

Strategic Plan - FY2012 Illinois Heartland Library System

Operational Operate a financially sustainable and efficient organization.
Leverage the resources – material, personnel and fiscal – of the

Goal 02 Ensure good communications among member libraries and partners

Objective 1 Provide regular opportunities to interact with members.

Activity 01 Hold regional face-to-face meetings to discuss issues of importance to the membership and IHLS.

Activity 02 Evaluate system services through connecting directly with each member library.

Activity 03 Maintain a member database to enhance communications with members.

Activity 04 Utilize webconferencing tools to support member communication

Activity 05 Evaluate the current videoconference network. Consider the best options for videoconference services that is both easy to use and cost effective to operate.

Activity 05 Support training and use and ongoing support of communication tools.

Activity 06 Develop and convene Regional Library Advisory Councils.

Objective 3 Maintain an up to date website for use by member libraries.

Activity 1 Create an interactive website to assist member libraries in effective utilization of IHLS services.

Activity 2 Maintain relevant content of the previous system web sites and develop a plan to transition content to the IHLS website.

Goal 1 Operate a financially sustainable and efficient organization.

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Objective 4 Employ qualified and quality employees for IHLS.

Activity 01 Contract for a salary and compensation study including position descriptions.

Activity 02 Complete hiring process'

Activity 03 Recruit and employ personnel of diverse backgrounds to carry out the Strategic Plan and the Annual Plan of IHLS.

Activity 04 Develop a process to evaluate staff.

Activity 05 Provide training to staff in evaluation, legal and such areas needed.

Activity 06 Provide training for job functions as needed.

Strategic Direction I Create dynamic and innovative resource discovery, sharing, and distribution services.

Goal 1 Provide a framework for members to participate in a "state of the art" integrated library system.

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Objective 1 Support the continuation of 4 shared automation systems for libraries during FY2012.

Activity 01 Act as legal and financial authority for the four LLSAPs (Gatenet, SILNET, LINC and RPLS LLSAP) in IHLS

Activity 02 Maintain the reserve funds for each LLSAP in separate fiduciary funds and shared operation costs for each LLSAP in separate enterprise funds.

Activity 03 Maintain the existing member policy and users groups to provide shared oversight and policy and protocols development for the LLSAPs.

Activity 04 Monitor LLSAP policy and protocol compliance with LLSAP policies and coordinate those policies with IHLS policies regarding resource sharing.

Activity 05 Assure that security is maintained for the LLSAPs and ensure that frequent data back up is continued.

Activity 06 Partner with the personnel of the Illinois Century Network to maintain and improve bandwidth for access to LLSAP services.

Activity 07 Provide appropriate training for LLSAP members.

Activity 08 Assist as time allows the migration of libraries who do not want to continue to participate as an LLSAP member.

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Objective 2 Develop a plan to consolidate the shared systems during FY2012.

- Activity 01** Evaluate the current shared cost formula's of the LLSAPs to develop a uniform formula by January 2012.
- Activity 02** Explore the impact of the new uniform cost sharing formula on all LLSAP members
- Activity 03** Evaluate current LLSAP policies and develop uniform policies for the new consolidated LLSAP.
- Activity 04** Continue the evaluation and selection of a vendor to support the consolidated LLSAP with anticipated completion by of selection during the first quarter of FY 12.
- Activity 05** Determine how the purchase cost of a new platform and the migration data will be shared by the LLSAP automation reserve funds.
- Activity 06** Ensure that new consolidated LLSAP equipment can be housed at the ICN POP at UIUC.
- Activity 07** Apply for appropriate grants to assist with enhancing and migrating to a consolidated LLSAP.
- Activity 08** Develop a new Memorandum of Understanding/Agreement for all LLSAP participants.

Objective 3 Encourage IHLS members to participate in the LLSAPs.

- Activity 01** Promote the benefits of membership in the LLSAP.
- Activity 02** Provide a quarterly information program for school libraries about the benefits of being an LLSAP member.
- Activity 03** Evaluate the various levels of memberships of the current LLSAP and consider the best method to address membership levels.

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Objective 4 Begin the transition from four separate ILS platforms to a common platform.

Activity 01 Begin migrating at least two of the current LLSAPs to a shared platform.

Activity 02 Complete the migration of at least one of the current LLSAPs to the new shared platform

Activity 03 Ensure that the consolidated LLSAP can adequately support the all the functionally needed by the members and is adequate to support this LLSAP service for at least 5 years.

Activity 04 Ensure that the consolidated LLSAP can support current LLSAP services as well as new service components such as full text.

Activity 05 Provide face to face and online training to all LLSAP members as the migration proceeds.

Activity 06 Utilize the agreed shared policies and protocols for the implementation of the consolidated LLSAP.

Activity 07 Agree on a name for the new consolidated LLSAP.

Activity 08 Maintain Training support materials on the IHLS website.

Illinois Heartland Library System FY2012

Program: Administration

1. Act as legal and financial authority for the four LLSAPs (Gatenet, SILNET, LINC and RPLS LLSAP) in IHLS
2. Evaluate the current shared cost formula's of the LLSAPs to develop a uniform formula by January 2012.
3. Explore the impact of the new uniform cost sharing formula on all LLSAP members
4. Determine how the purchase cost of a new platform and the migration data will be shared by the LLSAP automation reserve funds.
5. Support the statewide machine lending program in Carterville.
6. Maintain the accounting operation for the ILLINET OCLC grant project in Champaign location during FY 12
7. Support WebJunction for all libraries in Illinois.
8. Support the business operations of IHLS through monthly financial reports, payroll, accounts payable, accounts receivable, budgeting, and financial analysis.
9. Explore options for credit card and electronic paying of bills for libraries and electronic payment for IHLS
10. Evaluate the current cost formulas of the LLSAPs' and develop a single formula for a single LLSAP.
11. Hold regional face-to-face meetings to discuss issues of importance to the membership and IHLS.
12. Evaluate system services through connecting directly with each member library.
13. Utilize webconferencing tools to support member communication
14. Evaluate the current videoconference network. Consider the best options for videoconference services that is both easy to use and cost effective to operate.
15. Support training and use and ongoing support of communication tools.
16. Create an interactive website to assist member libraries in effective utilization of IHLS services.
17. Develop and convene Regional Library Advisory Councils.
18. Contract for a salary and compensation study including position descriptions.
19. Complete hiring process'
20. Recruit and employ personnel of diverse backgrounds to carry out the Strategic Plan and the Annual Plan of IHLS.

**Illinois Heartland Library System
FY2012**

Program: Administration

21. Develop a process to evaluate staff.
22. Provide training to staff in evaluation, legal and such areas needed.

Illinois Heartland Library System FY2012

Program: Delivery

1. Evaluate outsourcing for IHLS delivery service.
2. Participate with ILA in their study for delivery.
3. Explore options to provide library door-to-door services in IHLS within 1 - 2 business days.
4. Implement the IHLS Delivery standards.
5. Develop a replacement schedule for delivery vehicles.
6. Develop a maintenance program for the delivery fleet.
7. Sort materials daily to ensure all materials are distributed during the next scheduled delivery.
8. Provide online tools for delivery training for member libraries.
9. All vehicles of over 200,000 miles should be reviewed based on maintenance records for considered replacement.
10. Replace a minimum of 6 vehicles depending on maintenance review.
11. Provide a comprehensive safety program that is required of all delivery personnel.
12. Determine and utilize best practices of each delivery hub location for implementation in all delivery hubs.
13. Maintain 4 locations for ILDS service provision.
14. Determine and utilize best practices for ILDS of the delivery hubs for implementation in all hubs.
15. Collect relevant delivery statistics and use them to promote the service.
16. Evaluate the current delivery routes for delivery efficiency.
17. Evaluate the average turn-around-time that an item is in the IHLS delivery system.
18. Analyze trends in statistical data to determine opportunities for changes and enhancement in the delivery service program.
19. Evaluate the types of delivery vehicles needed for various route volumes.
20. Conduct one user survey regarding delivery and resource sharing satisfaction -- one survey for all LLSAPs.
21. Determine the best delivery containers for various volume libraries and begin a planned implementation over 3-4 years.

Illinois Heartland Library System FY2012

Program: Resource Sharing

1. Monitor LLSAP policy and protocol compliance with LLSAP policies and coordinate those policies with IHLS policies regarding resource sharing.
2. Explore the impact of the new uniform cost sharing formula on all LLSAP members
3. Promote the benefits of membership in the LLSAP.
4. Provide a quarterly information program for school libraries about the benefits of being an LLSAP member.
5. Continue to support cooperative purchase of "overdrive" to LINC LLSAP members and those members in Gatenet, SILNET and RPLS that have the product.
6. Conduct one user survey regarding delivery and resource sharing satisfaction -- one survey for all LLSAPs.
7. Assist member public libraries in promoting their participation in Reciprocal Borrowing within IHLS and statewide.
8. Monitor Reciprocal Borrowing activity and ensure the parameters of the Resource Sharing Policy are followed.
9. Maintain current interlibrary loan and document delivery procedures on the IHLS website.
10. Provide a means for LLSAP members to borrow directly in any of the four LLSAPs.
11. Maintain non resident borrower card purchase location on IHLS Website.
12. Encourage non OCLC member libraries to join OCLC in order for IHLS residents to discover the materials owned in all IHLS libraries.
13. Identify vendors that support resource sharing for electronic resources.
14. Monitor Digital Rights Management issues.
15. Support and expand the digitized content (e.g. Digital Gems) for all interested libraries in IHLS.
16. Encourage libraries to participate in digitization projects to enhance resource access.
17. Explore the opportunities to make necessary linkages to access open freely available digital content to the LLSAP to promote sharing and access.
18. Provide training for library library staff on how to effectively use the resource sharing tools of the LLSAP.
19. Promote the resource sharing capabilities of the LLSAP to all member libraries.
20. Support patron initiated interlibrary loan for LLSAP members.
21. Continue the membership levels for SILNET and Gatenet to allow search and place hold access for non LLSAP members.

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Program: Resource Sharing

22. Provide training on how to effectively use tools for Interlibrary Loan beyond the LLSAP using OCLC and other appropriate discovery services.
23. Support opportunities to learn about copyright as it relates to interlibrary loan.
24. Ensure that library staff understand the responsibilities for the handling of interlibrary loan materials.
25. Explore the cost and capability of interoperability with libraries automated independent of the LLSAPs.

Illinois Heartland Library System FY2012

Program: LLSAP

1. Act as legal and financial authority for the four LLSAPs (Gatenet, SILNET, LINC and RPLS LLSAP) in IHLS
2. Maintain the reserve funds for each LLSAP in separate fiduciary funds and shared operation costs for each LLSAP in separate enterprise funds.
3. Maintain the existing member policy and users groups to provide shared oversight and policy and protocols development for the LLSAPs.
4. Monitor LLSAP policy and protocol compliance with LLSAP policies and coordinate those policies with IHLS policies regarding resource sharing.
5. Evaluate the current shared cost formula's of the LLSAPs to develop a uniform formula by January 2012.
6. Explore the impact of the new uniform cost sharing formula on all LLSAP members
7. Evaluate current LLSAP policies and develop uniform policies for the new consolidated LLSAP.
8. Continue the evaluation and selection of a vendor to support the consolidated LLSAP with anticipated completion by of selection during the first quarter of FY 12.
9. Determine how the purchase cost of a new platform and the migration data will be shared by the LLSAP automation reserve funds.
10. Support the CMC operations at Edwardsville and Champaign.
11. Ensure that new consolidated LLSAP equipment can be housed at the ICN POP at UIUC.
12. Assure that security is maintained for the LLSAPs and ensure that frequent data back up is continued.
13. Partner with the personnel of the Illinois Century Network to maintain and improve bandwidth for access to LLSAP services.
14. Promote the benefits of membership in the LLSAP.
15. Provide a quarterly information program for school libraries about the benefits of being an LLSAP member.
16. Evaluate the various levels of memberships of the current LLSAP and consider the best method to address membership levels.
17. Apply for appropriate grants to assist with enhancing and migrating to a consolidated LLSAP.
18. Begin migrating at least two of the current LLSAPs to a shared platform.
19. Complete the migration of at least one of the current LLSAPs to the new shared platform
20. Ensure that the consolidated LLSAP can adequately support the all the functionally needed by the members and is adequate to support this LLSAP service for at least 5 years.

Illinois Heartland Library System FY2012

Program: LLSAP

21. Ensure that the consolidated LLSAP can support current LLSAP services as well as new service components such as full text.
22. Provide face to face and online training to all LLSAP members as the migration proceeds.
23. Provide appropriate training for LLSAP members.
24. Assist as time allows the migration of libraries who do not want to continue to participate as an LLSAP member.
25. Utilize the agreed shared policies and protocols for the implementation of the consolidated LLSAP.
26. Agree on a name for the new consolidated LLSAP.
27. Maintain Training support materials on the IHLS website.
28. Offer Support cataloging functionality for the individual LLSAPs in much the same method as they received in FY11.
29. Evaluated the current methods utilized for ensuring the quality of the database through cataloging and seek to offer appropriate levels of cataloging support in the consolidated LLSAP.
30. Provide appropriate training for copy cataloging and for bar code certification.
31. Maintain the bar coded certification program in RPLS and Gatenet.
32. Maintain the requirement that all bibliographic records must be OCLC derived records and have an OCLC control number to ensure database standards and mitigate duplicate records.
33. Support a Cataloging Center operation for the LINC LLSAP members for copy and original cataloging of MARC bibliographic records, creation of local authority records.
34. In preparation for a consolidated catalog perform a "reclamation" of the SILNET catalog with OCLC.
35. Encourage libraries to utilize the ISL supported Cataloging maintenance centers.
36. Perform regular database cleanup (merging duplicate records, eliminating non-MARC records, error correction for all LLSAP databases.
37. Provide opportunities for LLSAP members to utilize services cataloging operations of other LLSAPs as needed or available.
38. Batchload bibliographic records to OCLC daily or via TMQ on a quarterly basis.
39. Provide LLSAP software support for the participating libraries.
40. Provide LLSAP technical support for the participating libraries.
41. Utilize online tools such as adobe connect to provide software support.

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Program: LLSAP

42. Migrate customer support calls to a support database and consider using the product utilized by Gatenet.
43. Continue to support cooperative purchase of “overdrive” to LINC LLSAP members and those members in Gatenet, SILNET and RPLS that have the product.
44. Provide online discounts to LLSAP members for purchasing library materials.
45. Explore expanding the “partnership” program between B & T and OCLC to all IHLS LLSAP members.
46. Maintain all cooperative e-resource licensing programs that were in existence in FY 11.
47. Develop a broad e-resource sharing LLSAP program that includes a wide variety of types of resources for libraries.
48. Evaluate vendor policies on licensing.
49. Support training for utilization of e-resources.
50. Develop a new Memorandum of Understanding/Agreement for all LLSAP participants.
51. Provide a means for LLSAP members to borrow directly in any of the four LLSAPs.
52. Explore the opportunities to make necessary linkages to access open freely available digital content to the LLSAP to promote sharing and access.
53. Provide training for library library staff on how to effectively use the resource sharing tools of the LLSAP.
54. Analyze trends in data and in the library market place to determine opportunities for changes and enhancement of LLSAP services.
55. Consider offering LLSAP members a shared event calendaring and registration, meeting room booking, summer reading management and staff scheduling.
56. Support patron initiated interlibrary loan for LLSAP members.
57. Explore the cost and capability of interoperability with libraries automated independent of the LLSAPs.
58. Evaluate the current cost formulas of the LLSAPs’ and develop a single formula for a single LLSAP.