

Executive Director Report – 2 September 2024

Membership Updates

St Mark Catholic School confirmed they are not signing the IGA to remain in RSA. We did not include them in the RSA membership count as of 1 July, but we also did not have them as officially out either. We placed them in a frozen state until we could get confirmation of their intent to remain or depart RSA.

We are tracking a list of potential school losses at the end of FY25. We will update this list as we learn more about each member's status.

- ROWVA CUSD signed the IGA, then emailed in mid-July to withdraw. We explained that they are part of an Intergovernmental agreement and cannot withdraw until 30 June 2025. Then offered to visit them to get them up and running for the remainder of their time in RSA.
- A-C Central
- Quincy Notre Dame
- Stark County
- East Peoria High School

We are also tracking and in touch with several potential new RSA member libraries.

- Creve Coeur Parkview Junior High School is interested in joining RSA. CC's LaSalle Elementary is covered by the Creve Coeur Public Library across the street from the school. We have a call with the Superintendent and Greg from Creve Coeur PL to discuss this on 30 September. If they choose to move forward, they will have time to apply for the fall RAILS Automation grant period.
- Hamilton Public Library intends to apply for a RAILS Automation grant this fall in order to be able to join RSA.
- Camp Point Public Library is interested in joining RSA. They are working on hiring a new Director first.
- We have several additional public libraries interested, but none have moved beyond initial contact.

Staff Updates

Staff Anniversaries catch-up!

June

- Antony Deter – 1 year

July

- Lisa Schemensky – 7 years

August

- Sara Naslund – 5 years
- Patty Kweram – 6 years
- James Campbell – 13 years

September

- Kendal Orrison – 19 years

Updated Hybrid Work Schedules

As of 3 September, RSA staff will increase their in-office work to 2 or 3 days a week. We are going to see how things go and tweak as necessary in January depending on how things go. Supervisors will be in the office four days a week now to enhance intra-team communications and work. All RSA Staff are working towards a new paradigm for our monthly all-staff meeting, typically the 3rd Wednesday of the month. Our current Zoom only monthly Standup meeting isn't intended to be super interactive.

RIP Updates: Ongoing Topics & One-Offs

This is a listing of major RSA Independence Project (RIP) to-do areas RSA Admin need to complete in FY25. The list will be redefined over the next year as we progress through the process. Updates in **Red** text.

Timeline & Punch List

- Build the overall timeline and topical punch list for the staff employment process. We are basing this on experience of PrairieCat and SWAN's independence projects as well as what we learn from outside parties and, in the future, consultants. This needs a lot of work. **Not much accomplished in August.**

IMRF (Illinois Municipal Retirement Fund)

- **Randy Stevens, IMRF Employer Services Team Leader, has worked with RSA and IMRF legal to get the process started. We sent them an overview of our budgeted income and expenses, as well as the Board Operations breakout which includes the incoming/outgoing LLSAP (Local Library System Automation Program) grant expenses. We also indicated to IMRF that we've quite happy to provide the past several years of detailed budgets or audits to them to help them in their work. This is a good first step and we're happy to have the process moving forward.**

LIMRiCC

- **We have had several email exchanges with LIMRiCC. We've been granted permission to join LIMRiCC since we are all already in the LIMRiCC pool now. Had we not been covered now, we do not think we would have been able to join. As the initial work begins, we have provided LIMRiCC a full list of RSA staff and their covered family members, what coverages each person currently has. There is also a massive package of paperwork we have not started on yet.**
- **Additionally, we learned that RAILS coverage for health care includes 2 additional vendors, one for the HSA and another working in conjunction with the high deductible (PPO or HMO) plan. We have not yet reached out to these additional vendors. At least one RSA staff member uses each of these additional coverages.**

Mission Square

- **Reached out to the RAILS representative about setting up a new account for RSA who forwarded us to the person who runs this process. They are proposing almost exactly the same program as RAILS currently offers. We also have a large package of paperwork from them which we have not had time to start on yet.**

Payroll & Other Benefits

- **Started researching potential outside consultants. Also talking to the other LLSAP's to see what/who they use.**

Staff Handbook & Policies

- Same as payroll. Makes sense to start with RAILS policies and work backwards into RSA policies. We will also need assistance here. **No updates in August.**

Staff Pay Scale

- We intend to rework the RAILS pay scale into something more appropriate to RSA's needs. The current RAILS pay scale includes 13 steps, 2 or 3 of which will be below the minimum wage in a year or two. We do not need 13 steps; we will need 6 to 7 steps with wide pay bands. Further progress will come in conjunction with other staffing and benefits processes.
- **No updates for August**

Job Descriptions

- We have begun an initial review of the existing job descriptions. We need to rewrite each of them to reflect RSA's new status and remove RAILS legacy items.
- RSA needs to plan for 3 levels of responsibilities for cataloger and operations roles, plus a supervisor role. This will allow flexibility to hire new staff with lower skill levels and experience and have the ability to promote staff internally to higher responsibilities. Right now, all existing staff are filling what would be the middle of the three levels.
- Updated job descriptions will need to be reviewed by HR experts. In addition, we may need to do a benchmarking process depending on what our outside experts advise. The current job descriptions just completed benchmarking earlier in 2024 and RSA positions were determined to be correctly placed compared to other outside entities.
- **No major work accomplished in August.**

Computers, Software, IT Infrastructure

- We need to migrate away from our Salesforce Help Desk no later than the end of November. We have done a small amount of research on replacements and ruled a couple of products out.
- We would like to set up a Microsoft Office 365 account for RSA and hope to license it in such a way that we can offer one email per library to replace the RSA Gmail accounts. This would allow us to truly manage these important accounts which we cannot do with free Gmail accounts. We will need an expert to set this up and for periodic administration tasks.
- If Office 365 is ready by June, RSA staff will move to RSA's email domain, librariesofrsa.org, on 1 July 2025 to coincide with the employment change. This would be the ideal time to make this switch.
- Zoom, telephones, laptops, printers, and everything else RSA Staff use to do their job will be moved to RSA accounts and ownership as it makes sense to do so. We can continue to utilize some RAILS IT infrastructure through June 2026.
- **No major work was accomplished in this area in August.**

Consulting & Contracts

- We continue to work with SirsiDynix to agree, in principle, to new contract terms. Our current contract ends on 28 Feb 2025. We asked for a full reexamination of our system costs, refigured them using their current pricing methods. Once that is finished, we will review and remove any contracted items we are not utilizing, then look for a final annual figure. We expect the final figure to be less than our current contract.
 - SirsiDynix is aware we intend to issue an ILS RFI to look at the state of library automation software in 2026. Depending on the findings, we might do a formal RFP process for a replacement system. However, it is still to RSA's benefit to negotiate a

new 5-to-7-year contract extension with an option to drop the contract at the end of year 2. Signing a longer contract allows us to benefit from 2024 pricing and the resultant longer timeframe and gives us additional pricing leverage. We can work a 2-year contract extension if needed, but if we do so we cannot expect a lower overall price.

- **Nothing new to report for August.**
- Consulting: Beginning to research consultants for various areas of staffing.

Conversion to III Cleanup

- We continue to work on making the name change with our vendors, on our contracts, and in all the other places it appears. Based on previous experience starting in 2010/11, this will be a multi-year odyssey.
- Converting from a Not for Profit means new contracts and levels of service and access in most of the software products we use. In almost every case that means moving from free or mostly-free services to paid services. We are generally grouped into the education level of vendor contracts and payment levels.
- **No action in August in this area.**

Administrative Updates

RAILS LLSAP Grant Application – Due 15 September

The grant process is a three-step application: 1) the grant form itself, 2) a statistical summation of the previous year's activities and membership which used to build the grant funding formula, and 3) a breakout of the previous year's financial spending which RAILS Finance does for us. Focus will 100% shift to this work after the 9 Sep DAC (Directors Advisory Committee) meeting. FYI, membership counts, and other grant statistical data are smoothed with a three-year rolling average so the membership loss this year will be slightly less painful in the grant formula mathematics.

Outreach Campaigns

The Cataloging Department Staff have begun work on their department specific 'Bug Us' materials. They will work on a release for member library cataloging staff this fall. We modified the existing campaign materials to make a school specific version that was included in the Back-to-School emails. We emailed each school branch, and all school staff that we know about, 4 emails the week of August 19th with various information. Our 'Welcome Back to School Staff' email has grown so much over the years we felt we needed to cut it up and send it out in more digestible chunks. The content of these emails was also combined into a news piece posted to the website and has been added in slightly different format as a guide to the Schools Handbook which will be built out over the next few weeks.

We have also reminded member library staff about our email groups/forums recently. In addition, we updated the group/forum listing to show both mandatory and suggested forums by position in the library. We expected this to take some time to get going and it is.

BLUEcloud Analytics (BCA) Interactive Reports

Kendal is the only person on staff who understands both BCA and the layout of Symphony data enough to make detailed reports. There is a good 1–2-year training period to bring a new person on board to do this work and it requires deep, system level, understanding of the Symphony database.

As such, we don't foresee having either the time, or a person, to train for a while. He is also the person who sets up, modifies, and deletes user accounts in the system.

Over the past couple of weeks, we have added two additional interactive dashboard reports that are accessible via a direct weblink. As of now, we have dashboards for:

- Collection Browser
- Holds Place & Filled
- Checkouts & Renewals

The Holds and Checkouts reports can also make nice graphics for member's Board packages. They can be eye-opening as well in their ability to convey just how intertwined our consortia is. Direct links for all three are posted on the Support Site, BCA page.

We plan to continue making new reports that allow directors and managers to get a better feel for what is happening in their library. We're very much open to ideas for what you'd like to see that would help you or your Board better understand your library or RSA as a whole.

FY24 RSA Annual Report

We have created an Annual Report for the membership that can be, we hope, be used as part of a return on investment document for each member next year. The RSA FY24 Annual Report is included in the Board package.

System Updates, Projects, Issues

A listing of major projects which patrons see or are affected by directly. Updates in **Red** text. Minor updates to descriptions may also have been made.

RSAcac Mobile 2

We are working with SirsiDynix to set up a testing instance of RScacac Mobile 2 (SirsiDynix's BLUEcloud Mobile 2). We are early in the process and Sirsi is still in beta on this product, with an expected fall roll-out. RSA has been asked to participate in their testing as we are one of their largest consortia. We believe this new app will allow each library to have a more personalized header and maybe more.

In August, RSA filled out several forms, set up new Apple and Google app store accounts, created an online tracking account, and filled out many forms for SirsiDynix. We are now awaiting our place in SirsiDynix's installation queue. Our complexity may require some in-depth changes to the BLUEcloud Central environment and policies which, based on experience, can take some time. These policies are created manually, usually requiring several new policies per branch in RSA.

RSAcac Header Name/Logo Updates

As part of the RScacac Mobile 2 setup, we think we will be able to set up some type of theme per library for free. That, combined with some library name changes over the years, means we will be reaching out to members to check and update their RScacac profile headers (name, logo, and color) and ensuring we match the members wishes for the look of the header. We will then match as well as we are able, the RScacac Mobile 2 'skin' for each library. **No updates for August as we are waiting to see what flexibility RScacac Mobile 2 brings.**

RSACat Online Payments

RSACat and RSACat Mobile both can allow online bill pay. RSACat is configured to do so for 24 of the old Full Online libraries who specifically asked for it. RSACat Mobile is a shared on/off setting and has been available to all members for years. We will be working through all the other Public profiles over the next couple of months to enable this. School libraries can optionally enable it in their RSACat profile. **No updates for August.**

Automatic Renewals of Materials

We have had the ability to enable automatic renewals for several years now but only Normal PL decided to roll it out. **During parameters parties, so far, we have found 13 members that are very interested in turning this feature on. RSA is working with the interested libraries to ensure their circulation rules are compatible with this.** We look for standardized checkout periods of 2 weeks with 1-2 renewals or 3 weeks with 1 renewal or shorter, to keep the overall checkout and auto renewal periods from getting out of hand. **For those libraries who need to update their circulation rules, we'll do that at the same time as the auto-renewal is enabled to reduce patron confusion.**

Website Accessibility Checkups

New project. We are awaiting RAILS guidance since they are working on this. We have also been in contact with SirsiDynix to get copies of their written conformance with the guidelines. SirsiDynix has made many updates to Enterprise, the product that RSACat runs on, to meet Federal guidelines.

Completed RSA Events: Training & Visits

Here is a listing of recent training sessions and member visits both in-person and virtual. We are also including a list in the monthly newsletter to let members know we are out making visits.

August Events

| Location | Campaign Name | Campaign Type |
|----------------------------------|------------------------------------|-----------------|
| Flanagan Public Library District | Flanagan Parameter Party | Member Services |
| Forrest PLD | FY25 Parameter Party | Member Services |
| Forman Valley Public Library | Cataloging Site Visit | Cataloging |
| Zoom | Basic Circulation Workshop | Member Services |
| Cambridge PL | AD to Cambridge PL | Member Services |
| Forman Valley | Basic Patron Registration Workshop | Member Services |
| Normal Public Library | FY25 Parameter Party | Member Services |
| Dominy Memorial Library | Cataloging Site Visit | Cataloging |
| Ayer Public Library | Site Visit | Member Services |
| Delavan CUSD | New Director Visit | Member Services |
| Rushville Public Library | FY25 Parameter Party | Member Services |
| Zoom | FY25 Parameters Party | Member Services |
| Winchester HS | FY25 New Director Visit | Member Services |
| Zoom | FY25 Parameters Party | Member Services |
| Colchester District Library | FY25 Parameter Party | Member Services |

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|---------------------------------------|-------------------------|-----------------|
| Zoom | FY25 Parameters Party | Member Services |
| Prairie Skies Public Library District | FY25 Parameter Party | Member Services |
| East Peoria Comm. HS | FY25 New Director Visit | Member Services |
| Macomb District Library | FY25 Parameter Party | Member Services |
| Washington Community HS | FY25 Parameters party | Member Services |
| Zoom | Cataloging Site Visit | Cataloging |
| Nauvoo Public Library | FY25 Parameter Party | Member Services |
| Clayton Public Library | FY25 Parameter Party | Member Services |

Cataloging Department Report – 5 September 2024

Cataloging Backlog Progress

The Cataloging Maintenance Center (CMC) continues to work on the cataloging request backlog for braille, encoding level 8, and encoding level M records, upgrading them to full bibliographic description in OCLC.

Since the August 1st RSA Board meeting, the CMC has processed:

- encoding level 8 requests = 20
- encoding level M and braille requests = 142

892 cataloging requests remain to be processed in the backlog, submitted as far back as November 2018.

The plan continues to be for the CMC to finish the RSA backlog by the end of CY2025.

Brief Record Upgrades

Since the last Board meeting on August 1st, the RSA cataloging department has upgraded 240 brief records to OCLC records with full bibliographic description. RSA is currently upgrading brief records entered into WorkFlows in April 2023.

Cataloging Site Visits

Since the August 1st Board meeting, the RSA cataloging department conducted three cataloging site visits:

- A-C Central CUSD #262 – Middle/High School (virtual)
- Dominy Memorial Library (in-person)
- Forman Valley Public Library District (in-person)

Combined, these visits reached 5 library staff for a total of 5 hours.

Cataloging Training

The August Basic WorkFlows Cataloging Workshop was cancelled because it did not meet the minimum registration requirement of at least two library staff members.

The August Bibload Workshop was taught for one library staff member and became more of a troubleshooting session than full training.

Cataloging Controlled Vocabularies Used by RSA

At the August 1st meeting, during discussion of the [Homosaurus Cataloging Policy](#), the RSA Board expressed interest in a list of all the cataloging controlled vocabularies used by RSA. Please see below and reach out to Erica at erica.laughlin@railslibraries.org with any questions.

Getty's Art & Architecture Thesaurus

<https://www.getty.edu/research/tools/vocabularies/aat/>

Examples:

655_7 Cake pans. \$2 aat

655_7 Music posters. \$2 aat

GSAFD (Guidelines on Subject Access to Individual Works of Fiction, Drama, Etc.)

This vocabulary is no longer online but available in print.

Examples:

655_7 Mystery fiction. \$2 gsafd

655_7 Adventure television programs. \$2 gsafd

Homosaurus Vocabulary Terms

<https://homosaurus.org/v3>

Examples:

650_7 LGBTQ+ victims of bullying. \$2 homoit

650_7 Non-binary parents. \$2 homoit

Library of Congress Genre/Form Terms

<https://id.loc.gov/authorities/genreForms.html>

Examples:

655_7 Science fiction. \$2 lcgft

655_7 Jigsaw puzzles. \$2 lcgft

Library of Congress Subject Headings

<https://id.loc.gov/authorities/subjects.html>

Examples:

650_0 Cats \$v Juvenile fiction.

650_0 Dinosaurs \$v Drama.

OLAC Video Game Genre Vocabulary

<https://cornerstone.lib.mnsu.edu/olac-publications/22>

Examples:

655_7 Adventure video games. \$2 olacvgtt

655_7 Educational video games. \$2 olacvgtt

Thesaurus for Graphic Materials

<https://id.loc.gov/vocabulary/graphicMaterials.html>

Examples:

655_7 Graphic novels. \$2 gmgpc

655_7 Comic books. \$2 gmgpc

UNT's Digital Library Genre Terms for Tabletop Games

<https://digital.library.unt.edu/ark:/67531/metadc826647/>

Examples:

655_7 Cooperative games. \$2 gttg

655_7 Board games. \$2 gttg

Other Cataloging Projects

- Work is underway on a cataloging version of the Please Bug Us card to encourage member engagement. The Cataloging Bug Us card will be released online in October.
- A survey for school libraries was launched on August 22nd to help RSA better understand the schools' cataloging needs. The survey has had 15 responses so far and will close on September 20th. The RSA cataloging department will be reviewing the responses and following up with the schools that have asked for our help.
- The RSA cataloging department will soon begin to work with ten libraries that are using the AV and AV-L item types. These item types were eliminated in 2014 by this [policy](#). RSA will help the libraries determine more appropriate item types to use, work with James to set up circulation and hold rules, and then batch edit the existing items to use the newly set up item types.
- After being reported by an RSA library, the RSA cataloging department has been investigating Killers of the Flower Moon and Greyhound as pirated movies. Both were purchased on Amazon, which does sell pirated movies. According to the [DVDs Release Dates web site](#), both movies never released on DVD or Blu-ray. There was also discussion of these movies as being pirated on the RAILS collection development listserv earlier this summer. RSA will be contacting libraries to remove their copies of Killers of the Flower Moon and Greyhound from WorkFlows to ensure we are complying with the [RSA Policy for Pirated Items](#).
- The RSA cataloging department has been busy with Parameter Party follow-up, setting up new cataloger accounts, removing no longer needed cataloger accounts, and helping libraries clean up codes in their home location and item type drop-down menus.
- Preparations are underway for the first offering of a four-hour, single-day session of the Basic WorkFlows Cataloging Workshop on September 17th, as well as the first RSA Cataloging Chat on September 27th.

Operations Department Report – August 2024

Parameters Parties

As of August 29, 6 Parameters Parties have been completed, and 34 more are in progress. Parties are considered complete once all the tickets raised have been closed. Several of the outstanding parties only have one ticket still open as we work through requests from libraries to turn on auto-renewals. Five more parties for the Southern region are scheduled to take place in the next couple of weeks. I plan to invite libraries in the Western region to sign up for their parties after Labor Day. 172 cases have been raised from the 40 parties held so far. 115 of these are closed at time of writing.

As mentioned last month, the interest in auto-renewals has been surprisingly high. Of the 40 libraries interviewed so far, 14 of them have expressed interest in having this feature turned on.

Parameters Parties have so far been targeted at public libraries with a plan to invite schools to participate in the spring of 2025. However, we have had 4 schools so far scheduled for parties as they would have had New Directors visits due to staff turnover.

Once all the parties are complete, hopefully late next spring, I will develop a rolling 3-year schedule for parties going forwards to avoid a similar period of drift between libraries' operations and our knowledge of those operations. Libraries needing a New Director visit will "jump the queue" in this 3-year schedule.

Documentation Index Update and Support Site

A new version of the Documentation Index was uploaded to the support site on August 28. Going forwards the plan is to upload a new version just once a month unless there is a strong reason for doing so earlier. Since it went live 9 versions have been uploaded in 7 months. The newest version indexes 313 documents with an average age of 33 months. 95 of these documents have been created or updated since January 1st, 18 of these in August alone. The index can be found here: <https://support.librariesofrsa.org/project/documentation-index/>.

We have developed an internal version of this resource to help RSA staff quickly identify the documents they need and download the latest versions ready for workshops and visits.

We are currently working through updating documents which have accompanying videos on YouTube. The documents will have a link to the video, and the video description has a link back to the document. In addition, the titles of each are being amended so that they match. The goal of this work is to reinforce members' knowledge of these resources and to support different learning styles.

Updates have been made to the ADML page at the support site. New language and ideas for resources was supplied by the Selection Committee. The updated page can be found here: <https://support.librariesofrsa.org/project/adml/>.

Schools

We're working to create documents and other information specifically for school members to demonstrate the value of RSA membership to their administration.

During the week beginning August 19th, 4 emails were sent to our school members containing lots of information relevant to the beginning of the new school year. Because we recognize that some of our schools may not be seeing our emails, we also adapted the content of these emails into a news article which displays on the front page of the support side, and a guide which will be updated at least annually. The guide can be found here: <https://support.librariesofrsa.org/wp-content/uploads/2024/08/Welcome-Back-School-Library-Staff-Guide-2024-08-23.pdf>.

Our goal during the month of September is to identify all the documentation specific to schools and to update those documents as appropriate. We want to provide a one-stop shop for our school members for the documents they need. The documentation will then be relocated to the new Schools Handbook section of the support site: <https://support.librariesofrsa.org/handbook/schools/>.

Kendal has asked that we develop a version of the Operations Manual specific to schools. Once the Schools Handbook on the support site is complete, we will be reaching out to staff at member school libraries to invite some of them to serve on a Working Group similar to the one that developed the original Operations Manual.

Bug Us campaign goodies and printed copies of the Documentation Index and Operations Manual were sent by delivery to 32 school members week beginning August 26. Copies were mailed to 3 members who do not receive delivery.