

## Operations Team Notes for UG

### Documentation Index

Starting in December, Antony started working on an audit of all the documentation created by RSA staff. An internal archive was developed from the documents found and these were then indexed. A pdf has been created which contains a hierarchical list of these documents with each one organized by type, linked, and the last date updated noted. Links are also included to the various landing pages within the support site. The support site has been edited and reorganized to be consistent with the document index. Tony, Erica, Patty, and Sara all provided assistance in completing this project. An early version was posted to the support site on February 27<sup>th</sup>, with a more complete version posted on April 24<sup>th</sup>.

The documentation index can be found here:

<https://support.librariesofrsa.org/project/documentation-index/>. The most current version dates from May 1<sup>st</sup>.

It contains links to 285 support documents:

- 21 policies
- 5 standards
- 29 procedures
- 87 guides
- 80 cheat sheets
- 42 videos (now linked directly from the support site as well)
- 21 parameter documents

8 documents have been updated and 7 new ones created from the beginning of April onwards.

### Operations Manual

The Operations Manual Working Group had their fourth meeting on April 29<sup>th</sup>. The objective of the group is to develop a manual which can be used by front end staff at RSA member libraries as jumping off point to learn about RSA and how to use WorkFlows as an everyday user. It will also contain links to other documents which will provide more in-depth information. The plan is to have a first version of the Operations Manual ready for publication on the support site shortly after July 1<sup>st</sup>. The working group will continue to develop the Operations Manual after that date as we hope to get feedback and suggestions from the membership once the manual is made available.

The Operations Manual Working group consists of:

- Hillary Dillon, Circulation Supervisor, Galesburg, [Hillary.Dillon@galesburglibrary.org](mailto:Hillary.Dillon@galesburglibrary.org)
- Nick Hulva, Circulation Manager, Fondulac District Library, [nick@fondulaclibrary.org](mailto:nick@fondulaclibrary.org)
- Laura Keyes, Director, Dunlap Public Library District, [director@dunlaplibrary.org](mailto:director@dunlaplibrary.org)
- Ronnie Parrone, CTS Manager, Washington District Library, [rparrone@washingtondl.org](mailto:rparrone@washingtondl.org)
- Lorie Priebe, Director, Danvers Township, [danversdirector@gmail.com](mailto:danversdirector@gmail.com)
- Barb Tarbuck, Director, H.A. Peine, [hn.hapeine.rsa@gmail.com](mailto:hn.hapeine.rsa@gmail.com)

- [Victoria Volckmann, Assistant Director, Pekin Public Library, volckmann@pekinpubliclibrary.org](mailto:volckmann@pekinpubliclibrary.org)
- Greg Weydert, Director, Creve Coeur, [crevec.pld.rsa@gmail.com](mailto:crevec.pld.rsa@gmail.com)

I am very grateful to them for providing really wonderful help.

## Parameters Party Plus

Starting in July, the Operations Team will start a project we're calling Parameters Party Plus. Between July 5<sup>th</sup> and Thanksgiving, it is our plan to have a virtual interview with a staff member at every public library in RSA. The purpose of these appointments will be to check that we have the most up to date information about your library and its operations. This will be used to ensure that WorkFlows is set up to operate in a manner that matches your library's internal policies. We will also be checking that we have current phone numbers, email addresses, details of your SIP2 connections among other data. We're also hoping that this process will encourage member library staff to reach out to us when a library makes an internal change. We have recently helped 16 libraries who had gone fine free update their WorkFlows parameters so that they no longer must forgive fines manually or do fine free discharges.

The plan for this project is as follows:

- During May and June, the Operations team will be completing research so that it is prepared to conduct these Parameters Interviews. We will also send out a survey asking each public library to designate a Point of Contact for the interview. While it is possible that multiple library staff can attend the interviews as appropriate, we would like a designated Point of Contact with whom we can be in contact throughout the whole process.
- Towards the end of June, we will email the first group of libraries and invite them to make bookings with members of the team. We intend to use Microsoft Bookings for this. A link will be emailed to each library in the group. The first group will be the 20 public libraries in the Eastern region. These interviews will take place starting after July 4<sup>th</sup>, and we hope to wrap them up by the end of July.
- We will then invite libraries in the Southern region to make bookings in August, Western in September, Northern in October, and Central in November.

After each interview is completed, the data collected will be used to update our internal Membership database, and James will then reach out to go over possible changes to the circulation map, holds map, drop-downs, and other WorkFlows parameters. This is a massive undertaking and an ambitious timeframe within which to complete it. We will really appreciate help from all of RSA's members to help us with this. The results will be worth it as we will be able to ensure that WorkFlows works correctly for you, and that we have the best data available about each of our members.

We hope to complete a similar project with our non-public libraries early in 2025.