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STEF: Hi, everybody. Welcome. This is Stef Morrill. Thanks for attending our webinar. This is the second in our series—learning from other states about their public library systems, multitype library systems, and how their systems were reorganized or consolidated.

We have two speakers with us today from the library and system level perspectives. Amanda McKay is the director of the Helen Mathis Library, and has also worked as a special coordinator with multiple library systems in Illinois...

Dee Brennan has been in Illinois for six years. She [was] the executive director of the Oak Park Public Library right outside of Chicago with a population of 53,000 and an \$8 million budget. She is now with a multitype library system in Illinois. Previously, she was in Massachusetts (who we heard from last week)s and was very involved with systems in ILS consortia.

After being a director at several libraries, she was the Chief of Public Services at the Boston Public Library, and also ran their system, the Boston Regional Library System. She was involved with the statewide strategic planning that took Massachusetts from a three public library system to six multitype systems.

Those of you who were on the webinar last week—we learned about that very change. It is very interesting that Dee has that Massachusetts connection, as well. Both Amanda and Dee have library and system-level perspectives, so I think they'll have a lot to [talk about] today. I'm going to go ahead and turn it over to Dee and Amanda. Please type any questions that you have into the questions area. I will collect those, and we will have a Q&A after Dee and Amanda are done presenting. Thank you very much.

A SHORT HISTORY OF ILLINOIS SYSTEMS

AMANDA: Thanks everyone. This is Amanda, and I'm going to kick things off with just a little history of Illinois systems. I think that there should be some slides up on your screen now. The systems in Illinois launched in 1965 when the Illinois Library Systems Act was signed into law, but the groundwork was laid about five to ten years prior trying to assess the situation in Illinois.

The library systems originally began as public library systems exclusively, and they began because of the dire situation of public libraries in Illinois up to the 1960s. The funding was poor. The output was poor. [Nothing] was as strong as it could be. Just like all [library systems] across the country around this time period, they were looking for ways to make things better; and so, the Illinois Library Systems Act became law.

What's a little bit unique about the law that was signed (that I think is a little bit different from other states and how they approached it) is that the entire area of the state had to be served by a public library system. This resulted in a first attempt at universal library service. We still have plenty of areas that are not served, [although] every area of the state [is supposed] to be served.

The original suggestion was [to form] twenty-one systems, but in the end, eighteen were settled on, and that covered the entire state with library service. There were some basic services that

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were expected to be delivered, and it was mostly centered around making sure that the unserved areas had access to public library service—so all of the library systems had bookmobiles. I think the last [bookmobile used was] in the 1990s. These systems were also suggested because of the lack of cooperation and innovation. That was a key role that the library systems were asked to fill.

When we got started, there were eighteen systems. In 1991, there were some mergers that did take place, [and] we went down to twelve systems; but again, the whole state was still served. There were some additional mergers throughout the years. When I came into Library Systems, they had just merged down to nine library systems. In between, they had also become multitype. They had expanded their mission.

I came in around 2004, which is when there were nine multitype library systems. In 2010 was the most recent merger, and it resulted in two library multitype systems: the Reaching Across Illinois Library System (otherwise known as RAILS) and the Illinois Heartland Library System, which we just call Heartland or ILHS. And again, we're still complying with the original intent of the act, which is to serve every square inch of the state.

RESOURCE SHARING IN ILLINOIS

DEE: Hi, everybody out there. You should see a slide now that says Resource Sharing in Illinois. I was asked by Stef to participate in this webinar to talk about system services and the effects of the merger from the library point of view. It is kind of ironic, as Stef explained, that Amanda is now at a library, but that's kind of the way things are working in Illinois these days. There's a lot of change going on [and] a lot of upheaval.

When I was in Massachusetts (which was up until 2006, as Stef said) I was very involved in resource sharing and systems work. In the nineties, we had three public library systems, and we were working on them becoming multitype library systems. One of the things that we did when we got additional funding from the legislature was we brought in librarians, system leaders, and experts from around the country to tell us how to do it [in] the best possible way. Some of the people that were brought in were Illinois system directors at the time.

A few years later when I came to Illinois, I was expecting to see the same kind of leadership and innovation. Unfortunately, back in 2006 and after, that just wasn't happening, because the funding had not increased in years and years. In fact, I think the early 1980s was the last time that the system got an increase.

At the time, the system services that we got at libraries, before 2010 and as librarians were very robust. We had a lot of continuing education and consulting services [available to us], particularly for small libraries. The systems also oversaw, founded, funded, and managed the shared catalogs that we have in Illinois. So, the services were great. [I didn't see] a lot of true collaboration among systems, and therefore not a lot of change in leadership and planning was happening.

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Another complicating factor, I think, in Illinois is that we have the most individual government entities in the entire country. It's more than 2,000. I don't know the exact number. Libraries, therefore, have a lot of autonomy, and that can be excellent if you're in a community that has a good funding base, but sometimes [there is a] conflict. If you have a very [wealthy] library in one town and it's right next door to a not so [wealthy] library, that can really impede the resource sharing.

There certainly has been a very strong tradition of resource sharing historically among libraries. I have heard many stories about Hugh Atkinson, who was the Director of the University of Illinois at Champaign Library back in the sixties. He was a big proponent of resource sharing, even though he ran one of the biggest libraries in the state. He was a real visionary about that. As Amanda described, the systems have been in existence for a long time. At the beginning, the Illinois Library Association did take a very strong role in the development of the system laws and the systems themselves, and that has continued to this day as you will hear later on in our presentation.

Amanda and I are now going to each talk about the impact of the mergers. Amanda, maybe you want to talk about it from the service perspective, because you were there. You were experiencing it very personally and first-hand.

IMPACT OF THE MERGERS

AMANDA: I was. When I first started in libraries, I started off working as a database coordinator for Lincoln Trail Library System, which was originally based in the Champaign area in the east central part of the state. I became a consultant for that area. I then split my time 50 percent as a consultant just for the libraries within that area of the Lincoln Trail Library System, and then the other 50 percent of my time was as a special projects coordinator for all nine of the library systems. I began that job in 2005 or 2006. That's when I started working with all nine of the library systems together. I had a front-row seat to what was happening, and what the systems were trying to do in terms of navigating all of the changes in service and the loss, [decreases and uncertainty] of funding.

[As of] May of 2010, all of the systems directors got together every other month. Usually the State Library was available to us. [At that time], we were having one of our regular meetings and again, the topic of conversation was what [we could] do to consolidate. Here are some plans. Here are some thoughts. How could we better work together to maximize efficiencies in delivery, continuing education and resource sharing?

During that meeting, we found out from the State Library that we were out of time, essentially. The payment delays in Illinois at that point of time were reaching a critical tipping point. I believe at that point we were six months behind schedule with nothing on the horizon for at least a year. They had warned us that it could be up to a year before we saw any payments on the grant. They said that the systems needed to merge, and that they wanted the systems to do it on their own—that they wanted the systems to take the lead. They wanted it to be membership and board driven. That way the membership was in control of what was happening.

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That was a tough meeting, obviously. As a result, one of the library systems (the one that was struggling the most financially to pay their bills) actually closed their doors a week later. That meant that delivery in that area stopped. The resource sharing was being handled within the individual libraries, anyways. The continuing education stopped. The consulting stopped. Everything stopped. Those libraries did band together, and they were able to resurrect their delivery service. Dee will talk more later about how those libraries came back into the fold to receive the basic services.

It was a really trying time. [At that time], at the location I worked at (I had switched down to the St. Louis area on the Illinois side of the river) we were told that since we were working in a nonessential service (which would be consulting) we were laid off effectively May 30. And we weren't the only system. I think four of the nine systems experienced layoffs immediately or within a couple of months. Then all of the systems eventually experienced some sort of layoffs or attrition.

That was the immediate impact. In some systems, it was an immediate loss of services. In other systems (the systems that I lived in, which are in the more rural part of the state, down in the southern part) we experienced the loss of consulting services, which was huge for our area. A lot of the librarians in our area had not attended a library school program. For others, it had been so long, that [that they couldn't rely on] the library systems to provide that kind of consulting (so that we were compliant with the laws, rules, and regulations [and] wouldn't miss out on grant funding, other opportunities and just basic compliance). We were no longer allowed to provide that service anymore.

DEE: I'm now going to talk about my perspective on the mergers and the events of 2010. As a consumer of systems services, you can hear from Amanda's description [that] it was very traumatic for the individuals and the libraries. It really seemed as if systems and services began to disappear overnight. As Amanda describes, one of the systems (specifically the North Suburban Library System) got e-mails that it was closing. Then layoffs came. It was very traumatic, personally, to lots of us because we knew these people. They were our colleagues, as well as our libraries, losing these services on a regular basis.

Then it was just very uncertain. There were certain points at which we didn't know if they were actually going to survive at all. In the system that I was part of at the time (the Metropolitan Library System) there was an actual plan made [based on us needing] this much money and this much time in order to, [in an orderly fashion], close down a building, pay staff their severance or get them the benefits that they had earned and achieved. It was really sort of a doomsday scenario [at] the time.

At the same time that, as Amanda describes it, the State Library was telling the systems that they had to merge; again, from my perspective as a member librarian, it would have been more desirable, I thought at the time, that there [be] more direction from the State Library. I think you probably heard from Greg Pronevitz last week that, if I understand what happened in Massachusetts, there were more people that decided there would be one system, as a directive. We didn't really get that; but we now have our two systems. The southern system (Heartland) consists of four legacy systems, and RAILS [consists of] five legacy systems.

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There was some uncertainty for at least part of 2010 as to whether the middle area there (the Alliance Library System near Peoria) would be in the southern system or the northern system. There were just so many things, that we had taken for granted and relied upon, that had been very foundational. [Now], not only did they not exist, but we had no way to know what the future [looked] like.

Then what happened was we did get some planning direction from the big library we had. According to the State Library laws, there was a process of rules that were laid out for mergers. The word that was used a lot was "suspension of services." We couldn't close. We could suspend services. We were really paying a lot of attention to the legal requirements.

Merger transition boards were appointed by the existing boards of the existing systems, and those boards worked on compliance, as did the staff. Compliance was all of these legal requirements over the course of about six months. They did have a consultant to help them. I'm sure you can imagine what it was like to merge six accounting systems, etc. It was an incredible amount of work [and] at the same time, there was hardly any staff left to do the work. It was a very difficult time.

ILA STATEWIDE PLANNING PROJECT

At the same time that this was going on, the public policy committee of ILA had launched in 2009 a planning initiative. [There was] concern on the part of some of the member leaders on the board (and of the public policy committee) that there had been no real planning done on a statewide basis for a long time. They did get a grant from the State Library to put together a summit in 2009 that brought together seventy-five library leaders. We looked at the future of library cooperation in Illinois. This group then formed a steering committee, and we appointed three task forces to look at the future structure, funding and services of systems.

Of course, this was simultaneous with the actual breakup and disintegration of the systems themselves. It was difficult to coordinate the planning efforts, because one was so focused on compliance (as they had to be) and the short-term getting from nine to two systems. The ILA planning was more focused on the long-term and the future of the actual services. Just so you know, the systems are currently charged according to the law, anyways, with advocacy for libraries in Illinois. That was something that they had long worked with ILA on, but that was a role that really disappeared during this time, obviously.

DELIVERY STUDY

A further outgrowth of this work by ILA was a delivery study that was funded in 2010 (it was actually done in 2011 and 2012). This was a \$100,000 grant from the State Library to really look at delivery in Illinois and how it could be done better. Most of delivery, as Amanda said, is a critical service. It was in jeopardy at certain times. Most of delivery in Illinois is done in-house. It's done by assistant staff. It's not outsourced to commercial couriers.

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And so, ILA hired Lori Bowen Ayre to look at best practices for delivery. She developed a very robust report (which you can find on the ILA website, which is www.ila.org). There actually is a section of their website that is devoted to the future of Illinois Library Cooperation, or SILC, which is the short name for that.

As I said, this was happening simultaneously with a legal compliance focus of the transition boards. As of July 1, 2011, it was one of the two current systems. (There's actually three systems, because the Chicago Public Library is its own system). The RAILS and Heartland systems were born on July 1, 2011 with their own boards. We've been launching them, even up until now.

As I said, they're both still governed by boards. The boards are elected, and they are a mixture of the multitype systems. The board members come from a variety of libraries. As well, we have librarians and trustees. I think a majority of the upward members are trustees. So, the governance model has not really changed in the downsizing of systems.

LLSAPs

AMANDA: One of the exciting things to come out of the merger is in all the systems, [a historic change] was the creation of the Local Library System Automation Programs. We love our acronyms and should be able to say them out loud. We call them "LLSAPs." These are just organized library systems. Shared catalog, share consortia.

One of the really exciting things to happen for the southern systems, the Illinois Heartland Library Systems, is that the four of them decided to merge all of their catalogs. We are, right now, in the midst of becoming, I believe, the largest consortia in the country. If not, we are definitely Polaris's largest customer. There are over 400 libraries of all types that are participating in this shared automation project. On April 9 of this year, if everything goes according to plan, we will go live with the shared catalog.

And with that comes a lot of exciting things for our patrons and for our member libraries. It allows us an opportunity to share in a way that we haven't been able to share before. We've always, especially in the Southern systems, had the need to share our resources. We are geographically spread out with population centers randomly and haphazardly spaced around the area.

Unfortunately, the legacy library systems weren't necessarily arranged in a geographic way that made sense. My particular library is located in a small town called Effingham. It has 12,000 residents. Our location is right where Interstate 57 and Interstate 70 intersect. So, we are a major transportation hub for all types of industries, but our location within our legacy system put us on the outskirts. So, we actually weren't able to share with the libraries that were closest to us, because they weren't using the same catalog as us. They weren't using the same delivery system as us, because they were in a different system altogether.

This is something really exciting for us (and for libraries in a similar geographic situation as us) that things are starting to make a little bit more sense. I can get books from the library in the same county starting in April, and they'll be delivered to me more quickly than before, because it

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will be within the same system. It will be the same catalog. It's going to be a lot more seamless for our patrons. That is one really exciting thing that has happened as a result of the merger, is that the resource sharing has become so strong, and such a central component of what we need to see happen, for the southern libraries, in particular. Dee had a different experience with the LLSAPs in the north.

DEE: Yes, indeed. As I alluded to earlier, there is a very strong tradition of resource sharing in Illinois. There is [also] a strong tradition of autonomy and libraries wanting to be financially in control of their own destiny, in some cases. We have had some good things and bad things happen with our LLSAPs (as they are, I think, very unfortunately named).

First of all, the LLSAP is the official [sanctioned] state library automation system. We have other consortia, that are so-called private consortia, that were started not under the auspices (and Amanda, you might know better about this). As I understand it, some of these consortia [were] started not by the system but by individual libraries just joining together. They have not been eligible for state funds or system funds as the official LLSAPs have been.

And in the case of CCS (which is a consortium but not an LLSAP [and] used to be part of the North Suburban Library System) that went independent many years ago. They provide the same services as an LLSAP. They do not get any state or system financial support for doing that. Obviously, that's a good thing and a bad thing. You're much more independent, but I personally think that we have to bring some rationality to this—what is an LLSAP and what isn't an LLSAP—and start going forward.

We also had a couple of places where the Prairie Area Library System served the Joliet area out all the way to Iowa. Their LLSAP was called PrairieCat. [It] included large libraries such as Joliet and also included libraries that were actually in Iowa. When these mergers took place, some of the members [of that LLSAP] broke off and formed two other private consortia that are not LLSAPs. [They went] in the exact opposite direction from what Heartland is doing. We now have Pinnacle, which is, I think, six relatively large libraries in the Joliet area. I think it's called RiverShare, [and it's where] the Iowa libraries have formed their own independent consortium.

On the other hand, I think there were so many separate, independent systems before 2010, it was very easy for the existing LLSAPs to just proceed forward on their own course. I know, from being involved in SWAN, that there really wasn't much opportunity or incentive for the LLSAP managers. They weren't against working together or talking together; but there was no incentive to do it, either. I have to say that this has been a real benefit of the merger, which is that there are now regular meetings.

There's an LLSAP Task Force of the board looking at what the priorities are. [They are looking at what these LLSAPs should be doing to serve members. [They are trying] to bring some coherence and standardization to the services they provide; for instance, how the fees are assessed, and to, at least, try to resolve this question of what makes one an LLSAP and not another. To [not] look at a merger, but an overlaid project or product that could bring the varied, shared catalogs together with the idea of providing a seamless experience for the end user, as well as the ability to directly request items that are not in the user's catalog.

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To add to it all, we have a number of large standalone libraries. For example, Naperville is a good example. It is a strong believer in resource sharing, but not a member of any consortium and other libraries similar to that. So, it's really very complicated to get all these people and organizations to work together and to plan together. But as I said, I do see a definite benefit here in the merger, in that it has forced people to talk more with each other, and they have seen the benefit in our embracing it eagerly as a plan.

OTHER TECHNOLOGY-RELATED SERVICES

Stef asked us to talk about the services that are being provided now, and other technology-related services. So many of them have been eliminated. When you don't know literally where or when your next dollar is coming from, it's pretty hard to innovate. From my perspective, [there is a] gap between the libraries that are financially sound [and those that are not]. The systems really provided mere support for core services. Without the system services, that has been, I think, a real loss. That gap has increased with the continuing education, training and consulting. Here in RAILS (and I'm sure it's true in Heartland) smaller libraries really miss the consulting services.

AMANDA: That is definitely true. The lack of consulting services has certainly forced the issue about library service and how you provide that. One of the nice outcroppings of this (with the shaking off of the boundaries) is that the libraries in my area are talking to each other more. I think Dee expressed that, too, with regards to LLSAP. There's a lot more communication amongst the individual libraries, which can lead to some really fabulous things. I mean, it can also lead to financial miscommunication, when the system or the State Library isn't able to get the message out clearly and effectively in every situation.

But, it has really encouraged the libraries to communicate together, to group together, at least informally. And as Dee was talking about with the northern systems, some of them have decided to group together in a formal way with private consortiums. In my system, it's more of an informal arrangement—trying to share those services [and] share those experiences with each other. Share continuing educational opportunities. Bringing in our own speakers and sharing that cost amongst interested libraries.

Just from a library development standpoint, that's been exciting, too, knowing that we can do it; and if the systems can take some of the bigger things like delivery and resource sharing, then we can work together to provide the other items. The systems don't have to do it all.

DEE: A bit more about continuing education. Specifically, as Amanda said, some of the libraries have banded together. Some of the south suburban suburbs of Chicago have formed a mini CE network called ATLAS. They are working together to bring in speakers or to find expertise in-house. Everybody is welcome to attend these seminars. Also, in RAILS, the Dominican University Library School has really stepped up to provide some of the training that we've lost for both technology innovation, trustee orientation, and things like that. But there's a cost for that. Obviously there was a cost for the system training as well, but it was partly embedded in their funding. It's available, but it's not as available as it could be and was.

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CURRENT SYSTEM SERVICES

At this point, because of the funding uncertainties, we're very prescribed by the statewide regs, and the Secretary of State, who is the official state librarian, for what system-wide funds can be used for. Specifically the funds can be used for support for the LLSAPs and delivery. That merger grouped together as resource sharing, obviously. We can do some continuing education, training, and other kinds of services to members that are related to resource sharing. But really, there's a very tight hold kept on how we spend our money.

Another priority is the Talking Book Services for the visually impaired. We are currently transitioning those services, as well. In RAILS, we had a service center in Geneva, Illinois and one in East Peoria. We will be merging those and providing only advisory outreach support—the reference reader's advisory service out of RAILS, [along with] the actual circulation of all materials. The materials, themselves, are being moved to the State Library in Springfield. We will be providing the Talking Book Services to all of the counties in Illinois except the Chicago Public Library, which also provides a portion of this kind of service to their residents.

Obviously, this merger and this transition involves potentially more staff layoffs—possibly people not being able to continue their employment, because their job is being transferred 200 miles away. That is yet another difficult thing for staff. But it makes sense. It's a good business decision in terms of how the service was being used, and the amount of dollars that were being spent on it.

Then, obviously administration and support of these services is something that is a part of our budget as a planned service. The state fiscal situation is still uncertain, and we have [concern] about potential changes to the pension systems. To potential cuts. I guess there was a very small cut in the overall state library budget in FY 2013, but it is a struggle every year. I have heard that the General Assembly of our state Legislature did consider some greater cuts. The advocacy by member libraries really did make a difference in their decision. That's something for all of us to keep in mind [and] to take seriously. Do you want to say anything else about the services in Heartland, Amanda? I think it's pretty much the same.

AMANDA: It is. Dee, correct me if I'm wrong, because your experience is a little bit more close to this. The Talking Book and Braille service that is located in Carterville, which is near the Carbondale area of Illinois (so very far south) will still provide circulation services. Is that correct?

DEE: I think so, yes.

AMANDA: So the Talking Book and Braille service that receives that grant to support that sub-machine lending location will still carry on down there. Other than that, everything is pretty much identical.

DEE: The other thing that we're very much engaged in, right now, is facilities planning. We have seven buildings. It's actually sad to be in some of them, because they are so empty. They really have delivery staff, for the most part, and some LLSAP staff in some of them. We

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have almost contracts (I'm crossing my fingers) with two of the buildings, and have others on the market. So, we're moving forward with that, but that's a big part of our work right now, is dealing with the facilities and then obviously with the staff. The issues that, that raises with staff in terms of such things as telecommuting [is] very difficult, as you can imagine. We're making progress, but it's certainly not a good climate for selling commercial buildings.

AMANDA: And the same is true with the Heartland Library Systems. They have four facilities. One was already full prior to 2010, and it is currently being leased back to the library system, because these system buildings are delivery hubs, and where a lot of that in-house delivery sorting [is done]. So having a facility of some sort was a necessity. Last night, the IHLS board met. Fortunately, they go [late] into the evening. Facilities was once again on the agenda, and I think that there were some actual recommendations for which facilities to shutter and put on the market, and which [single] facility will remain as the only physical presence for the library system in that area.

SOME GOOD NEWS

DEE: There is some good news, though. We do think that we're going to be able to purchase some e-content. The State Library has proposed this project to both systems, and actually to CPL (Chicago Public), as well, as a method for resource sharing. We're currently looking into different vendors [and] different scenarios for doing that. There's even some hope that we might be able to extend this beyond system member libraries to address the never-solved, longstanding issue of people who don't have access to public library services. As Amanda said at the very beginning, that was a goal of the system, but we never accomplished it, and it's possible that maybe in this digital age, we might be able to actually provide universal service. That's certainly good news.

There is some training being brought back. The Small Public Library Management Institute (SPLMI) which had been around for years and was discontinued, [is] coming back this year. We're talking about doing some different pilot projects in delivery in both RAILS and Heartland to see how we might do it better with some efficiencies, as well as some improvements to member libraries. [This] hopefully will result in some savings that we could then use on something else. As I said before, the LLSAPs are engaged in discussing some joint projects, including a discovery overlay module model.

FUNDING

Funding continues to be very unpredictable. We have received a payment this fiscal year (one payment). The State Library has been very effective and resourceful in using LSTA funds to keep us going. [With] the payment of state funds, there's such a huge backlog of bills that have been authorized and are in the comptroller's office, but the payments have just not been made. That's one of the reasons why the services are so strict in terms of what we can do, because we're trying to be sure that we keep the core services stable for the member libraries. The core services, obviously, are delivery, Talking Book and Braille service, and the LLSAPs.

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The advocacy role that the systems had; IRA has taken this on. Amanda is on the board, so she can speak very specifically about this as well.

AMANDA: As Dee mentioned, ILA has always played a role, working in partnership to advocate on behalf of the library systems and all libraries. As the systems' focus understandably had to shift towards working through the logistics of bringing together nine systems into two, the Illinois Library Association really stepped up their advocacy role and awareness.

I know I personally was shocked when I was sitting on the board, and we received the news that library systems did not get a cut this past fiscal year. It did not help payments come any quicker. The funding precariousness is still there. To know that the advocacy efforts of all the libraries, of all the members, of our lobbyists, of the association, of the systems, and the State Library's role that they can play in that—it really was shocking when everyone else, across the board, was getting massive, massive cuts. So, that's been great to see.

DEE: I agree completely. It was very surprising, in a good way, though, for a change.

AMANDA: Yes, exactly. On the board, we had all braced ourselves for, *What's it's going to be this time?* And to know that it was a zero cut, and everything was holding stable—that all the major grant programs: the public per capita, the system funding, and the school per capita were held was an amazing feat.

LEGAL ISSUES

DEE: But don't underestimate atrophy. I think sometimes you don't see what ends up having an effect; but that doesn't mean it isn't having an effect. So, keep it up.

In terms of legal issues, the actual laws and rules have not been changed. We [were] very careful, as I said, when we were doing the compliance during the mergers to really go by the existing language. On the one hand, [that made it easier to move forward], but on the other hand, we're going to have to do something because we're definitely stuck now. It's getting harder to move forward.

We really have to change this language because we can get [so] far, but we can't [get] much farther. So, the State Library is putting together a team to look at the Interlibrary Loan Code, and I guess there is some possible discussions of funding formulas. The State Library is pushing very strongly for standardization of things like delivery practices [and] labels. Again, there's this sort of dichotomy between resource sharing autonomy so that the LLSAPs [and] the systems did develop, and for a lot of good reasons. The libraries right around Chicago [have] very different needs than the libraries down more towards Heartland or out towards Iowa. Obviously, it's important to have services that members are going to use; but there also does need to be some consistency in how the services are provided, and so they're pushing on that. We'll see how that plays out this year.

HOW COULD REORGANIZATION HAVE GONE BETTER?

This is an interesting question. From my perspective, in terms of how the organization could have gone better—it's easy for me to say. I was not going through it. I was an observer. It certainly seemed to me that there were many years where there was not a lot of collaborative planning being done, and that, as you guys are now doing in Wisconsin; that, that could have made things better for everyone. It might have been possible to take some charge of the process instead of really becoming a victim to it; but it's much easier to say that as an outsider than as somebody who is delivering service on a regular basis. This is [just] my opinion.

AMANDA: And I would say that, that is true. I [started] working with all nine of the systems in 2005 or 2006. While collaboration and cooperation were really what we talked about in every single meeting, it was hard to make any headway. A lot of it probably [was] because of ego—and ego not necessarily in a bad way. Each of the systems and their leaders took a lot of pride in what they had accomplished and what they could accomplish in [their own areas].

And each of the individual nine all had the same types of members. We all had academic, public school and special in varying mixes and combinations. We all provided the same basic services. Generally speaking, we provided them all in basically a similar way. But each group took a lot of pride in developing those libraries as a unit, so I think it was hard to be able to step back and say [that] these libraries are geographically closer to each other—never mind that they're in three different library systems.

They really should be working together. We should be able to find some overlays, some efficiencies here to provide these services. Why is this member library being asked to wait so long for their delivery when this other library system's delivery van goes right by? How can we do that? The pride that was placed in each individual library system prevented some of that more innovative thinking from actually being put into action.

WARNING SIGNS

DEE: I would say that the warning signs were certainly there. We didn't get political support for systems, and that would be most clearly evidenced in terms of funding; even level funding, let alone additional funding. There were ongoing funding decreases. And as Amanda has talked about, maybe competition isn't the right word, but I did perceive that there was some competition. And sometimes that is for a good reason. You want to be the best. You want to do it better for your members. It doesn't always result in the best long-term solution or result.

Again, fundamentally it all comes down to being open to change and thinking about how to move forward into the future, how to stay relevant. It's something librarians do constantly in their libraries, and systems are not immune to that. No organization is. That's it for us. What else can we tell you about Illinois?

STEF: Thank you Dee and Amanda. While you guys have been talking, the questions have been rolling in. So, if you're ready, we could start answering some questions.

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AMANDA: Absolutely.

STEF: We have a clarification from quite early on, and I apologize. It was a question about something Dee said related to the structure of Illinois. *Did you say that there's more than 2,000 cities, villages, and townships, and that they each have their own autonomy and dictate the library budget?* Was that correct?

DEE: No, sorry. What I meant was that we have individual governing boards and tax-levying authorities for park districts, townships, libraries, school districts, villages, cities, and library districts. There are all these separate entities. For example, in Oak Park, we have the Oak Park Township. They set their budget. We have the Oak Park, Park District. They set their budget. We have two school districts. We have the library, plus we have the village. And this is just the culture of Illinois, that everybody is independent. It's not just libraries.

AMANDA: Yes. Illinois has the highest number of units of local government—even higher than California and New York.

STEF: That's very interesting. We don't have library districts here, but we have other types of districts. I think people will be able to make that parallel.

AMANDA: We even have water distribution districts. That's the level of insanity of local governance. We're talking about in Illinois.

DEE: And there's the ever-popular mosquito abatement district here, as well.

AMANDA: Yes. I forgot about that one.

STEF: Okay. That is strikingly answering the question. A mosquito abatement district. The next question was about Chicago and Cook County. *I think I understood that they are their own system.* Is that correct?

DEE: The Chicago Public Library is its own system. The libraries in Chicago that are not branches of the Chicago Public Library are served by RAILS. In other words, a special library, an academic library, etc., are [all] served by RAILS.

STEF: So Chicago Public Library is its own little universe.

DEE: Yes. And you'd be surprised to hear that, that was a political decision.

STEF: So, how does Chicago Public Library collaborate with RAILS or with other systems? Is there much collaboration at all, or are they just completely separate?

DEE: Well....

STEF: Is that a loaded question? I'm sorry.

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DEE: I don't know if you know the name Mary Dempsey. She was the Commissioner of the Chicago Public Library for a long time. She built a lot of buildings. Had a great relationship with Mayor Daley. With ILA, we were looking to do advocacy. For example, when ILA got a \$100,000 grant to do the delivery study, Mary Dempsey was in the room with us with Secretary White of the State Library staff. Certainly, we collaborated in an advocacy way.

But I would say [just] generally speaking, we have a lot of differences in terms of what we're doing for our customers. Now, they also are doing an e-book project at the behest of the State Library, and the model that they're looking at is patron-driven acquisition. Just last week, I had a conversation with some of their acquisition staff. The whole point is that we do move forward more collaboratively. It's always a struggle. I worked at the Boston Public Library. It's the Boston Public Library and then everybody else in the state. And in Illinois, it's Chicago and everybody else in the state.

STEF: So there's always that tension between the biggest...

DEE: Yes. And they each have their own line items in the State Library budget. This is their per capita grant that they get.

AMANDA: Actually, it's one of several per capita grants that they get.

DEE: Right.

STEF: Is a library membership in the system, at this point, voluntary? Or are all the libraries in systems?

AMANDA: That's a tricky question. There are membership criteria that have to be met. Right now, the State Library is working on a project to strongly enforce that criteria. Again, this all goes back to compliance and the distribution of the grant. They want to make sure they have a strong record of who actually qualifies to be a system member, and [whether] the system [should] get money for that library. But the libraries can always opt not to be a member, even if they are compliant. They miss out on a lot of stuff. They can't apply for the State Library's grants. If they're a public library, they can't apply for the public per capita grant. And they miss out on some other opportunities.

STEF: Does the system not get funded for them, if they opt out?

AMANDA: They do not. Well, I think Dee can speak better to that.

DEE: I think that's true, but I'm not sure. I think that's correct. I also know that we have, I'm sure, department developmental libraries. Those libraries have to have a five-year plan to become full members among other things they have to do. They can be suspended. In fact, unfortunately we regularly suspend libraries from system membership because they're not meeting the criteria. Now, they're not difficult criteria. In a lot of cases, it's special libraries or school libraries.

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AMANDA: But there have been public libraries, too, in the past, unfortunately.

DEE: Unfortunately. Right.

STEF: Can I just clarify something? The determination of compliance of system membership is coming from the state, and the enforcement is coming from the state? Or are you doing that compliance check and enforcement at the system [level]?

DEE: The system does the compliance checking.

STEF: How many staff members are employed by each system at this point? What are their position titles? For example, automation, continuing education, delivery? What do you have and what are they doing?

DEE: In RAILS, we have about 120 people at our facilities. The Burr Ridge facility (where I am speaking to you from) has been designated as the administrative headquarters, at least for now. Most of the staff are delivery staff. It's drivers and sorters at the various facilities. We also have some LLSAP staff at some of the facilities, [but] not all of them.

And, of course, at Burr Ridge we have financial staff. We have a director of communications. We have human resources. We do not have anybody on staff who has the title of continuing education consultant or anything like that. We have delivery service managers, and we're about to hire, I hope, a services and resource sharing director who will be in charge of member outreach, development, and those kinds of things. So, it's very bare bones.

AMANDA: It's the same for Heartland. As far as staff that are employed by the library system grant, I would say it's less than 100. I'm not as intimately familiar with the staffing levels as I used to be; but again, it's mostly delivery staff. I would say that makes just a rough guess. Don't quote me on it. I would say that would make about 60 to 75 percent of the people that are paid out of the system grant, and the rest would be administrative.

Now, Heartland does have the LLSAP, and there are additional fees associated with participating in the LLSAP project. Heartland Library System is able to hire more people that are paid through those member fees. Illinois Heartland Library System in Everett has over 600 libraries of all types. The LLSAP consortium has just over 400. About 200 libraries opt not to pay those additional fees and just get basic library system services, such as delivery. There are more staff that are paid through that method. There are a couple of staff members—I don't know if their official title is trainer, but they are able to provide continuing education related to resource sharing.

DEE: Just to provide a little bit more context. We have about 1,500 members in RAILS in an area of about 27,000 square miles.

AMANDA: And we've got the rest.

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STEF: That raises one of the questions that came up. *How many days per week is delivery available? Is it dependent on type?* How does that work?

AMANDA: That is one of the lovely questions that these pilot projects will get to work through, because it is different. It's different [for] every legacy system. I believe that each of the systems have some basic criteria that are applied right now. My library, in particular, gets it five days a week.

STEF: That may not be true...

AMANDA: That might not be true in the future.

DEE: That's a specific example of where standardization is a good idea. There are different thresholds in different systems. That's not the best way to run it.

STEF: Let's go back to the governance question for one second. You mentioned that there's a board for each system, and that the board is a combination of library staff and trustees. Is that correct?

DEE: Yes.

STEF: Who elects those? How are they selected?

AMANDA: The members.

STEF: So, the member libraries vote on the board.

DEE: Yes. One vote per institution.

STEF: One vote per institution. And that's an interesting thing, because one of the questions was, *How do member libraries get a voice in the services they receive?* I think obviously the boards are probably one way that they have a voice. How else do they have a voice? Are there regional meetings to talk about policies and procedures, particularly when you're talking about the ILS component? How do you get consensus? How do you get their voices with so many member libraries?

DEE: In RAILS we have a member advisory group that is elected. Some of the members are elected. I think there's eighteen in the group (don't quote me on that). Some of them are appointed. Some of them are elected. They are library staff—directors in most cases.

They meet every other month to discuss issues, to provide feedback and advice for me, the system staff and the board, and just to be a sounding board to provide input, in general. Also, we just established a board of fifteen regions in RAILS that are general geographic areas. We are in the process of identifying regional coordinators. There will be volunteers (not librarians) in each of these areas to help us to get the word out about different things about the members and to just

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in general communicate better with members. It's a real challenge over such a wide area. There's no question.

AMANDA: And in Heartland, we do have an advisory council. They do have their own bylaws. It's a little bit looser, I think, than the system that RAILS has for the members advisory group. It's more self-selected. Basically, if you want to participate, great. Come on in. I think that has a lot to do with geography, too. We've always had a wide geographic area to cover. Now, it's much more massive. Basically it's whoever is able to participate is welcome to do that.

Then from the LLSAP perspective, that's where a lot of the greater organization of members' voices comes from. Especially as we merge into a single ILS vendor, there are committees working on all the different policies and sending out communications to get support and get input on all of these different policies.

That is definitely one way that member voices are able to be heard. The State Library was able (and is still in the process) of distributing video conferencing equipment and locating that in public libraries, typically, that are served by either IHLS or RAILS, but are not at one of the legacy hubs [or] buildings. That extends the network of the video conferencing equipment that's already in place amongst the legacy system sites, too. So, that's another way for members in either of the systems to participate.

STEF: Thank you. Related to that is a question about what you guys were mentioning related to libraries forming their own consortium to do things on their own and working together to do things on their own in collaboration. *Is there a structure for that type of cooperation, or is it just a very ad hoc—as projects come up, they band together and do them?*

DEE: It's been very ad hoc, actually. Relationships exist that were formed on the basis of, as Amanda was describing, LLSAPs or [geography]. You're next to somebody or you're in the same general area and you're the same five libraries. It's pretty ad hoc.

AMANDA: It's almost always, though, in response to a specific need. Like the private consortia of RiverShare or Pinnacle shared a geographic proximity to each other (these two separate groups) but they were responding to one particular issue, which was how resource sharing was happening within the larger framework. They felt that they needed to group together.

The same way with the ATLAS group. They were responding to specific needs. There was no continuing education happening, and that was something that they were passionate about. And so the ATLAS group is geographically close, but not as tight geographically as the consortium. So, there is some spreading that happens, too, over time.

STEF: So depending on what the issue is, they may or may not be as geographically close together. Just sort of informal groups.

AMANDA: Exactly.

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STEF: A question about existing contracts. *Were there any issues with existing contracts from previous systems?*

DEE: You mean between the State Library and the systems?

STEF: I think any sort of contracts. Like, were there contracts that the public library systems had been involved with that then had to somehow change as a result of the mergers?

DEE: Yes. Intergovernmental agreements, for example, among other contracts. Yes, this was all part of the whole compliance part of the process. For example, with SWAN as an LLSAP, it has become its own intergovernmental instrumentality. That's what the systems are in Illinois. We're not 501(3)(c) organizations. We are intergovernmental instrumentalities...

STEF: Yes. That's similar to Wisconsin. Yes.

DEE: So, SWAN is its own separate one, now. And so they had to then find a new contract with RAILS, and then each member library in SWAN had to sign a new intergovernmental agreement with SWAN. So, all of that had to be worked through by the system, the merger transition board. I mean, even the merger transition board had to transfer its authority to the new board on July 1 so that people had to meet, actually, on July 1 and do this. So, yes. All of that was excruciatingly detailed.

AMANDA: And the systems are still going through it. As I mentioned, Heartland just had their board meeting last night. They're still working (and I'm sure RAILS is, too) on collapsing all of their financial accounts into one. Just this past year, they collapsed their health coverage under one benefits package. These things are ongoing and still developing, and there are still areas within each of the systems where more merging of the smaller issues (bank accounts, individual contracts, and things like that) are still coming together.

DEE: Right. We're still writing policies like we're a brand new organization, really.

AMANDA: Mm-hmm.

DEE: We're still writing policies for example, where we can deposit our money. And who are the signatories on checks. I mean, it's the thing that you took for granted, but now its place is officially on paper.

AMANDA: And those merger boards—they did have only six months to get it all together. That was everything, stem to stern: job descriptions, reorganization of the general org chart. Hiring of an executive director. Bank accounts. Financial systems. Policies. Making recommendations of policies so that on July 1, the new board had something to approve. I remember there was a huge conversation about bylaws, and how you go about that. It was just a lot.

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STEF: We have about a minute left, and I still have a few questions. Would you guys be willing to stay for a few extra minutes? These are mostly related to the ILS. I have two quick questions related to statutes, and then a set of questions about the ILS mergers.

AMANDA: I'm available for sure.

DEE: Sure.

STEF: If you have to leave, this will all be available on a recording that we'll post to the SRLAAW website very soon. Let's handle the two statute questions quickly. One of them was (and I think this has already been answered). *There were no changes—or at least so far, there have not been any changes to statutes.* Is that correct?

DEE: That's what I think. What do you think, Amanda?

AMANDA: Well, I believe that there were some just in the last couple of months—I believe a member reading something about the Joint Rules Committee approving some changes. But these are very minor things. All the big points that Dee outlined are still true.

DEE: It's rules, not statutes.

AMANDA: That's true. Yes. They're rules.

STEF: *Is there any statutory language for library system mergers? Was there anything like that in the statute when all this started that you know of?*

DEE: I don't know if it's in the statute or it's in the rules; but it's somewhere.

AMANDA: There is some provision for that.

DEE: I can look it up if you want.

STEF: That would be great, yes.

AMANDA: There is some provision. Like I said, this isn't the first time that this has happened. It's just the first time it happened on such a large scale, and under such a compressed time frame, too.

STEF: The next questions are related to the LLSAPs and ILS. *Did any of the LLSAP vendors cause any problems with the mergers? Were there any issues with them?*

DEE: I don't think so.

AMANDA: I don't think so, either. In Heartland, we were lucky, I guess. It's my understanding that all of the contracts were basically running out at around the same time, anyway. So, I think that what they did for the ones that had run out already is they just did a one-

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year extension, or something of just basic maintenance, just to keep it running until then. But three of the legacy systems that formed into this new consortium LLSAP—two of them were on the Horizon product from SIRSI Dynix, and a third was still on Dynix Classic. Those products were dead, anyways.

STEF: So for this project, how did you decide on Polaris with that group? Obviously that was a big change for the libraries.

AMANDA: Well, actually we just started with the training of that. So, this month is really the members' first opportunity to really get their hands dirty with it. But as far as the process that was used, the Heartland Library System sent out an RSP to the vendors to provide this service. Ultimately, they whittled the list down to two finalists that were able to meet all of the different criteria that they had established. One was Polaris, and the other was SIRSI Dynix, their Symphony product.

Then during the month of November 2011, they had both of those vendors come onsite (luckily enough in my town) and they did massive demonstrations of each of the products. Each vendor got two days to showcase their product. And those sessions were sent out live over the web for those that couldn't come in person. And the attendance was just through the roof. From there, members were asked their opinion on a variety of different criteria and which they preferred. And then ultimately, Polaris was selected on members' response and, of course, price played a role, as well.

STEF: Sure. That leads right into the next question, which was, *How was this funded? That combination?*

AMANDA: Through the system per capita grant, because resource sharing and specifically the Local Library System Automation Project is still listed as one of the funding components, one of the things that the money can be spent on. Some of this was funded by system dollars, but the bulk of it is actually financed by member fees. Each of the legacy systems had various reserves that were set aside. I'm not quite sure of all the machinations that happened as far as combining those different reserves and different funding formulas. That could be its own webinar by someone smarter than me. Talk about that.

STEF: A new question just came in, and let me ask this other one about discovery overlay. *Are you looking at any discovery overlay products? Are they showing any promise for any implementation in your state?*

DEE: Yes. That's something that the LLSAP Task Force (which is a group that was appointed by the RAILS board last year to facilitate LLSAP joint planning and discussions) [has as] one of the priorities of this task force. We just had a meeting about this in December or maybe late November. We haven't done any actual investigation, but it definitely came out as the highest priority for the task force in terms of how we could improve service to members and to the end user.

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So, in terms of the products themselves, I know they're out there. When I was in Massachusetts ten years ago, we had what we called a virtual catalog that did allow for direct borrowing by patrons. If you couldn't find an item in your catalog, you were prompted to search in other catalogs. I forget what the name of the product was. It wasn't great, but it worked, and I'm sure they're better now.

STEF: We'll keep an eye on your progress on that one. The next question was, *What is the current level of system per capita grants?*

DEE: I think I can find that. I know there's a statutory level in the funding that we get.

STEF: Yes. We have the same thing in Wisconsin.

DEE: I can look that up in my e-mails, because I asked that very question not long ago.

AMANDA: I can tell you what the statutory level is. It's a combination of the area and the per capita. The per capita is \$1.25 of the area served, and it's an additional nineteen cents per capita for libraries under 500,000. That would be everyone but Chicago. And then the Level 4 land area is, of course, not accessible in the statute, because this is Illinois. But there is also a dollar amount associated with the square mileage, as well.

DEE: I can certainly look it up. I don't have it. I can e-mail you, Stef.

STEF: That sounds great. We'll make sure that we get that out to everybody. I think that the questions have stopped coming in. Thank you, guys, so much for your presentation and sharing your information and your experience with us. Thanks for being willing to stay a few extra minutes to get all the questions answered. This was great.

AMANDA: No problem. Thanks for having us.

DEE: Yes. Thank you.

[End]