



Last Updated: 9 December 2019

Subject: RSA Training Policy Update – Fall 2019

Training RSA member library staff involves a huge investment of time and effort by RSA staff. The need for member training has grown exponentially over the past several years as the RSA membership has grown, and frequent library staff turnover has become the norm. One of the major goals of the RSA Strategic Plan is to reinvigorate the member-to-member mentoring program for which RSA was famous when it first formed in the 1990s. Mentoring will relieve the amount of RSA staff time spent on training, reduce the number of training requests received by RSA, and strengthen cohesion among RSA member libraries. As part of our efforts to use RSA and Member Library staff time as efficiently as possible, RSA has adjusted our training policy to that documented here.

Please direct any questions or concerns about this policy to the RSA Help Desk at rsahelp@railslibraries.info or 1-866-940-4083.

RSA general training guidelines:

RSA expects libraries to train their staff internally whenever they have other staff members who know about the RSA database module, task, or procedure in question. RSA is not the first line of support for staff training. Internal training and mentoring should be the starting point for all training. Please consider these general guidelines:

- Training conducted by RSA staff is intended for library staff members, not Board members, volunteers, interns, or other non-paid individuals who may be assisting a library.
- Library staff are responsible for training new staff members unless no other staff member in the library knows how to do the tasks. RSA trains 'the trainer', not each individual library staff member.
- Library staff are responsible for ensuring all Board members, volunteers, and other non-paid individuals working in their library are following RSA procedures.
- Non-library staff members may be present during training at group events, such as library in-service programs where RSA staff have been invited to provide training. Group training for non-library staff members applies to circulation functions only. Cataloging training is limited to library staff to ensure cataloging standards are maintained. Reports training is for library staff only and requires their signatures on Personally Identifiable Information (PII) non-disclosure agreements to access patron data.
- New RSA members or members upgrading from Union Listing membership are permitted to invite Board members, volunteers, or other non-library staff to the ***initial*** cataloging training. Database maintenance visits and subsequent RSA cataloging training is intended for library staff only. Once the new or upgrading

library has begun circulating, any subsequent cataloging training follows the standard RSA policy.

- New RSA members or members upgrading from Union Listing membership are permitted to invite Board members, volunteers, or other non-library staff to the ***initial*** circulation training in preparation for “go live” in the RSA database. Once the new or upgrading library has begun circulating, any subsequent circulation or holds training follows the standard RSA policy.

Below are current training guidelines by department:

Member Services Training:

- WorkFlows circulation and holds workshops are taught at member libraries where at least three staff from three different libraries attend. At least one workshop will be scheduled in the East Peoria area each spring and fall.
- WorkFlows circulation and holds training are often possible onsite for single libraries. Contact the RSA Help Desk for more information.
- WorkFlows notice reports training (i.e., overdues, bills, and courtesy notices) may be conducted for a single library over the phone, via remote screen sharing, or during an RSA site visit. RSA will not visit a library solely for the purpose of providing training on WorkFlows notice reports. Contact the RSA Help Desk for more information.

Reports Training:

- BLUEcloud Analytics (BCA) workshops are taught at member libraries where at least three staff from three different libraries attend. BCA training is occasionally scheduled in the East Peoria area. It is not offered onsite for single libraries.
- By the end of 2019, existing BCA users will be assigned to the basic, non-PII access level. Future training for basic reports will be provided via recorded videos on the RSA YouTube channel. Please watch the RSA listserv for more information.
- Future BCA users with access to advanced reports containing PII will be required to attend BCA training in-person. Advanced BCA users will be required to sign a non-disclosure agreement that outlines their PII responsibilities and the library’s responsibility to inform RSA of staff who depart the library. Contact the RSA Help Desk for more information.

Cataloging Training:

Because cataloging training is incredibly time-intensive for both RSA and member library staff, it will only be offered in cases where there is truly a need.

Before cataloging training, up to two full days of RSA Staff time are necessary to prepare reports, finalize documentation, create attendee binders, and do other preparatory tasks. The cataloging training itself takes between four and five hours to

complete in-person, which excludes any travel time to and from the training location. After the training, at least one full day is necessary to follow up on workshop attendees' questions and create attendee-specific database maintenance reports.

RSA plans to create a Cataloging Trainer position in FY21 that will enable us to better respond to member libraries' training requests.

Basic WorkFlows cataloging:

- Basic WorkFlows cataloging workshops are taught at member libraries where at least three staff from three different libraries attend. At least one workshop will be scheduled in the East Peoria area each spring and fall.
- Basic WorkFlows cataloging training is provided onsite for new RSA member libraries or those libraries upgrading from Union Listing membership.
- Basic WorkFlows cataloging training may be provided onsite for libraries that are not new or upgrading. In order to qualify for this training, the library must meet two criteria: (1) no existing staff at that library who have already completed basic cataloging training, and (2) the new staff are unable to travel to one of the regularly scheduled basic WorkFlows cataloging workshops. Contact the RSA Help Desk for more information.

Brief records:

- Brief record training is provided on an as-needed basis for individual libraries that demonstrate a routine, frequent need for at least one of the approved uses listed on page 5 of the [Core Competencies for Cataloging Staff at RSA Member Libraries](#).
- Brief record training is provided via remote screen sharing for individual libraries but only if there is no existing staff at that library who have already completed brief record training. Contact the RSA Help Desk for more information.

Item group editor:

- Item group editor training is provided on an as-needed basis for Full Online RSA libraries that demonstrate a routine, frequent need for batch editing hundreds or thousands of catalog codes in their collections.
- Item group editor training is provided onsite at individual Full Online libraries but only if there is no existing staff at that library who have already completed item group editor training. Contact the RSA Help Desk for more information.

OCLC Connexion Client:

- OCLC Connexion Client training is not being offered until the restructured RSA membership levels are implemented, anticipated for late in calendar year 2020 or sometime in calendar year 2021.
- Libraries unable to find matching bibliographic records in WorkFlows and are not already trained on OCLC Connexion should submit [RSA cataloging requests](#). Contact the RSA Help Desk if there are questions about cataloging requests.