP members.

6. Provide training on how to effectively use tools for 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, interlibrary loan, reciprocal borrowing and reciprocal access as well as copyright will be addressed.

8. Promote WebJunction learning database to further promote continuing education on interlibrary loan, reciprocal borrowing, reciprocal access and copyright compliance.

9. Provide educational opportunities for libraries to understand their roles and responsibilities in Delivery and Resource Sharing in light of the recommendation from the respective statewide committees. It is anticipated that online and in-person formats will be incorporated to provide expanded opportunities for orientation and trainings in the areas of delivery, interlibrary loan, reciprocal borrowing, reciprocal access and copyright that will meet the needs of our multi-type membership.

10. Monitor the progress of member agencies in adopting the recommendations of the revisions in delivery and ILL policies and process.

11. Explore the cost and capability of interoperability with libraries independent of the LLSAPs.

12. Continue support of statewide initiatives designed to expand and enhance service to library patrons. This support would include the involvement of system staff, information dissemination, as well as updated or new training opportunities for staff of member libraries. An example would include partnering with stakeholders in planning for a statewide resource sharing summit.

13. The 2014 revision of the ILLINET Interlibrary Loan Code and the expected revision of System Standards provide a valuable opportunity for outreach to our membership. In conjunction with the IHLS Resource Sharing Policy, these documents will clarify roles, responsibilities and benefits for all participants. The "Best Practices" and Checklist information that will be a part of the ILL Code revision rollout will be a significant help. There are occasions that will come as a matter of course during FY 15 that will allow us to review and/or provide training in this area.

- Site visits ---to approximately 20% of our membership. This will be a special focus of visits to new library directors. ILL review will be documented as a component of each visit.

- SHARE trainings---as part of our grant (Growing Resource Sharing in IHLS through Growing SHARE) IHLS staff will have the opportunity to review ILL policies and procedures with new members. Contact with existing members will be made through other SHARE trainings. ILL review will be documented for each training.

- Annual Certification---Compliance with ILL is often a question asked of System staff. Information shared with membership regarding the certification process will include an overview of ILL roles and responsibilities for member libraries.

- System Communication Tools---There will be enthusiastic support for the ILL Code Revision and ILL compliance will be a regular topic.

- ILL Rollout: We have been successful in taking a single event "on the road" throughout the system and the code revision would be well suited to that type of presentation. Typically, we have chosen at least seven venues throughout the system and training would be documented through L2 and the registration lists. We would also contact the special interest groups that meet throughout the system ask that ILL training (with system staff) be placed in their agendas. That documentation would also come through L2.

- Staff Support: In addition to the activities outlined above, a number of staff members will be designated to provide specific support to libraries that would have challenges with full compliance.

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

Activities

1. Act as legal and financial authority for SHARE.

2. Manage the SHARE investment account.

3. Evaluate the impact of uniform cost sharing on all LLSAP members and consider a modified formula for FY2016.

4. Continue the evaluation of current LLSAP policies and the development of uniform policies for SHARE with the SHARE Executive Committee.   Analyze trends in data and in the library marketplace to determine opportunities for changes and enhancements of LLSAP Services.

5. Continue participation in the Statewide E-Books Grant opportunity.

6. Apply for appropriate grants to provide enhancements to the SHARE catalog.

7. Employ a variety of instructional methods to allow SHARE members to work effectively and efficiently with the ILS, and other shared databases.

8. Promote new membership in the SHARE LLSAP through the *Growing Resource Sharing in IHLS Through Growing SHARE* grant. IHLS will continually consider opportunities to more fully involve these members in resource sharing.

9. Assist with the migration of libraries who do not wish to continue to participate in the SHARE LLSAP.

10. Evaluate established criteria for SHARE LLSAP membership levels.

11. Continue to support the SHARE Helpdesk to track concerns and technical issues with the Polaris software.

12. Continue to offer SHARE member libraries special IHLS SHARE group purchase prices for common third-party database products (e.g. Gale, Ebsco, Library Ideas, World Book). Available products and pricing information will be funneled through SHARE staff to all SHARE members. Ordering and invoicing will be coordinated by SHARE staff, thereby providing an incentive to vendors. A $40.00 handling fee per database is assessed for cost recovery.

13. 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.

Objective C: Ensure the integrity of bibliographic records.

Activities

1. Maintain the requirement that all bibliographic records (with the exception of equipment, on order and E-book) must be OCLC derived records and have an OCLC control number to ensure database standards and mitigate duplicate records.

2. Support a Cataloging Center operation for SHARE Full members for copy and original cataloging of MARC bibliographic records and the creation of local authority records to enhance recovery. Service options are Cataloging Library (Full member meets continuing education requirements for cataloging staff and performs own cataloging); Barcoding A Library (Full member sends all new materials to Center for copy and original cataloging and assessed fee based on percentage of library's materials budget); Barcoding B Library (full member sends new materials as needed for original cataloging and assessed fee of $10 per item cataloged). Any item that meets the Cataloging Maintenance Center's (CMC) eligible collections criteria for free cataloging is passed on to the CMC.

3. Provide appropriate training for cataloging.

4. Evaluate the current methods utilized for ensuring the quality of the database through cataloging.

5. Evaluate the efficacy and fee models associated with the Cataloging Center operation for possible revision.

Objective D: Operate Cataloging Maintenance Centers on behalf of libraries in Illinois.

Activities

1. Fulfill NACO (Name Authority Cooperative Program of the PCC) obligation by creating a minimum of 100 name or uniform title authority records per year.

2. Continue support of LLSAP database cleanup efforts in LLSAP.

3. Cooperate with Illinois State Library staff to identify statewide cataloging needs and develop strategies to meet them, prioritizing statewide initiatives that require cataloging expertise to ensure statewide access and resource sharing assistance with projects as agreed upon.

Priority: Delivery

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

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

Activities

1. Working in concert with ISL, RAILS and CARLI, continue the implementation of recommendations from the Delivery Advisory Committee.

2. Conduct quarterly counts of library materials and continue to refine the counting methodology.

3. Sort materials daily to ensure all materials are distributed during the next scheduled delivery.

4. Develop methods to deliver training to member libraries on labeling, packaging, and other preparation of library materials with the goal of improving delivery time.

5. Working in concert with ISL, RAILS, and CARLI, collect relevant delivery statistics and use them to improve and promote the service.

6. Continue to work collaboratively with RAILS to minimize size and type of tubs and other delivery containers, and number of different routing slips used.

7. Evaluate the average turn-around time that an item is in the IHLS delivery system and adjust as necessary, with the goal of reducing the time it takes for library patrons to receive requested library materials.

8. Conduct an annual delivery satisfaction and needs survey of member libraries and solicit recommendations from individual member libraries. Adjustments will be made based on need and feasibility.

9. Evaluate the current delivery routes and adjust as needed to improve delivery efficiency using the fleet management system.

10. Evaluate and modify, as needed, the IHLS delivery standards to improve delivery services to member libraries.

Objective B: Leverage existing delivery resources.

Activities

1. Evaluate the current delivery efficiency.

2. Optimize sorting processes.

3. Follow the delivery replacement schedule in which fleet vehicles are replaced when mileage exceeds 200,000 miles.

4. Develop and implement improved hiring practices and training for courier drivers and sorters that will include best practices in customer service, driving safely, ergonomics, and the handling of library materials.

5. Evaluate direct and overhead costs for sorting and delivery.

In FY 15

- In addition to the routine workings of SHARE and other aspects of resource sharing, much energy in the upcoming fiscal year will be devoted to the implementation of the "*Growing Resource Sharing in IHLS Through Growing SHARE*" grant. This activity will involve staff at all levels as the grant is promoted and libraries are brought into the LLSAP.

- Consistent attention will be paid to the implementation of the recommendations of the statewide delivery committee. While this will involve change at the system level, it will also involve significant training for the membership. This will be supported at the system level by focused communication and multi-formatted training.

- Another focused area of activity will be the dissemination of the revised Interlibrary Loan Code. Changes and revisions will need to be highlighted and communicated in multiple ways to the membership.

- The continued promotion and growth of E-Read Illinois will be an additional focus of system services.

Priority: Illinois Machine Sublending Agency

Goal III: Provide good customer service and well maintained machines to patrons of the Talking Books Program.

Objective: Support the statewide machine lending program located in DuQuoin.

Activities

1. Contract with the Illinois State Library to manage statewide services.

2. Serve all persons eligible for service within the state of Illinois as stipulated in the agreement with NLS.

3. Participate in the planning, coordination and evaluation of Illinois Talking Book Service, and ensure appropriate provision of services by staying informed of current procedures and trends related to Talking Books, the National Library Services/Library of Congress and librarianship in general.

4. Ensure the efficient and successful provision of service in accordance with the Revised Standards and Guidelines.

In FY15

- The department will move forward with new leadership and significant staff turnover.

Priority: Provide timely and pertinent information to member libraries

Goal IV: Effective and efficient communications with member libraries and partners.

Objective A: Provide various mechanisms to ensure good communications with member libraries and partners.

Activities

1. Hold face-to-face meetings to discuss system benefits as well as those benefits available to SHARE members.

2. Conduct an audit of IHLS communications to identify which communications are working well and which ones need improvement, and to identify other options or solicit suggestions.

3. Conduct visits to 20% of our more than 550 agencies. This goal would give IHLS staff the opportunity to arrange approximately 110 on-site visits. A particular area of focus would be those library agencies who have recently seen a change in leadership. Another target audience would be those libraries facing any challenges that might impact their membership status and their ability to receive system services. Also in consideration would be conversations with library boards or other administrative bodies who might request specific information from IHLS. School staffing has shifted dramatically in the last several years and working to ensure that population is informed about system services and membership criteria would have a broad-based impact. When appropriate, system staff will also be available to meet with special interest groups for the purpose of discussing membership criteria and system services.

4. Develop and organize internal tools that can be made available for staff meeting with membership. These would include information for new directors, system brochures, Talking Books information, etc.

5. Convene the Library Advisory Council.

6. Maintain an interactive website to assist member libraries in effective utilization of IHLS services and promote member forums.

7. Utilize web conferencing tools to support member communications such as Connect with Leslie which uses the Adobe Connect platform.

8. Investigate feasibility of a membership web portal to consolidate information that is relevant to each member. The purpose of this portal would be to make agency specific information available for each member library.

9. Plan for an upgrade/replacement of the video conferencing equipment in Edwardsville.

In FY15

- In concert with membership, system staff will strive to make communication with stakeholders as efficient and timely as possible.

- The role and function of the Advisory Council will be clarified.

- Attention will be given to the data collected from membership, what is still needed to better serve them and how best to organize and store that information effectively and efficiently.

Priority: Administrative Activities

Goal V: Ensure effective utilization of IHLS resources

Objective A: Ensure fiscal accountability

Activities:

1. Support the business operations of IHLS through monthly financial reports, payroll, accounts payable, and accounts receivable.

2. Review the financial policies and procedures and adjust as necessary.

3. Support management decisions through the development of budgets and the analysis of financial information.

4. Explore options for electronic payment of bills by libraries as well as electronic payments by IHLS.

5. Complete the development of a long-range plan founded on the core services supported by ISL and begin implementation. The plan will identify cost saving and revenue generating measures consistent with IHLS mission and goals.

6. Dispose of surplus equipment in a manner consistent with Illinois State guidelines.

7. In concert with the Illinois State Archives, continue to consolidate, archive and/or dispose of legacy and current system records. Order of preference is DuQuoin, Champaign and Edwardsville. Activity in this area focused on the facility moves from Carterville to Du Quoin and from Decatur to Champaign.

8. Maximize use of new accounting software to achieve improved financial record keeping.

9. Continue consolidation of all IHLS administrative records to a single location for efficiency. Establish an administrative file structure that follows a records retention schedule set by the Illinois State Archives and provides remote access for staff at other locations.

10. Provide cost recovery based continuing education opportunities for member libraries using external facilitators or presenters.

11. IHLS will ensure that at least one IHLS staff member and one board member attends one Illinois State Library or system training event in FY15.

12. Based on the consulting services plan developed in FY14, continue to explore opportunities for implementation in concert with the long-range plan.

13. Maintain IT support for IHLS staff including support of videoconferencing and Adobe Connect, as well as computer and server support.

14. Develop and implement a detailed telecommuting policy.

15. Continue to move services to our co-location facility in Champaign at the ICN POP site. All of the Polaris servers are located in the co-location site and other state-wide services such as Plinkit, DNS and other administrative websites will be moved there.

Objective B: Employ qualified, professional, accountable staff.

Activities

1. Recruit and employ qualified personnel of diverse backgrounds to carry out the mission and goals of IHLS. Increase the applicant pool by participating in local community events, college job fairs and advertising current openings with culturally diverse media and professional organizations.

2. Continue development of the evaluation process and assign goals for 2015. Supervisors will have quarterly one-on-one meetings with employees to ensure each employee is on track with goals.

3. Develop and implement performance-based salary adjustments.

4. Implement an enhanced hiring process. Train managers/supervisors on interviewing techniques and tools. Create and implement employee orientation at all locations.

5. Provide training to staff in areas of management and content specific to their areas of responsibility. Develop a manager/supervisor 101 training to include employment law, employee relations, performance management and IHLS personnel code.

6. Seek and encourage participation in continuing education opportunities for staff as appropriate. Consider tuition reimbursement or enroll IHLS in Star program which enables employees to attend workshop or courses for one fee.

7. Provide all-staff training retreat focused on staff collaboration and customer service.

8. Continue monthly staff meetings as well as expand the Hi-Five local meetings that can update staff in each location about weekly activities.

9. Develop and implement a wellness program.

Goal VI: Partner with the Illinois State Library and other organizations to support statewide services.

Objective A: Maintain the accounting operation for the ILLINET OCLC grant.

Activities

1. Ensure adequately trained, professional staff are assigned to this project.

2. Provide required grant applications and reports in a timely manner.

3. Provide administrative support.

Objective B: Work cooperatively with ISL, RAILS and other stakeholders to provide excellent library services.

Activities

1. Support member libraries in working through the EDGE initiative process.

2. Partner with statewide stakeholders in planning the combined "Library State of Mind" Conference for the fall of 2015.

3. Explore opportunities for shared services in the consulting and continuing education areas.

In FY 15

- The development and adoption of a long-range plan will give refreshed direction to all system services.

- As methods for providing continuing education and consulting services are explored, it is expected that partnership with ISL and RAILS will be expanded.   As a beginning step, a "Member Day" will be planned for the fall of 2014, exploring library issues through breakout sessions. This will be held on a cost-recovery basis.