Executive Director Report for 3 October 2024

In sections with black and red text, the red text denotes new information from previous reports.

Membership Updates: Ongoing Topics & One-Offs

Withdrawing Members for FY26
- ROWVA CUSD – formally gave notice of withdrawal in July.
- East Peoria High School - formally gave notice of withdrawal in September.
- *A-C Central – (no notice given, just a hunch based on conversations)*
- *Quincy Notre Dame – (no notice given, just a hunch based on conversations)*
- *Stark County – (no notice given, just a hunch based on conversations)*

New Member Inquiries
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. We have a call with them on 30 September to see what their intentions are. If they choose to move forward, they will have time to apply for the fall RAILS Automation grant period.
- Hamilton Public Library - applying for RAILS Automation grant this fall to join RSA.
- Camp Point Public Library is interested in joining RSA. We sent them additional RSA membership information, including the overall list of services and holds filled counts and where those holds come from for comparable libraries in their area in September.
- Other public libraries are interested, but none have moved forward yet.

Other Notable Membership Activity
Mason Memorial (former Union List) – cataloging to prepare to become automated
- Has been cataloging collection already
- Discussed timeline for cataloging and patron entry; path to full automation

Bushnell-Prairie City CUSD #170 (former Union List) – Not automated in RSA
- We are scheduling a visit with them for October to do a New Directors/Moving Up/Parameters Party combo visit. We'll learn more about their intentions at that time.

Henry-Senachwine CUSD #5 (Grade/Jr High & High Schools) – frozen membership for years due to lack of staff, started working on updating their collection last year.
- They have also asked about getting up and running in eRead IL which will require them to provide barcodes to their students so they can be authenticated by our system.

In the first half of October, we will delete all patrons and items belonging to the 7 members who withdrew from RSA rather than sign the IGA.

RIP Updates: Ongoing Topics & One-Offs

List of major RSA Independence Project (RIP) to-do's RSA Admin needs to complete in FY25.

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 still needs a lot of work.

IMRF (Illinois Municipal Retirement Fund)
- IMRF legal has started their review process of our budget to determine membership suitability.

LIMRiCC
- We've been granted permission to join LIMRiCC. Work on hold for now as LIMRiCC deals with their program changes for this year and open enrollment. There is a massive package of paperwork we have not started on yet.
- RAILS health coverage for calendar 2024 includes 2 additional vendors for the HSA and co-insurance for high deductible (PPO or HMO) plans. With the changes to LIMRiCC coverage, RAILS involvement in these programs may change. We'll review options after RAILS related coverage changes are completed.

Mission Square
- We have large package of paperwork to fill out to get RSA setup. No time to start on it yet.

Payroll & Other Benefits
- RAILS provides our payroll and has a very generous overall benefits package to help them attract staffing in the Chicago area. RAILS also has over 50 employees and must follow FMLA and other rules. The final benefits package will need help from outside consulting.
- We are beginning to ask around for post-staff hiring HR and Payroll vendors.

Staff Handbook & Staff Policies
- We will work backwards from the RAILS staff handbook and policies. Some items don't make sense for RSA. We'll bump these against those from PrairieCat, CCS, and SWAN to make sure we've covered everything. We will need a consultant here as well if the same consultant for Payroll and Benefits doesn't do this work.

Staff Pay Scale
- RSA will need a pay scale with 6 to 7 levels with relatively wide pay bands. This will be worked in conjunction with other staffing and benefits processes.

Job Descriptions
- We have begun an initial review of the existing job descriptions. We need to rewrite them to reflect RSA's new operations and remove RAILS legacy items.
- We have mocked up a plan with 3 levels of job responsibilities for non-supervisory cataloging and operations positions. On top of that are the supervisor and administration support positions. This will allow flexibility to hire new staff with lower skill levels and experience as well as allowing the promotion of staff internally to higher levels of responsibility. Current positions are at the middle of the three new levels.
- Updated job descriptions will need to be reviewed by HR experts. We may need to benchmark them for salary scale depending on what our outside experts advise. The current RAILS job descriptions just completed benchmarking in early 2024.

Computers, Software, IT Infrastructure
- We DO NOT need to migrate away our Salesforce Help Desk! Salesforce says we can keep our current contract terms and renew as long as we don't change the contract. This is great news for the short-term as we have lots of data and case specific notes in Salesforce.
- RSA Support Staff can not migrate off RAILS provided systems due to FOIA compliance until directly employed by RAILS. We can set up systems prior to this, but not migrate over.

- Converting from a Not for Profit means new contracts with vendors. NFP's receive many more free or reduced price products then governmental entities. We will usually be grouped into the educational group for vendor contracts and payment levels.
- We have a meeting on 1 Oct with IT 360, a local IT company with Office 365 expertise. They also support some member libraries.
- We plan to set up Microsoft Office 365 for RSA. We are looking into licensing that would allow one email per library to replace the RSA Gmail accounts.
- 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.
- 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.

Consulting & Contracts
- Consulting: SWAN & PrairieCat's consultants aren't consulting anymore. Joe at RAILS is looking at Chicago area consultants used by libraries. I have 2 Peoria area consultants recommended by our insurance company's HR group that I'll be contacting soon.
- We await an update from SirsiDynix on our contract talks. The current contract ends on 28 Feb 2025.
    - SirsiDynix is aware we intend to issue an ILS RFI to look at the state of library automation software in 2026. If that process supports migration, we'd do an RFP to find the replacement system in 2026/2027.
    - We have requested a long term contract from SirsiDynix with an option to drop the contract at the end of year 2. This allows RSA to benefit from 2024 long-term pricing.

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. This will be a multi-year odyssey.
- No major action in September.

System Updates, Projects, Issues: Ongoing Topics & One-Offs

These are the major projects *which patrons see, will see, or are affected by directly*.

RSAcat Mobile 2
We are still working with SirsiDynix to set up a testing instance of RSAcat Mobile 2 (SirsiDynix's BLUEcloud Mobile 2). We believe this new app will allow each library to have a more personalized header and maybe more. We've updated more app store accounts and SirsiDynix is able to do what they need to do in our name now, we think. We are awaiting SirsiDynix to set up the base level app with minimal customization so we can start reviewing it.

RSAcat Header Name/Logo Updates
As part of the RSAcat 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 RSAcat profile header name, logo, and colors. We will use those requests to match, as well as we are able, the RSAcat Mobile 2 'skin' for each library. No updates until we have RSAcat Mobile 2 to review so we know what to ask for.

RSAcat Online Payments

RSAcat and RSAcat Mobile both can allow online bill pay. RSAcat currently has 24 online bill pay libraries, all those who requested it. This was previously a Full Online only feature. 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.

Automatic Renewals of Materials
Symphony can auto-renewal items with available renews that aren't needed to fill a hold on their due date. Normal PL has done this for years. During Parameters Party discussions, many more libraries are now interested in this feature. We are working with these 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.

As of Friday the 27th, we now have 7 libraries configured and operating with automatic renewals.

Website Accessibility Checkups
Awaiting RAILS guidance 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. The new catalog SirsiDynix is working on, which will replace RSA's current catalog, initial roll-out in 2025, includes full accessibility support.

Staff Updates Since the Previous Meeting

Staff Anniversaries
    October
- Rhonda Bierman – 12 years

RSA Staff Long-term Project: Expectations
At our first in person all staff meeting in September, we started a multi-meeting discussion revolving around expectations. What should members expect from each other, what should members expect from RSA staff, and what should RSA staff expect from each other? It will take several sessions to brainstorm and outline expectations at all levels. We'd like to have final documents coving these expectations by the end of this fiscal year.

Administrative Updates Since the Previous Meeting

Everything in this section is new or updated since the last meeting. Nothing is in red because it's all updated!

Expectations (will move to RIP section in future reports)
This is also a topic for both the Board and the DAC. There is an agenda item to start the Board discussion at this meeting. The December DAC agenda also has this as an item for discussion. RSA's old expectations document, from 2016-ish, is useless at this point. We have a few member expectations are outlined in the bylaws, but those are quite general in nature.

The idea is to brainstorm, outline, and ultimately adopt a set of expectations that applies to and is enforced, with gentle touches and love, on members and RSA. For RSA the organization, this is effectively a kind of service level agreement for our interactions and support.

RAILS LLSAP Grant Application – Due Date of 15 September
The grant application, and many spreadsheets of data were submitted to RAILS ahead of the cut-off date. We did submit a supplemental data dump for school collection budgets on the 26th of September. The school data is the hardest to collect and has required extra time each year which RAILS allows.

Outreach Campaigns
- The Cataloging Department's specific 'Bug Us' materials will be ordered very soon. It is hoped we can delivery it before Halloween. It's fitting!
- Work is ongoing for the Board's 'Bug Us' materials. The Board's bug will be a butterfly. As the visible face of RSA, the Board should get the most flashy and beautiful of bugs. We hope to present a protype for feedback at this meeting.
- The 'Bug Us' Team is working on materials for two additional campaigns: the Operations Department and a card for Reports. These would roll out later this year and in early 2025.
- 'Focus on the Forums' is a new email campaign to introduce individual email forums and their general subject matter to our members. The first email goes out on Monday the 30th.

While not a traditional outreach campaign, Antony is looking for School librarians to help him create, edit, review, and publish a School Operations manual.

Audit and Tax Forms
Our auditors, CLA here in Peoria, are just about finished with our audit. They'll present their finding to the Board in November. Once they finish the base audit, they'll start working on our final 990 forms for IL and Federal Taxes.

BLUEcloud Analytics (BCA) Interactive Reports
We have added a new report to the BCA page, Transit Counts To and From My Library Interactive Dashboard. This shows all items the system has asked you to transit to fill a hold, or to return to another library. Take a look, I think you'll be surprised by how far and wide you send materials. This is the fourth interactive dashboard posted on the BCA page of the Support Site.

If you have suggestions for visual reports to help explain to your library Board how RSA's services make your library the best it can be, please let us know! If we can create something to help, we'd like to.

Completed RSA Events: Training & Visits

Training sessions or member visits can be either in-person, virtual, or in some cases both.

September Events:

Location	Campaign Name	Campaign Type
LaHarpe Carnegie PLD	FY25 Parameter Party	Member Services
Eureka Middle School	FY25 New Director visit	Member Services

Eureka High School	FY25 New Director visit	Member Services
Danvers Township Library	September Board Meeting	Governance
Fondulac PL and Zoom	DAC - Fall 24	Governance
M-C River Valley Public Library District	FY25 Parameter Party	Member Services
Zoom Training Session	Basic Circulation Workshop	Member Services
Illinois Prairie DPL	Basic Patron Registration Workshop	Member Services
Four Star PLD	FY25 New Director Visit	Member Services
Viola Public Library District	Cataloging Site Visit	Cataloging
Atkinson PLD	FY25 Parameters party	Member Services
Zoom Training Session	Online Basic WorkFlows Cataloging Workshop	Cataloging
Clover Lib District	FY25 Parameters party	Member Services
Galesburg via Zoom	FY25 Parameters Party	Member Services
Fondulac Public Library District	Cataloging Site Visit	Cataloging
Beardstown Houston MPL	FY25 Parameters Party	Member Services
Viola PLD	FY25 Parameter Party	Member Services
Ransom Memorial Public Library	FY25 Parameter Party	Member Services
Salem Public Library	FY25 Parameter Party	Member Services
Carthage PLD.	Cataloging Site Visit	Cataloging
Galva PL via Zoom	FY25 Parameters Party	Member Services
Warren County PL via Zoom	FY25 Parameter Party	Member Services
Williamsfield	FY25 Parameter Party	Member Services

Cataloging Department Report – 3 October 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 September 5th RSA Board meeting, the CMC has processed:
- encoding level 8 requests = 25
- encoding level M and braille requests = 11

739 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 September 5th, the RSA cataloging department has upgraded 88 brief records to OCLC records with full bibliographic description. The number is lower this month due to cataloging staff time off.

RSA is currently upgrading brief records entered into WorkFlows in February 2023. We are backtracking to schools whose brief items we did not upgrade due to summer break.

Cataloging Site Visits

Since the September 5th Board meeting, the RSA cataloging department conducted three cataloging site visits:
- Carthage Public Library District (in-person)
- Fondulac District Library (in-person)
- Viola Public Library District (in-person)

Combined, these visits reached 4 library staff for a total of 6 ½ hours.

Cataloging Training

The condensed Basic WorkFlows Cataloging Workshop launched on September 17th as a single day, four hour Zoom session. The registration was full at six library staff. The workshop went very well and even ended a bit early!

There was no Bibload Workshop scheduled for September.

Work is underway revising the WorkFlows Item Group Editor documentation. The plan is for training to begin later this fall. Please watch the Cataloging email forum for updates.

The RSA cataloging department participated in a few training events in September:
- We've Got This Under Control: Learn All About Authority Control (LACONI)
- Whose Research Is This Anyway?: Studying Cataloging Theses (Cataloging Maintenance Center)
- Cataloging Audiobooks (OCLC)

Other Cataloging Projects

- The RSA cataloging staff is putting the finishing touches on a Cataloging Bug Us card to be released in October, just in time for Halloween. The card will be shared on the Cataloging email forum and the RSA support site. Printed Cataloging Bug Us cards will also arrive in delivery. Please be on the lookout!

- The survey for school libraries to share their cataloging needs closed on September 20th with 17 responses. The RSA cataloging staff are reviewing the responses, following up with the schools, and promoting cataloging site visits. The Operations Department will help those schools that are unfamiliar with checking their holds picklists.

- RSA has been conducting a special database maintenance project for Chatsworth Area Library. RSA has been re-cataloging Chatsworth VHS currently on DVD records on the correct records that describe the videocassette format. Since this project started in June, 44 VHS have been re-cataloged on the correct records, improving search and display of these items in both WorkFlows and the RSAcat.

- Work is underway to get ready for the first RSA Cataloging Chat scheduled for September 27th on Zoom. This will be a great opportunity for members to learn what's new with the Cataloging Maintenance Center, RAILS Cataloging Services, and the RSA cataloging department since the last Database Committee meeting in May. About 20 members are registered at the time of this report. Below are a couple of topics from the Cataloging Chat that may be of interest to the Board.

- OCLC Holdings Manager (OHM), the process used to batch update RSA libraries' holdings each month in OCLC, recently encountered trouble. SWAN, which developed OHM, has been working with OCLC to troubleshoot the issue. RSA will post to the Cataloging email forum once OHM updates have resumed. In the meantime, you may notice items cataloged in WorkFlows do not have their holdings updated in OCLC. You may also notice items discarded or deleted from WorkFlows do not have their holdings removed in OCLC.

- Incorrect numbers of large print items are sometimes returned when searching by the LARGEPRINT item cat 3 code in Item Group Editor, the Call Number & Item Maintenance "pickaxe" advanced search, running BLUEcloud Analytics item cat 3 counts, or searching RSAcat. The problem stems from WorkFlows indexing not being updated after a custom script changes the large print item from the BOOK to the LARGEPRINT item cat 3. The indexing trouble is sporadic, not daily. To stop the indexing trouble, RSA is looking into reconfiguring the item cat 3 script to ignore any item already assigned the LARGEPRINT item cat 3. Reconfiguring the script may take time due to its complexity. RSA plans to ask SirsiDynix for help.

Operations Department Report – September 2024

Parameters Parties

As of September 26, 12 Parameters Parties have been completed, and 45 more are in progress. Parties are considered complete once all the tickets raised have been closed. 295 cases have been raised from the 57 parties held. 209 of these are closed at time of writing. The team is working through their third region right now. Invitations to sign up for a Party will be sent to public library directors in the Northern region in early October with invitations to the Central libraries scheduled to go out in early November.

We have now received requests from 21 libraries to have auto renewals turned on. A process for working through these requests has now been developed and auto renewals have been activated for 6 of these libraries so far.

Documentation Index Update and Support Site

A new version of the Documentation Index will be uploaded to the support site on or near to the end of September. This newest version indexes 313 documents with an average age of 33 months. 109 of these documents have been created or updated since January 1st, 16 of these in September alone. The index can be found here: https://support.librariesofrsa.org/project/documentation-index/.

We have completed working through updating Operations department documents which have accompanying videos on YouTube. The documents now have a link to the video, and the video description has a link back to the document. In addition, many document and video titles were amended to match. It is intended to complete this same work with Cataloging department documents in October.

Another focus of updates in September was to update the documentation we have on MobileStaff which can be installed on library owned devices. MobileStaff is now available to all RSA libraries and so it seemed a good idea to update our documentation. These can be found on this page: https://support.librariesofrsa.org/project/mobilestaff/. Elizabeth Wild at Henry Public Library provided valuable feedback after road testing for us. Her feedback can also be found on the page.

Schools

Documentation specifically aimed at schools has now all been gathered on the support site's new School Handbook page which can be found here: https://support.librariesofrsa.org/handbook/schools/.

During October, we hope to put additional work into this page to clarify the structure and order of the page. Once this is complete, we will email the school email forum and ask for feedback. At this time, we will also ask for volunteers to join a working group to develop an Operations Manual for schools and seek guidance on what other documentation schools might specifically find helpful.

Although school Parameters Parties are not scheduled to happen before the new year, staff are reaching out to three schools during the month of October. One of these was the last Union List member and the other two are from a district who haven't previously allowed holds or received deliveries. We're hoping that we can show the value-added of automating and, by working with RAILS delivery, potentially get delivery activated for these three locations.

Email Forums

During October we will be writing to each of the new email forums managed through simplelists encouraging staff who have subscribed to use them as forums to discuss issues with each other. This has not previously been possible, but the new forums were designed to foster intra-library discussions and cooperation. However, as the staff at member libraries are not used to participating in this way it will need something of a kick start, and these emails from us will hopefully be designed to provide this stimulus.

We have sent out several email from the old MailChimp listserv system reminding library staff to sign up for the new forums and unsubscribe from the old listserv. The last of these reminders is scheduled to go out on October 14. Shortly after that it is planned to shut down the old listserv.