



Resource Sharing Alliance
715 Sabrina Drive
East Peoria, IL 61611
866-940-4083

29 August 2024

Subject: FY25 Directors Advisory Committee (DAC) Members

<u>Position</u>	<u>Name</u>	<u>Library</u>	<u>Term Expires</u>
Chair / Board President	Genna Buhr genna@fondulaclibrary.org	Fondulac Public Library	30 June 2025
Board Member	Bobbi Mock vetslibrary@gmail.com	Illinois Veterans Home	30 June 2026
Appointed 1	Rachel Ballenger director@towandalibrary.org	Towanda District Library	30 June 2025
Appointed 2	Amy Gee carthagelibrarydirector@gmail.com	Carthage Public Library District	30 June 2025
Appointed 3	Cindy Maxwell maxwellc@kewaneeclibrary.org	Kewanee Public Library District	30 June 2026
Appointed 4	Kristen Tortat ktortat@ivcschools.com	Illinois Valley Central School District	30 June 2026
Appointed 5	Randall Yelverton randallyelverton@ppl.peoria.lib.il.us	Peoria Public Library	30 June 2026



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21 August 2024

Subject: FY25 RSA Directors Advisory Committee (DAC) Calendar

DAC meetings are scheduled for the dates below, starting at 1 PM unless otherwise noted.

Please refer to the DAC page of the RSA Support Site for guest attendee Zoom registration links.

FY25 Meeting Dates

Date	Day	Time	Location	Notes
9 Sep 2024	Monday	1 - 3 PM	Fondulac Library – Public Meeting Room	
11 Dec 2024	Wednesday	1 - 3 PM	Kewanee Public Library	
12 Mar 2025	Wednesday	1 - 3 PM	Peoria PL, Main St Branch	
14 May 2025	Wednesday	1 - 3 PM	Brown County Public Library	

DAC Executive Director Report – 4 September 2024

Note: Each Board meeting package includes a full Executive Director, Operations Department, and Cataloging Department report. You can download and review them from the Board page <https://support.librariesofrsa.org/about/board-of-directors>. Reports are combined as the “RSA Reports’ link and are posted starting with the 1 August 2024 meeting.

The Cataloging and Operations Reports in the Board packages contain a wealth of information not included here.

Membership Updates Since 1 July 2024

The following school libraries withdrew from RSA as of 1 July 2024 due to the price increases phasing in through FY29. RSA will be removing these library’s patrons and collections in early to mid October. We left everything in the system for now in case they needed additional support or fresh data extracts for their new, stand alone systems.

- Canton CUSD #66 High School
- Farmington Central CUSD #265 High School
- Heyworth CUSD #4 – High School and Elementary School
- Olympia CUSD #16 – High School, Middle School, North Elementary, South Elementary, and West Elementary
- Pleasant Plains CUSD #8 – High School and Middle School
- St. Mark Catholic School
- West Central SD #235 – Combined High and Elementary School Library

We are also tracking a list of potential school withdrawals at the end of FY25. As of now, there are five additional school members considering withdrawal, some for price, others for lack of use, and some from lack of overall support from the district.

On the plus side, we are in touch with several potential new RSA member libraries. We know one public library intends to apply for the RAILS Automation Grant in November, and we have a school library that may also apply in November. There are also a couple other public libraries in various stages of consideration of joining RSA.

Staff Updates

Staff Anniversaries

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

RSA Independence Project (RIP) Updates

The completion of phase one of the Independence Project, the governance conversion and new fee structure, mark the end of the Member Library involvement. Phased two and three include setting up the full benefits, pay, HR, and more required to directly employ staff and moving ALL hardware and software used by RSA staff in their day-to-day support of our members.

Here is a quick list of the major things RSA Administrative staff are working on to prepare for employing staff.

A Hiring Timeline & Punch List

- Finish building out 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.

IMRF (Illinois Municipal Retirement Fund)

- Current RSA staff are vesting in IMRF. RSA needs to become an IMRF employer to retain current staff and be successful in hiring new staff in the future.

LIMRiCC

- RSA is pursuing LIMRiCC membership and benefits. RAILS uses LIMRiCC and we'd like to be able to provide the same, or close to the same, coverage through the transition.

Payroll & Other Benefits

- Researching potential outside consultants. If you know of a company that does this type of consulting, please contact Kendal.

Staff Handbook & Policies

- We'll start with the current RAILS policies and work backwards into policies that make sense for future RSA. This is another area we're looking for consulting help with.

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, duties, and verbiage.
- RSA will be expanding our departments out into 3 levels of responsibilities, plus a supervisor role. This will allow flexibility to hire new staff with lower skill levels or experience and provide a path for upward mobility and higher responsibilities. All current staff are filling what will be the middle of the three levels.
- We also need to build one or two additional, new positions to cover the increased responsibilities, workload, and new duties transferring from RAILS to RSA (HR, payroll, etc.)

Computers, Software, IT Infrastructure

- Transitioning away from a 501c3 Not for Profit has negative repercussions on the software and services front. All software and outside services RSA currently uses need to be transitioned from the free NFP tier to a paid educational/governmental tier.
- The help desk is the most urgent need as our NFP contract expires at the end of November.
- We are investigating a transition of the RSA provided Gmail accounts to RSA owned and operated Microsoft Office 365 accounts. Gmail is getting harder and harder to support.
- RSA hopes to be ready to move all our email addresses, staff and help desk, off the RAILS domain to RSA's email domain, librariesofrsa.org, on 1 July 2025.
- Zoom, telephones, laptops, printers, and everything else RSA Staff use to do their job will be moved to RSA accounts, or purchased new by RSA as makes sense. We can continue to utilize some RAILS IT infrastructure through June 2026.

Conversion to III Cleanup

- We continue to work on making the name, and when appropriate, the governance 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.

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. We may be reaching out to members to ask for data or verify the data we have on hand.

RSA's membership count reduction and all other grant statistical data are smoothed with a three-year rolling average. This will smooth out the reduction over a couple of years 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.

The week of August 19th, we emailed each school branch, and all school staff that we know about, 4 emails with various information we think are the most important for the beginning of the school year. The contents of these emails was repackaged and posted to the Support Site as a guide to the Schools Handbook. We are continuing to build the handbook out over the next few weeks. The goal is to include any and all school documentation in the overall School Specific page to make it a one-stop shop. We'll be working with some schools to create a school specific Operations Manual.

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

Our work on new BCA reports has slowed as I'm now the only person on staff who understands both BCA and the layout of Symphony data enough to make detailed reports. The date structures on these interact but aren't the same, and you can easily create reports that provide inaccurate data.

We have decided not to fill the currently open Systems and Reports position due to the impending staffing transition. We may need to use the position for other duties when RSA directly employs staff. Another consideration is the 1–2-year training period to bring a new person up to speed for this work. It requires an analytical mind and a deep system level understanding of the Symphony database. For now, I'll remain the person setting up, modifying, and deleting BCA user accounts, and doing any BCA report modification.

Over the past two month, I was able to create three interactive dashboard reports accessible via direct weblinks. The dashboards we have now are:

- 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.

I plan to continue making new reports that allow directors and managers to get a better feel for what is happening in their library. I've 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. I'll work on creating new dashboards as I have time.

FY24 RSA Annual Report

We have created an Annual Report for the membership. That was included in the package for this meeting. This was created to be used as part of a return on investment document for each member next year.

System Updates, Projects, or Issues (with direct patron interaction)

RSAcat Mobile 2

We are working with SirsiDynix to set up a testing instance of RSAcat 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 initial 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. On Sep 4th, we received another package of setup documents we'll need to fill out and work through.

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 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 RSAcat Mobile 2 'skin' for each library.

RSAcat Online Payments

RSAcat and RSAcat Mobile both allow online bill pay. RSAcat is configured for online payment in 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 will be able to optionally enable it in their RSAcat profile.

Automatic Renewals of Materials

We have had the ability to enable automatic renews for several years now but only Normal PL decided to use it. We have 16 additional members who expressed interest in enabling this during their parameters parties. Right now, RSA is working with these 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. We expect to roll this out in multiple library groups as the setup is somewhat extensive. 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.

Completed RSA Events: Training & Visits

Here is a listing of recent training sessions and member visits both in-person and virtual.

July Events

Location	Campaign Name	Campaign Type
Cambridge PL	FY25 New Director Visit	Member Services
Heyworth PLD	FY25 Parameters party	Member Services
Chatsworth PLD	Parameter Party	Member Services
Danvers TL	FY25 Parameters Party	Member Services
Zoom	FY25 Holds Workshop	Member Services
Chenoa /Zoom	FY25 Parameter Party	Member Services
Towanda	FY25 Parameter Party	Member Services
Virginia MPL	FY25 New director visit	Member Services
Lexington / Zoom	FY25 Parameter Party	Member Services
Lillie M Evans Library	Board Meeting July 17 2024	Governance
Virginia Memorial Public Library District	Cataloging Site Visit	Cataloging
Atlanta PLD	Parameter Party	Member Services
Farmer City PL	FY25 New Director visit	Member Services
Pontiac PL/Zoom	FY25 Parameters Party	Member Services
Neponset Public Library	Cataloging Site Visit	Cataloging
MT. HOPE-FUNKS GROVE LIBRARY / Zoom	FY25 Parameter Party	Member Services
Carthage/Zoom	Online Basic WorkFlows Cataloging Workshop	Cataloging
Prairie Creek PLD	Parameter Party	Member Services
Hudson Area Public Library	FY25 Parameter Party	Member Services
Maquon DPL	Maquon New Directors Visit	Member Services
Gridley PLD	FY25 Parameter Party	Member Services

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
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

RSA FY24 Annual Report

2 September 2024

Mission: Uniting member libraries to increase access to information and materials through resource sharing.

Vision: Engaged, effective, and efficient resource sharing to empower strong libraries.

Strategic Direction: Relevant ongoing directions from RSA's expired Strategic Plan for 2019-2023:

- **Member Engagement:** RSA members understand engagement options and maximize engagement opportunities.
 - Informing and engaging members is a primary importance to RSA's overall success. At the heart of this engagement is communication with members about the availability of services and increased access for members regardless of location. Supporting peer coaching and leadership opportunities will be critical to increasing engagement.
- **Organizational Effectiveness:** RSA offers options for membership that suit the needs of our diverse membership and promote RSA self-sustainability
 - Members highly value their partnership with RSA. Increased communication to encourage participation and standardization will improve efficiency for all levels of membership.
- **Operating Efficiency:** RSA maintains the staff and internal operations to support member needs aligned with our financial resources.
 - RSA staff is integral to the work we do with our members on behalf of their communities. Members indicate a strong desire for more online and in-library training. New training models will allow for better member access, involving both technology and member facilities to alleviate geographic disparities.

Guiding Principles: Areas of focus while converting to a fully independent RSA:

- As directed by RAILS, fully convert RSA into an independent organization. Phase One was the governance transition completed on 1 July 2024, Phase Two is ongoing, reading RSA for directly employ our support staff on 1 July 2025. Phase Three involves moving all IT and daily operations fully to RSA owned and operated equipment, contracts, and services.
- Fully engaging with all RSA members – Direct in-person or remote meetings to re-establish system setup, cataloging site visits, in-person and online training, Membership Chats, and an internal goal of visiting every member at least once every other year.
- Enhance member-to-member collaboration, interactions, mentoring, and collaboration.
- Update the system with online circulation options, updated patron interfaces, simplified and streamlined training and operational processes, new reporting options, and a continual search for additional functionality that makes sense for our consortia. Ensure we maintain an automation system that works for libraries of all types and sizes.
- Start planning for a library automation industry Request of Information (RFI) process to gauge the ability of other vendors to fulfill RSA's complex automation needs. The RFI process is expected to be run in early 2026 with a potential competition between vendors for a new automation system depending on the outcome of the RFI process.
- Continued fiscal responsibility and stewardship of RSA member dollars.

Membership Makeup as of 1 July 2024

Number of Members: 135

Total Count of Automated Member Buildings: 175

- Public Libraries: 96 + Branches: 19
- School Libraries: 34 + Branches: 21
- Academic Libraries: 3
- Special Libraries: 2

RSA Public Library Population Served Counts:

- Under 2,000 served: 34 – smallest library serves 596 people
- 2,001 to 4,000 served: 25
- 4,001 to 10,000 served: 21
- 10,001+ served: 16 - largest library serves 113,150 people

RSA Non-Public Library Student Enrollment or User Counts:

- 1 to 200 students: 10 – smallest enrollment is 107
- 201 to 500 students: 14
- 501 to 1,000 students: 11
- 1,001+ students: 4 – largest enrollment is 1,519

RSA Support Staff Breakout

Executive Staff

Kendal Orrison – Executive Director
Antony Deter – Assistant Director
Open position – Business Manager

Cataloging and Database Staff

Erica Laughlin – Cataloging and Database Supervisor
Rhonda Bierman - Cataloging and Database Coordinator
Jennifer Choate - Cataloging and Database Coordinator
Erin Roberts - Cataloging and Database Coordinator
Lisa Schemensky - Cataloging and Database Coordinator

Operations Staff

James Campbell – System Supervisor
Tony Hahn – Member Services User Experience Coordinator
Patty Kweram - Member Services Coordinator
Sara Naslund - Member Services Coordinator

Training and Engagement

	FY24	FY23	Change +/-
Sessions Attendees	804	657	22.3%
Sessions Hours	306	157	94.9%
Total Contact Hours	2,684	1,990	34.8%
Training Events	41	54	-24.1%
Site Visits	57	3	1900.0%
Meetings	26	13	100.0%
YouTube Views	2,824	1,459	93.6%
YouTube Hours Watched	344.8	199.3	73.0%

RSA-Wide Statistics

	FY24	FY23
Record Counts:		
Total Titles	1,066,626	1,085,655
<i>Title Records (non-Brief)</i>	1,011,941	1,018,856
<i>Brief Title Records</i>	54,685	66,799
Items	4,277,018	4,435,322
<i>Public Items</i>	3,681,916	n/a
<i>Non-Public Items</i>	595,102	n/a
Users	301,087	322,501
<i>Public Users</i>	254,364	n/a
<i>Non-Public Users</i>	46,723	n/a
Circulation Counts:		
Total Checkouts, Renewals, & Mark Item Used	4,567,453	4,785,776
<i>Public Circ</i>	4,274,010	4,450,237
<i>Non-Public Circ</i>	293,443	335,539
Public Library Reciprocal Checkouts & Renewals	682,501	742,842
<i>RCIP by RSA Patrons in Other RSA Libraries</i>	368,646	379,673
<i>RCIP by Patrons with RCIP User Profiles</i>	313,855	363,169
Intra-RSA ILL (member to member loans)	633,909	644,294
<i>Public ILL</i>	578,842	584,410
<i>Non-Public ILL</i>	10,209	11,357
<i>RSA Staff holds & various system maintenance tasks</i>	44,858	48,527
Outside RSA ILL (D1500 Checkouts Only)	14,461	13,296
Mark Item Used	754,030	681,607
<i>Public</i>	621,260	558,990
<i>Non-Public</i>	132,770	122,617
Checkouts VS Renewals:		
Checkouts	3,445,283	3,567,149
Renewals	1,138,472	1,227,997
Patron Renewals in RSACat/RSACat Mobile	582,446	466,204

Holds Counts:

Holds Placed	611,875	610,985
<i>Public via RSACat & RSACat Mobile</i>	379,308	n/a
<i>Public via Workflows</i>	211,573	n/a
<i>Non-Public via RSACat/Mobile</i>	9,356	n/a
<i>Non-Public via Workflows</i>	11,638	n/a
Holds Filled	569,144	517,488
<i>Public Filled</i>	548,064	n/a
<i>Non-Public Filled</i>	21,050	n/a
Hold Canceled	55,235	56,488
Hold Expired	1,670	1,572
Holds filled by other library's Items	407,230	379,390

Cataloging

	FY24	FY23
Items Added	228,837	232,586
Items Deleted (estimated)	387,000	319,000
RSA Cataloger Brief Records Upgraded	4,054	2,956
RSA Cataloger Original Records Created	295	300
RSA Backlog Cataloging Requests Closed	3,284	n/a
WorkFlows Cataloging Accounts Created	60	51
WorkFlows Cataloging Parameters Created	113	63

Help Desk

	FY24	FY23
Tickets Opened	7,799	5,822
Tickets Closed	7,635	5,822

Total tickets opened since go live on 12 Dec 2021 – 36,911



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4 September 2024

Subject: Bylaws DAC Description

Section 1: Directors Advisory Committee

The RSA Board Directors Advisory Committee is made up of the RSA Board President, one other RSA Board member, and five (5) appointed library directors. Appointed members serve two (2) year terms.

The Committee shall establish a schedule of regular meetings as it deems appropriate, except that the Committee shall meet not less than four (4) times per calendar year. Meetings of the Committee will be held at specific times and places which are convenient and open to the public. Robert's Rules of Order, latest edition, shall be applicable to the conduct and business of such meetings on all matters not covered by these Bylaws.

Meetings shall be noticed, held and otherwise conducted in conformance with the Illinois Open Meetings Act. Each July, the dates of regular meetings of the Committee shall be established by a majority vote of the Committee and the annual schedule of meetings will be posted and distributed to the Member Libraries.

Any matter moved for passage or approval shall be deemed to have passed if it shall receive the affirmative vote of a simple majority of the members of the Committee present at a meeting at which a quorum is present.

All library directors, director appointed representatives, and school librarians are encouraged to attend these meetings as guests, and share their comments, concerns, and ideas during discussion and during agenda guest comment items.

The primary purpose of the Directors Advisory Committee is to gather feedback, present plans, policy updates, share and gather strategic plan ideas, and generally comment on the operations of RSA. This Committee is the primary feedback mechanism for Directors to share directly with the Board.

Resource Sharing Alliance Patron Notes Policy

1. Patron Notes:

- a. Notes are to be used for internal alerts such as: Need telephone number; Need birth date; Mail returned; Do not honor this card; etc. All notes should include the date entered, initials of staff, and library name. Use this format: 8-16-18 (BODY OF NOTE) MT/WASHINGTON PL
- b. Notes should contain factual non-bias information.
- c. All libraries are to remove unnecessary notes on their patron's accounts.
- d. If the checkout library is able to resolve an issue in a note, notify the patron's home library by telephone or an email to the patron's home library's RSA Gmail account to remove the note.

Approved by the RSA NFP User Group on 1 March 2012

Revised December 2012

Notes

Comments

What can be deleted by check out library

What has to be deleted by the patron's home library

Questions??

Contact the RSA help desk at rsahelp@railslibraries.info or RSA staff at 866-940-4083

Receipt of Damaged Material Policy

For the purpose of this policy, severe damage is defined as substantial and immediately apparent physical damage to an item or a case or missing components.

DO NOT REPAIR ANOTHER LIBRARY'S ITEMS.

1. Any time an item is received with damage, create a CIRCNOTE in the item record in Workflows and attach a post-it note to the item including the following information:
 - a. Item was received damaged
 - b. Description of damage
 - c. Date
 - d. Staff member initials
 - e. Library name
2. If the damage is severe, do not check out to the patron. Return the item to the item-owning library through delivery.
 - a. Check out the item to the item-owning library's RSA created D1500 user account.
 - b. Override any popup boxes to allow checkout to the D1500. Do not remove any holds. This will allow WorkFlows to route another copy of the item to your patron for the hold.
3. If the item is in circulating condition, check out to the patron with instructions not to remove the post-it note.

Item damaged by patron

1. Call the item-owning library to discuss the damage and determine the next step. (If the library where the item was returned is not the checkout or the owning library, that library will contact the item-owning library). If a patron wishes to resolve the issue immediately, and the damage is unambiguous, the library where the item was returned may elect to apply the bill without consulting the owning library. Bear in mind that it may be to the patron's benefit to contact the owning library.
2. If patron is to be billed, the checkout library (or the library where the item was returned if it was not the checkout library) will create the bill on the patron's account.
3. The item-owning library has final determination regarding damage.

Transited item received damaged at item-owning library

1. Call the checkout library to discuss the damage and determine the next step.
2. If patron is to be billed, the checkout library will create the bill on the patron's account.
3. The item-owning library has final determination regarding damage.
4. If patron is billed for the full replacement cost of the item, send the damaged item back to the checkout library for review or to keep once bill is paid in full.

If the item is lost or damaged and the bill is never paid by the patron, the item-owning library will absorb the item's cost.

Approved by the RSA NFP Users Group 7 November 2019



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Patron Cards Policy

Last updated August 1, 2024

RSA's policy is one card per patron unless addressed in RSA policy.

For the purposes of RSA policies, the terms Patron, User, and Borrower are interchangeable.

Refer to RSA's other Patron Policies when creating and maintaining User Accounts in WorkFlows:

Patron Registration policy

https://support.librariesofrsa.org/project/users/#Patron_Registration

Patron Notes policy

https://support.librariesofrsa.org/project/users/#Patron_Notes

Retention Schedule for Expired Patron Cards

https://support.librariesofrsa.org/project/users/#Retention_Schedule_for_Expired_Patron_Cards

In addition, to avoid duplicate users being entered into WorkFlows the following procedure must be followed:

Reciprocal Deletion Procedure and Form

https://support.librariesofrsa.org/project/users/#Reciprocal_Patron_Deletion_Form_and_Procedure

Staff of RSA Member Libraries

Staff who live in one library district and work in another must choose between either:

- a staff card where you work – use courtesy for intra-library loan materials, or
- a home library card where you reside.

Teacher & Student Cards

School library cards are to be used only at the issuing school facility. Those with school library cards may also be eligible for a public library card associated with their residential address.

Residents

Refer to Resource Sharing Alliance Patron Policies above.

Non-Resident Cards

Non-Residents Purchasing a Card

(See Appendix A; Illinois Administrative Code Title 23 Part 3050 Sections 20 and 40)
<https://www.ilga.gov/Commission/jcar/admincode/JCARTitlePart.asp?Title=023&Part=3050>.

When creating the user account use the following user profiles:
NRES-A, NRES-DNT, NRES-J, NRES-SR, NRES-YA

A non-resident fee of \$999.00 will be automatically assessed when the user account is created and will be assessed yearly, when the card is renewed, as an alert to the library staff that the patron is a non-resident. Library staff will use the Paying Bills wizard to adjust the privilege fee to their local non-resident fee.

Property Owner/Taxpayer

Property Owner/Taxpayers are exempt from RSA policy of one card per patron but generally are limited to one card per property.

(See Appendix A; Illinois Administrative Code Title 23 Part 3050 Section 20 and 40, Local Library Act (75 ILCS 5/4-7 (12)) and Public Library District Act (75 ILCS 16/30-55.60))

When creating the user account, use the following user profile:
TAXPAYR

Cards for Kids and Cards for Vets

Recent legislation has enabled libraries to provide Non-Resident cards to children and qualifying Veterans. Please refer to RSA documentation on Cards for Kids here: https://support.librariesofrsa.org/project/users/#Cards_for_Kids and Non-Resident Library Services for Veterans here: https://support.librariesofrsa.org/project/users/#Non-Resident_Library_Services_for_Veterans.

RSA Reciprocal Borrowers

An RSA Reciprocal Borrower is a person who presents a library card that is registered at another RSA library.

RSA Reciprocal Borrowers use the card from their issuing library.

A Consortial Interlibrary Loan is one where an item is both requested and supplied from within a consortium. A non-consortial Interlibrary Loan is one where the item is requested from or by a library from outside the consortium.

An RSA Reciprocal Borrower must return to their home library to renew their card.

Changes may be made only to telephone numbers, email addresses, or PINs in their user account in WorkFlows by the checkout library. RSA Reciprocal Borrowers should be directed to their home library for all other user account changes. The home library is the one that issues the card to the patron.

Non-RSA Reciprocal Borrowers

A Non-RSA Reciprocal Borrower is a person who presents a current public library card that is registered at a non-RSA member library in Illinois, for example: Bloomington PL, Parlin Ingersoll PL, or Rockford PL.

Once it has been established that no other RSA online library has registered the patron or given the patron a barcode, and the library has confirmed that the card is valid and current, the library will register the patron and may attach a barcode to the home library card.

Use the following user profiles: NON-RSA-A, NON-RSA-JV, NON-RSA-YA, NON-RSA-SR, or NON-RSA-ST (for those that classify college students differently than adults)

Information about the home library should be entered into Address 2 on the Addresses tab in the user's account.

In Address 2 include:

- Home library name
- Address
- Home library telephone number

Enter the expiration date from the home library in the user account.

If the reciprocal borrower wishes to check out an item but their card is **expired**, they can return to the RSA online issuing library to renew their card, or the checkout library may register the patron. Send a deletion form to the previous RSA online issuing library.

Non-RSA Reciprocal Borrowers cannot place holds or interlibrary loan items. They must return to their home libraries to do so. If you would like to offer the ability of NON-RSA users to place local holds on your items only, contact RSA to set up this option.

If you allow local holds, Non-RSA Reciprocal Borrowers are assigned a low hold priority. Their holds will not be filled until all the RSA patrons' holds are filled.

Children of multiple households

An exception to the Only One Card per Patron rule is that children who live in multiple households with different legal guardians are eligible to have a library card for each household, even if both legal guardians live in the same library service area.

Institutional Cards

Institutional cards are single user accounts the library issues to a daycare, senior center, group home, school, or other community entity.

These are to be used in situations when a library has reached an agreement with an institution in their service area, in which the institution itself has agreed to be responsible for items checked out to the institutional account, up to and including paying replacement costs for lost or damaged items. It is up to the issuing library which staff member(s) at that institution are allowed access to this card. Institutional accounts may be used to check out materials at the issuing library and to place holds on items owned by that library ONLY. If the issuing library would like the institution to be able to place holds on items belonging to other RSA libraries, the two entities need to sign an IGA.

These accounts should not be used to place holds on items owned by other RSA member libraries or to check out materials at other RSA members. RSA recommends that these cards be held by the issuing library, rather than by a staff member at the institution. Please use the INST User Profile when creating these accounts.

These accounts are not to be confused with D1500 accounts which are created by RSA and used to facilitate sharing materials with Union List Libraries and non-RSA libraries through interlibrary loan.

Approved by the RSA NFP Users Group June 7, 2012

Revision approved by the RSA NFP Users Group December 5, 2013

Revisions approved by the RSA Board of Directors August 1, 2024

Patron Registration Policy

Last updated June 4, 2024

This policy replaces both the Patron Registration policy last updated on February 7, 2019, and the New Patron Policy last updated on November 12, 2020.

For the purposes of RSA policies, the terms Patron, User, and Borrower are interchangeable.

Before registering a new patron, first confirm that they are eligible for an account in your library's service area. Follow issuing library policy in verifying patron address and identity.

Search Workflows to determine whether a prospective patron has an account at a public library in RSA. If the patron already has an account at another public library in RSA, request removal of the user account by submitting a [Reciprocal Deletion Form](#) to notify the former library. Libraries will address reciprocal patron deletions as soon as possible. Review any notes or special statuses (BARRED, BLOCKED, BANNED, PROBLEM, etc.) to ensure that any outstanding issues have been resolved.

- Any **bills** other than overdue fines **must be paid** before a new account may be created, and payment **for lost items** must be sent to the billing library. They may also pay through RSAcat (ProPay) or through the RSAcat Mobile App. If accepting payment for a lost or damaged item, pay the bill in Workflows but do not discharge the item. See [Notification and Billing Policy for Transited RSA Member Library Items](#) for more payment instructions.
- If a patron owes **overdue fines** but is otherwise in **Good Standing*** as defined below, the new library may create the new account. The former library will remove these fines when they process the Reciprocal Deletion Form.
- If a patron owes fines above their former library's block limit (user status "**BLOCKED**"), they must pay these fines before a new card can be issued. Any fines paid at the issuing library may be kept there. They may also pay through RSAcat (ProPay) or through the RSAcat Mobile App.
- If a patron has materials still checked out on the former account, materials must be returned before creating a new account. Materials may be returned to the new library

to be sent back through delivery.

If the patron does not have a previous account and are within your library area, they can be issued a card. To maintain a clean global database for all patron registrations, the following information is **required**:

- legal first and last name, middle name, or middle initial if applicable (Name field is the only attribute required for school libraries)
- date of birth
- address (complete physical and mailing address)
- telephone number (if available)
- email (if available)

Academic, school, and special libraries are exempt from the requirement to enter patron information beyond name fields.

Name standards:

1. CAPS lock must always be on. Example: MCNAIR not McNair.
2. Use of the Title field is optional.
3. No punctuation or spaces should be used, including the apostrophe ('). Example: OBRIEN not O'BRIEN; VANWINKLE not VAN WINKLE (but DO use hyphens (-) in hyphenated names, examples: JONES-SMITH).
4. Use of preferred name field is optional.
5. For names with suffixes, use the suffix field. Example: JR, SR, II.

Address standards:

1. CAPS lock must always be on.
2. Use a hyphen if entering a 9-digit zip code.
3. Spell out numeric street names only when there are duplicate street names within a postal delivery area.
4. Use Postal Service Standard Abbreviations when entering addresses.
5. Do not use punctuation in City/State field. Example: WASHINGTON IL.
6. If a patron has a separate physical and mailing address, enter both and select the appropriate option for primary address.
7. Include area code and hyphens when entering the telephone number. Example: 000-000-0000 not (000)-000-0000.
8. Patrons can receive notifications at multiple email addresses by entering them on the same line, separated by a comma with no space. Example:

BLAH@GMAIL.COM,BLAHBLAH@YAHOO.COM

***Good Standing** shall be defined as a patron who has no outstanding bills for lost items, collection fees, processing fees, fees for damage, or miscellaneous services. To be considered in good standing, fines should be below the patron's former library's block limit. If a patron's status is "OK" or "DELINQUENT," and the only fines they owe are simple

overdue fines, then for the purposes of this policy, they are considered to be in **Good Standing**.

Other considerations:

Patrons may have unfilled holds on their former account. Staff at the new library may be able to assist by placing these holds on the new card.

Patrons who use ADML (Libby) or eRead Illinois (Boundless) may wish to have their previous account merged with their current account to retain holds and checkout history.

New Patron Policy history

Approved by the RSA NFP Users Group on March 7, 2013

Revision approved by the RSA NFP Users Group on November 12, 2020

Patron Registration Policy history

Approved by the RSA NFP Users Group on March 1, 2012

Revision approved by the RSA NFP Users Group on September 5, 2013

Revision approved by the RSA NFP Users Group on November 3, 2016

Revision approved by the RSA NFP Users Group on February 7, 2019

Revision approved by the RSA NFP Board of Directors on June 4, 2024



Resource Sharing Alliance NFP
715 Sabrina Drive
East Peoria, IL 61611
866-940-4083

9 August 2023

Subject: Retention Schedule for Expired Patron Cards Policy

- Unencumbered expired library cards should be deleted within 2 years of the expiration date.
- Expired cards with a dollar amount of less than \$25.00 in fines* or lost items** should be deleted within 3 years after the expiration date.
- Expired library cards with a dollar amount of \$25.00 or more in fines or lost items should be deleted 5 years after the expiration date. Patrons sent to material recovery agencies may be retained for 8 years. Patron's home library may make case by case exceptions to retain accounts.
- School and academic libraries should delete all student cards no later than 2 years after the student has graduated.
- Per the [Notification and Billing Policy for Transited RSA Member Library](#) (Approved 11/2019):
 - If the item is lost or damaged and the bill is never paid by the patron, the item-owning library will absorb the item's cost.

*Excluding lost items, referral fees & processing fees, all other bills shall be removed by the patron's home library.

**If the lost items are owned by another library, contact the item owning library to promptly remove the lost items, referral fees and processing fees from the patron's account. The patron's home library shall then delete the expired card.

Approved by the RSA NFP Users Group 7 March 2013
Revision approved by the RSA NFP Users Group 9 August 2023

RSA_{NFP}

Resource Sharing Alliance NFP

Strategic Plan 2020-2023

Introduction

Resource Sharing Alliance NFP (RSA) is a consortium of libraries in central and west central Illinois sharing a common library automation system. RSA facilitates the circulation and sharing of materials among its 190+ member locations and is one of six Local Library System Automation Programs (LLSAP) inside the RAILS library system. Serving over 350,000 patrons across 13,500 square miles of Illinois, RSA supports a union catalog (RSACat) of 4,601,879* library items and an annual circulation of 6,115,330 with 645,300 items transited between member libraries. RSA has a staff of 10 FTE who work in Administration, Member Services, Cataloging and Database Services, and Systems.

This plan represents the overall strategy for RSA over the next four years and is presented to the Board of Trustees for approval in November 2019. Upon approval, RSA staff will finalize an activity plan to support the overall strategy and evolve as we work toward goals. Staff will regularly review progress toward meeting plan goals and report to the Board.

*All data as of June 30, 2019, as per [RSA website](#).

Planning Process and Data Highlights

RSA NFP engaged in a strategic planning process with assistance from consultant Amanda E. Standerfer from [Fast Forward Libraries](#). The Planning Team included:

- Kendal Orrison, Executive Director, Resource Sharing Alliance NFP
- Alissa Williams, Director, Morton Public Library District
- Barbara Love, Director, Kewanee Public Library District
- Brian Chase, Director, Normal Public Library
- Genna Buhr, Director, Fondulac Public Library District
- Bobbi Mock, Assistant Director, Quincy Public Library

In addition, the RSA Board interfaced with the process at several key points along the way, helping to design the member survey, giving feedback on the Learning Report, and carefully reviewing the draft plan prior to approval.

In order to create an actionable plan, we reviewed a wide variety of existing data, conducted a member survey, and spent time talking with members through focus groups and interviews.¹ The survey

¹ See full Survey and Focus Group Summary Report in Appendix.

garnered 172 responses, and four focus groups were held, allowing for virtual attendance by members who could not attend in person. Interviews were conducted with ten members and consortia stakeholders. The board then held a Summit with members in August to review these evaluations and determine strategic directions based on the findings.

Survey respondents and focus group participants represented a variety of library types and community sizes. Results showed that members are very aware of some RSA services and less aware of others. Respondents indicated wanting more information about the RSA services they are less aware of. While a majority of members reported being “engaged” or “somewhat engaged” with RSA services, members also indicated that time and travel constraints are primary factors influencing their level of engagement with RSA. Members want to be more involved and state that more in-person and online trainings would help facilitate greater engagement. While increased training opportunities emerged as a top request from members, overall membership is highly valued, and members are “satisfied” and “very satisfied” with the services they receive in relation to cost.

Considering the future challenges for RSA, members expressed concern around funding and stability of staffing for continued overall functionality of the system. Standardization and enforcement of policies is a top concern for members when considering the future of RSA and their patrons’ needs. Peer consortia were consulted and indicated that they face many of the same challenges faced by RSA.

Vision

Engaged, effective, and efficient resource sharing to empower strong libraries.

Prior to this strategic planning process, RSA did not have a formal vision statement. Rather, RSA’s vision stemmed from the desire to involve as many libraries as possible in the consortium. This planning process allowed the Board to think strategically about what they hope to achieve through this plan and the resulting vision clearly states their aspirational future.

Mission

Uniting member libraries to increase access to information and materials through resource sharing.

RSA’s previous mission described the work of the consortium in a lengthy, kitchen-sink sort of way. The Board crafted a new mission to briefly and concisely state the work of the consortium that will help achieve the above vision. The new mission states the “how” of RSA’s work and allows for members and future members to understand RSA’s function.

Strategic Directions

This plan is divided into three strategic focus areas:

Member Engagement
Organizational Effectiveness
Operating Efficiency

These strategic initiatives emerged during the planning process after review of the member survey and focus group data, meetings with the Board and staff, and discussions with the planning team.

Goals, Activities, and Evaluative Measures

The following pages summarize the strategic plan, followed by additional detail for each strategic direction. Included are goals, potential activities for each goal, and possible metrics. RSA staff will draft the activity plan that will serve as an implementation guide. Regular activity updates will be presented at future Board of Directors and Users Group meetings.

RSA_{NFP}

Resource Sharing Alliance NFP

2020-2023

VISION: Engaged, effective, and efficient resource sharing to empower strong libraries.

MISSION: Uniting member libraries to increase access to information and materials through resource sharing.

STRATEGIC DIRECTIONS



Member Engagement

RSA members understand engagement options and maximize engagement opportunities.



Organizational Effectiveness

RSA offers options for membership that suit the needs of our diverse membership and promote RSA self-sustainability.



Operating Efficiency

RSA maintains the staff and internal operations to support member needs aligned with our financial resources.

GOALS

- Inform and engage our members to maximize participation and cooperation.
- Communicate in a clear and comprehensive manner to strengthen and increase member relationships.
- Provide paths to leadership opportunities.

GOALS

- Investigate integrated library system (ILS) standardization opportunities to create efficiencies and cost savings.
- Design membership levels that fit member needs.
- Establish a pricing model that serves current members and attracts new participation.

GOALS

- Evaluate and adjust staff levels to meet member needs as we move towards RSA staff independence.
- Create training opportunities to equip members to best serve their patrons.
- Optimize appropriate facilities and technology to best serve our members.

Member Engagement

RSA members understand engagement options and maximize engagement opportunities.

Informing and engaging members is of primary importance to RSA’s overall success. At the heart of this engagement is communication with members about the availability of services and increased access for members regardless of location. Supporting peer coaching and leadership opportunities will be critical to increasing engagement.

Goals	Possible Activities
1) Inform and engage our members to maximize participation and cooperation.	<ul style="list-style-type: none"> • Create an engagement scale; • Assess current engagement; • Define minimum engagement levels for Public Library Union List, Basic Online and Full Online libraries and for School Libraries • Define engagement levels during the creation of new membership levels.
2) Communicate in a clear and comprehensive manner to strengthen and increase member relationships.	<ul style="list-style-type: none"> • Rework the RSA Support website; • Help libraries develop a peer consultant program; • Create a communications/engagement plan; • Increase online participation methods.
3) Provide paths to leadership opportunities.	<ul style="list-style-type: none"> • Peer consultant program expansion; • Create leadership succession model and consider term limits for RSA governance and committees; • Communicate and inform members about available leadership positions.

Potential Measures of Success

- | | |
|---|--|
| <ul style="list-style-type: none"> • Increased meeting attendance in person and online; • Increased committee attendance; • Increased online survey feedback; • Formalized peer consulting program; | <ul style="list-style-type: none"> • Increased member answers to RSA info requests; • Increased number of volunteers for committee chairs; • Successful update of by-laws; • Reduced basic knowledge questions asked of RSA staff. |
|---|--|

Organizational Effectiveness

RSA offers options for membership that suit the needs of our diverse membership and promote RSA self-sustainability.

Members highly value their partnership with RSA. Future membership models must meet RSA's members various budgets and technological needs while supporting the overall work and health of the consortia. Increased communication to encourage participation and standardization will improve efficiency for all levels of membership.

Goals	Possible Activities
1) Investigate integrated library system (ILS) standardization opportunities to create efficiencies and cost savings.	<ul style="list-style-type: none"> • Create Task Force to coordinate discussions and make recommendations on areas to standardize; • Standardized hold rules by item type RSA-wide; • Training/cataloging/reporting standards for all members.
2) Design membership levels that fit member needs.	<ul style="list-style-type: none"> • Create Task Force to establish library membership levels; • Define a set of standardized system modules, parameters, and reports to delivery an 'out of the box' system for the lower membership level or levels; • Define areas to standardize for mid-level membership tiers; • Create enforced norms for libraries that do not follow policies.
3) Establish a pricing model that serves current members and attracts new participation.	<ul style="list-style-type: none"> • Create Task Force to coordinate pricing model update; • Gather other consortia fee structures; • Gather relevant tax income, collection, budget, and other potential fee structure data; • Create multiple fee structures, create with RAILS support vs without RAILS support pricing; • Include RAILS grant/subsidy information on member invoices and during the normal budgeting cycle.

Potential Measures of Success

- | | |
|--|---|
| <ul style="list-style-type: none"> • Fee structure that provides a defined level of functionality for a minimum price; • Some standardized processes and procedures are established; | <ul style="list-style-type: none"> • Fee structure that increases overall revenue and maintains membership levels; • Number of members and number of new members; • Increased understanding of how RAILS grant funding figures into RSA fee structure. |
|--|---|

Operating Efficiency

RSA maintains the staff and internal operations to support member needs aligned with our financial resources.

RSA staff is integral to the work we do with our members on behalf of their communities. Increasing our staff to meet membership needs is critical to future success. Members indicate a strong desire for more online and in-library training. New training models will allow for better member access, involving both technology and member facilities to alleviate geographic disparities.

Goals	Possible Activities
1) Evaluate and adjust staff levels to meet member needs as we move towards RSA staff independence.	<ul style="list-style-type: none"> • Hire marketing/design/admin assistant; • Define need and area of expertise for 2 new staff members; • Plan for RSA staff independence from RAILS in 2023 or 2024.
2) Create training opportunities to equip members to best serve their patrons.	<ul style="list-style-type: none"> • Create Task Force to engage in deeper discussion about training needs; • Survey members to better understand training needs and preferences; • Consider options for online and on-demand training.
3) Optimize appropriate facilities and technology to best serve our members.	<ul style="list-style-type: none"> • Fully utilize RAILS and member library facilities to best support training, committee and governance, and other events; • Ensure RSA hardware/software/systems present the best set of features for price; • Reevaluate ILS systems in 2022/23 as part of exploring possible partnership/merger possibilities with other Illinois consortia.

Potential Measures of Success

- | | |
|--|---|
| <ul style="list-style-type: none"> • More staff to support a growing number of libraries; • More cataloging support to reflect member needs; • Evaluate RSA services to refocus existing staff on the most needed areas | <ul style="list-style-type: none"> • Smarter training, visit scheduling and meeting methods; • Use members to help other members whenever possible; • Report to Users Group about ILS system and partnership/merger possibilities. |
|--|---|

Next Steps

After this plan is adopted by the Board, RSA staff will complete an activity plan to guide implementation. Implementation will be an ongoing process, as the timing of certain activities is determined by several factors including priority and budget. We will review and adjust the activity plan on a regular basis.

Evaluation of the plan will progress strategically. Measurements for each goal will vary, and some activities will be best evaluated by soliciting input from members. Continued reporting of successes and challenges will ensure that we are transparent about our progress and open to member needs.

RSA commits to a comprehensive review and update of this plan prior to its completion. We intend that this plan will move us significantly forward and anticipate using this process as a best practice for maintaining momentum and an institutionalized way of operating. This plan is an investment in the future of RSA as an essential partner in the success of our member libraries and their communities.



Resource Sharing Alliance NFP Learning Report

Submitted by Amanda E. Standerfer, MA, MLIS

Assisted by Sarah Forbes, PhD

July 2019

Introduction

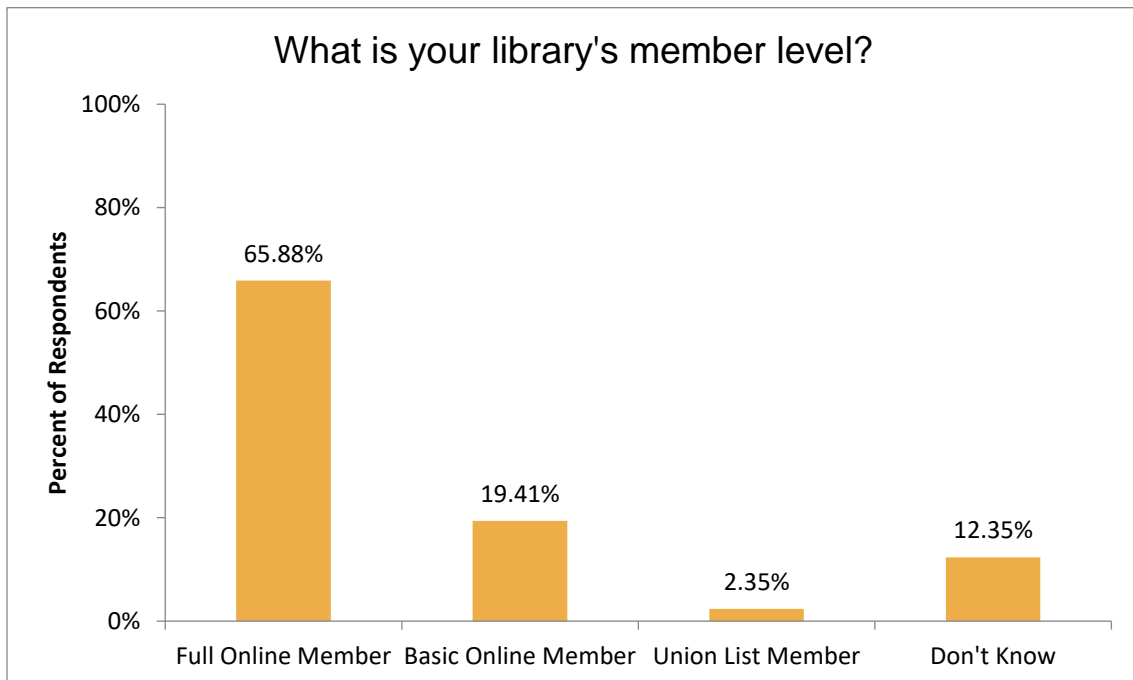
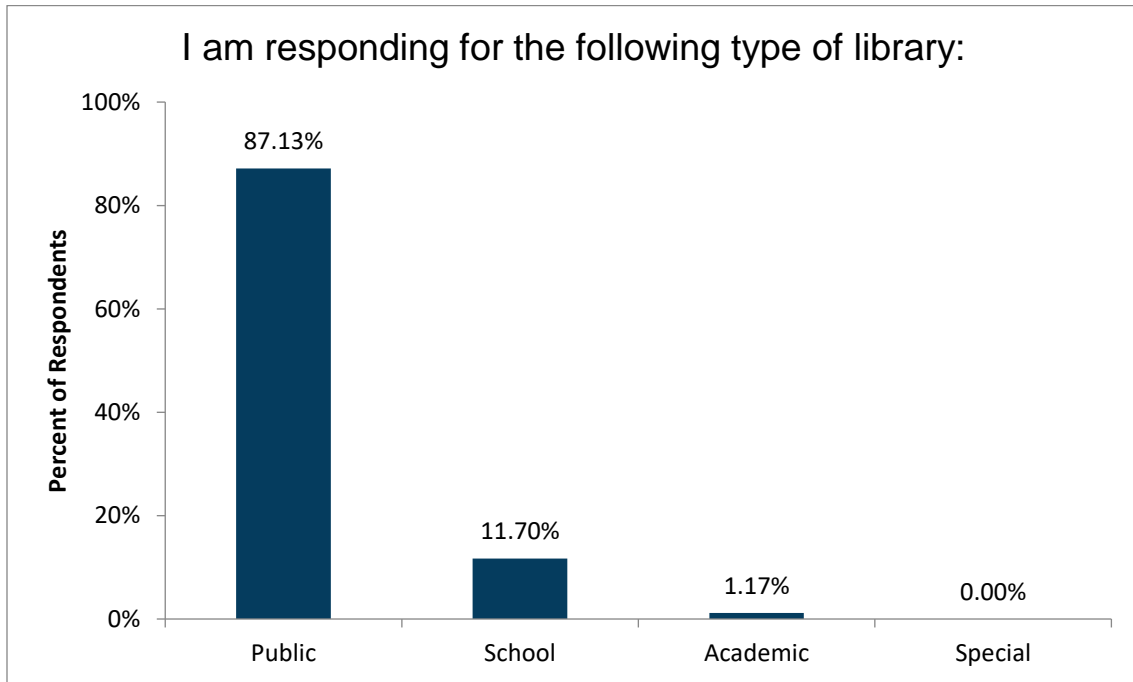
Resource Sharing Alliance NFP (RSA) initiated a strategic planning process in April 2019 to bring together member thoughts about key strategies going forward. The learning-focused, member-centric process started with a kick-off meeting with the Board to get initial input and design a Member Survey. Next, four focus groups were held in-person with virtual attendance options and interviews were conducted with ten RSA members and library consortia stakeholders.

The Member Survey asked member libraries to give input about awareness of, interest in, and satisfaction with various services; level of engagement with RSA; and concerns for the future. There were 172 responses to the survey.

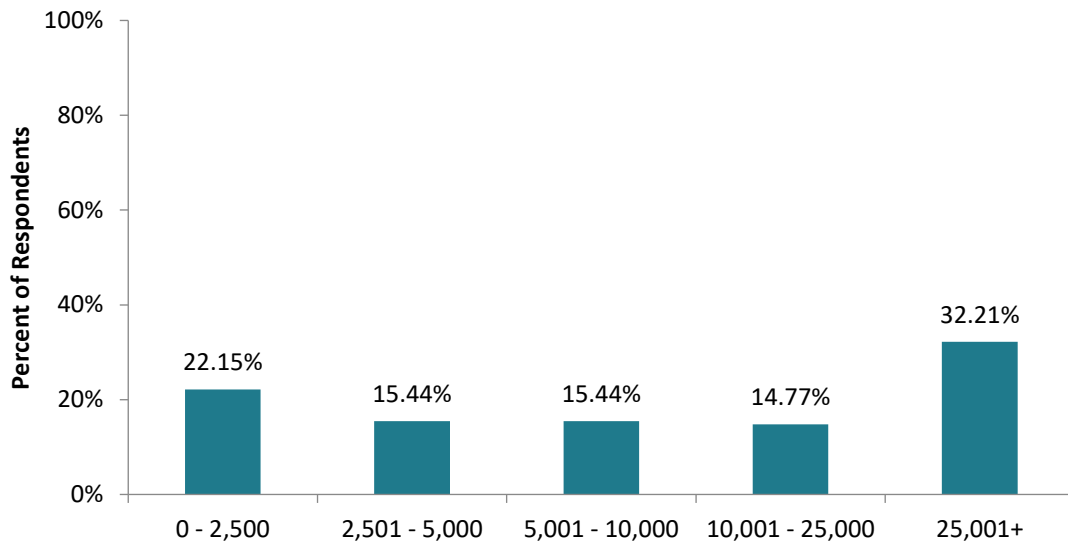
Focus groups and interviews dug into what's working for members, what they find frustrating, what issues need addressed in the strategic plan, challenges facing RSA and how to address them, and what would help increase member engagement.

This Learning Report summarizes all the information gathering to inform the process thus far. On August 1, RSA member libraries will gather at a Summit to discuss this report and build pieces of the strategic plan, which will be finalized by the Board by November.

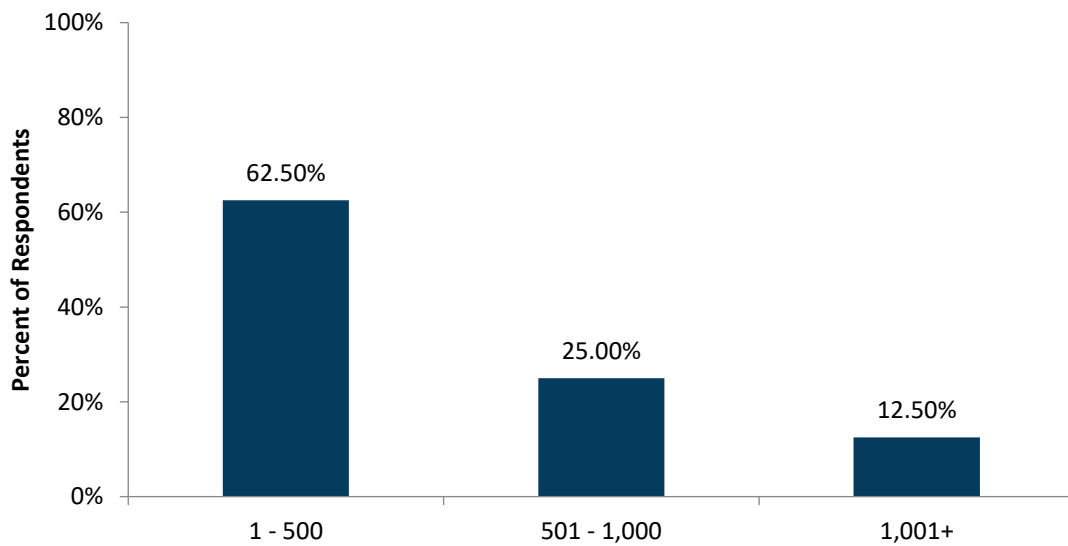
Respondent Profile

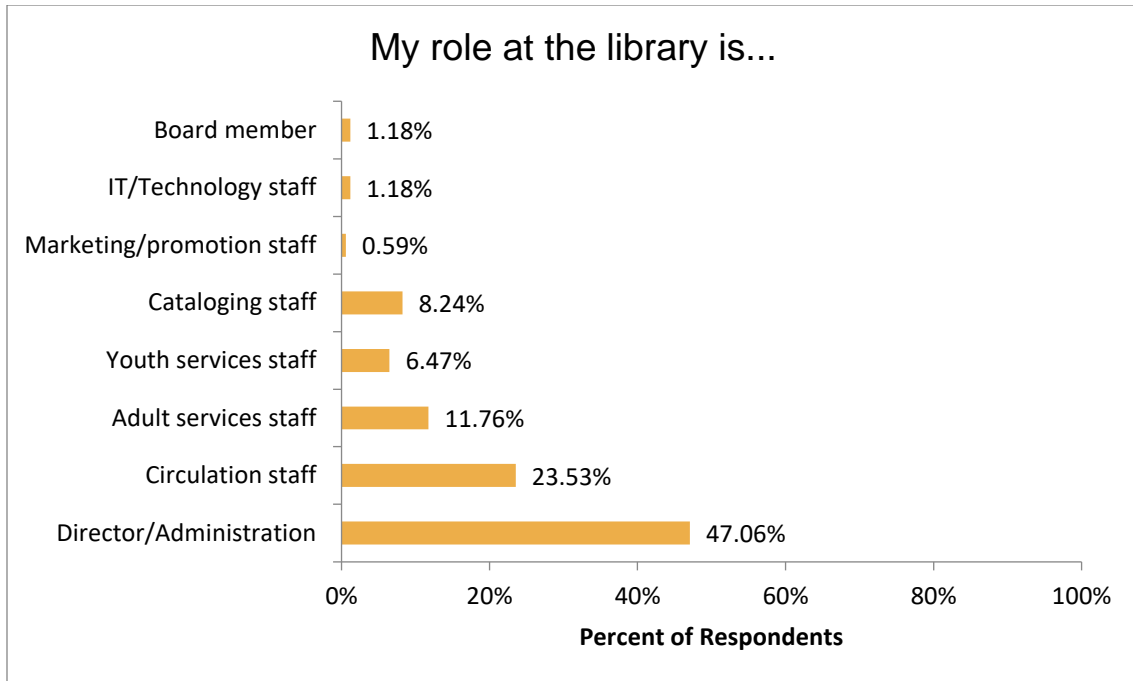


If you are responding for a public library, what is the population you serve?



If you are responding for a school library, what is the student population you serve?



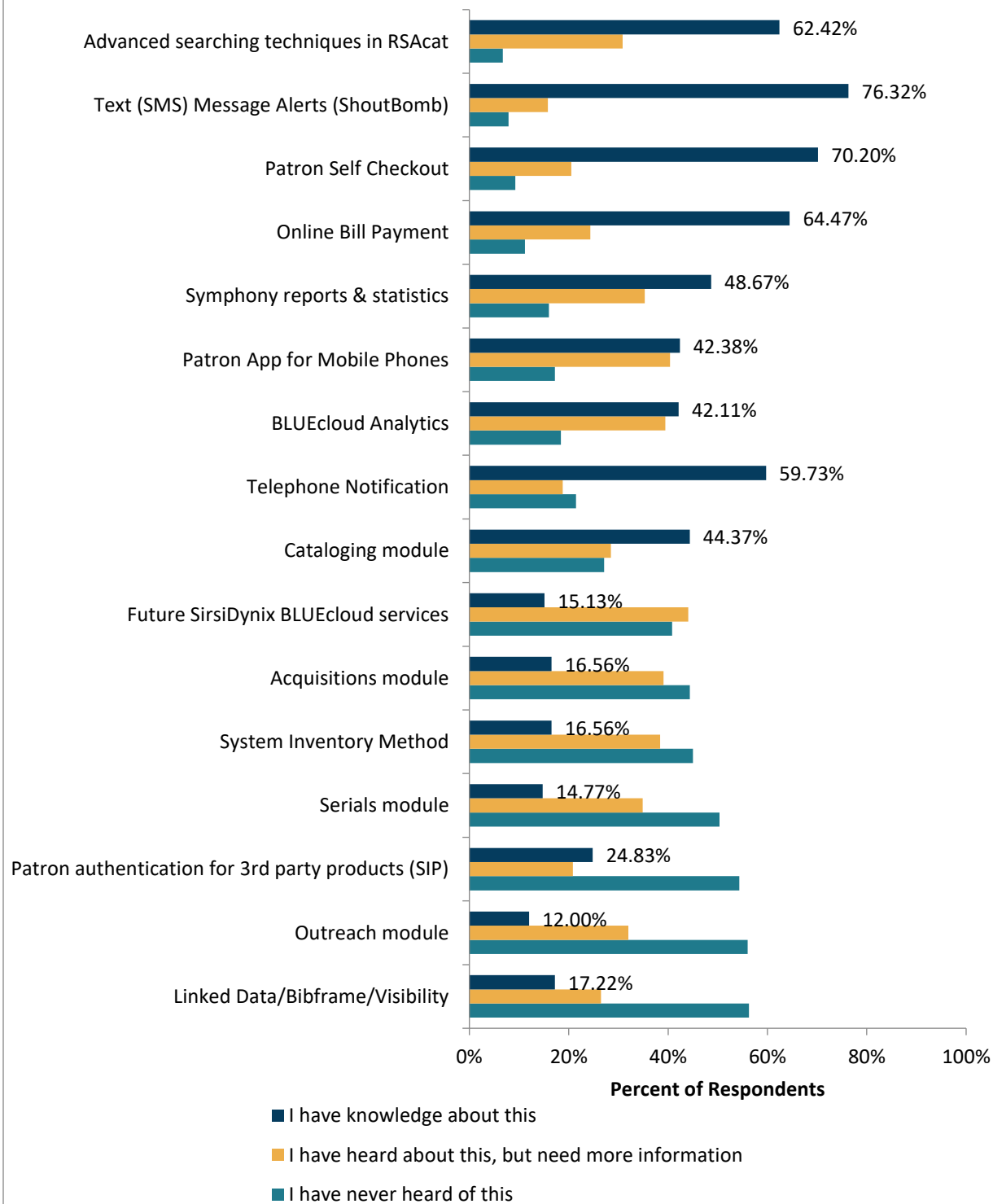


Findings

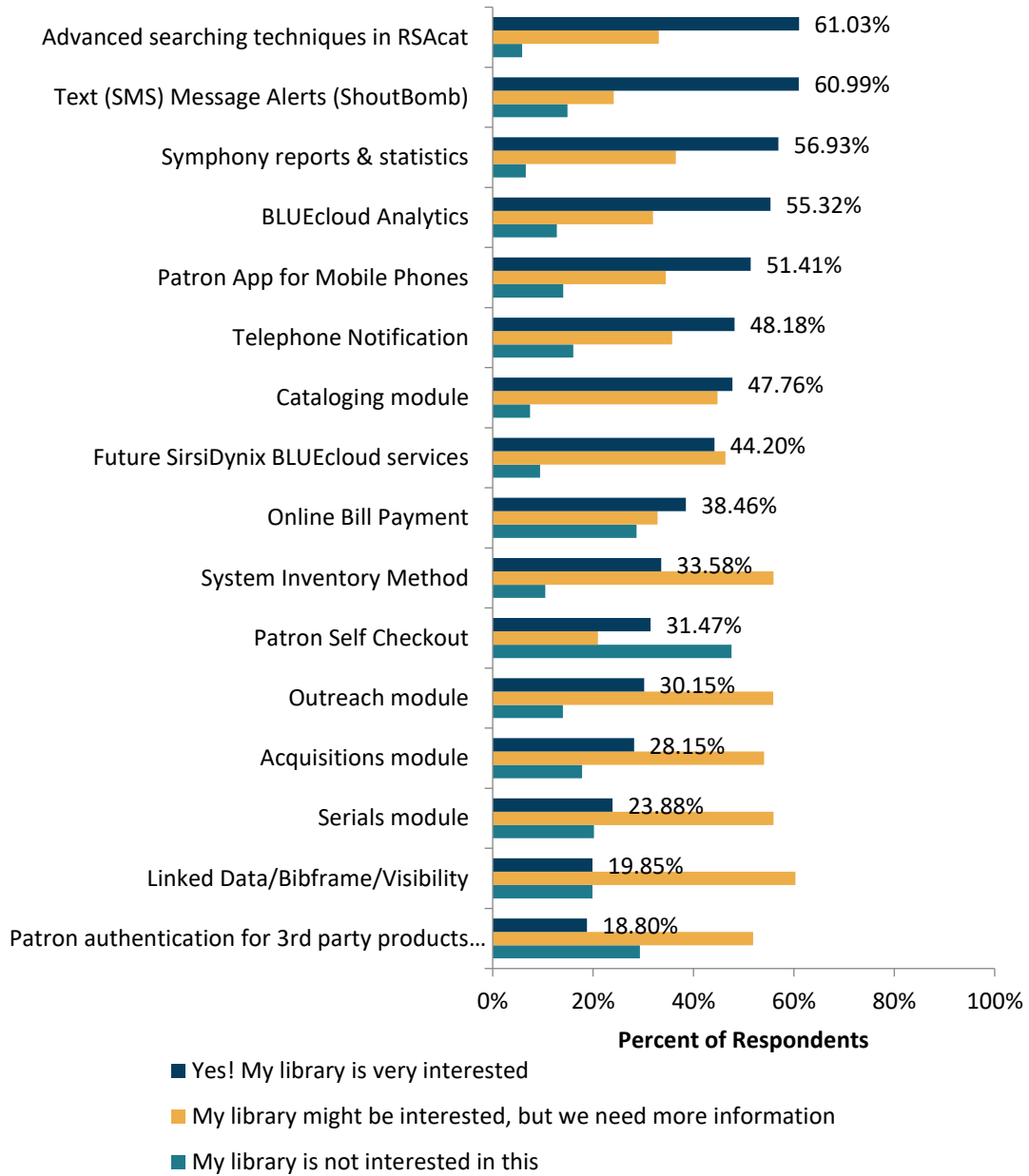
While a majority of the respondents are directors/administrators, from public libraries, and participating as a full online member of RSA, they represent a wide variety of library sizes.

Knowledge, Awareness, & Interest

Please indicate your knowledge of the below...



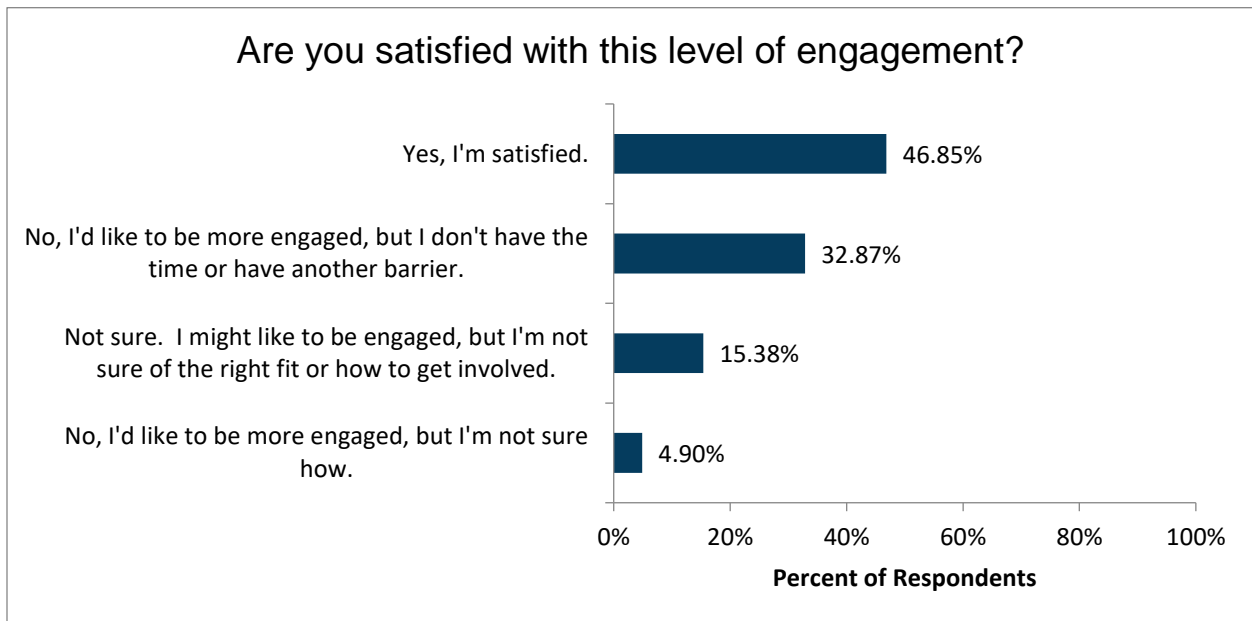
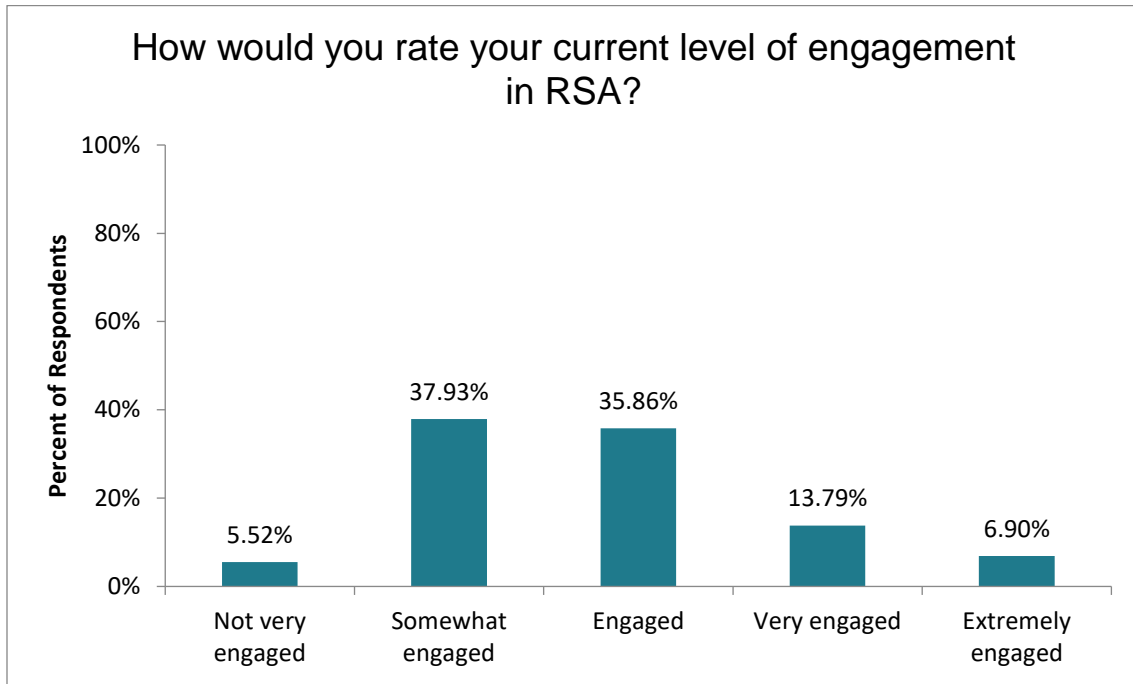
Please indicate your library's interest in the below...



Findings

Services that respondents are aware of are the services that respondents are the most interested in. Services they are not aware of, they would like more information.

Member Engagement



What keeps you from being more engaged?

- Lack of time, busyness
- Lack of staff to cover shifts if away from the library
- Lack of budget for travel expenses
- Working part-time
- Unaware of opportunities
- Timing of the opportunities (day of the week, time of day)
- Engagement opportunities are not viewed as worthwhile

Lack of time, demands of the library, and the distance needed to travel to meetings.

What would increase your level of engagement?

- Provide online videos/asynchronous training
- Provide staff coverage
- Provide time and money
- Increase awareness of opportunities
- Provide opportunities closer to member libraries
- Provide a variety of meeting times

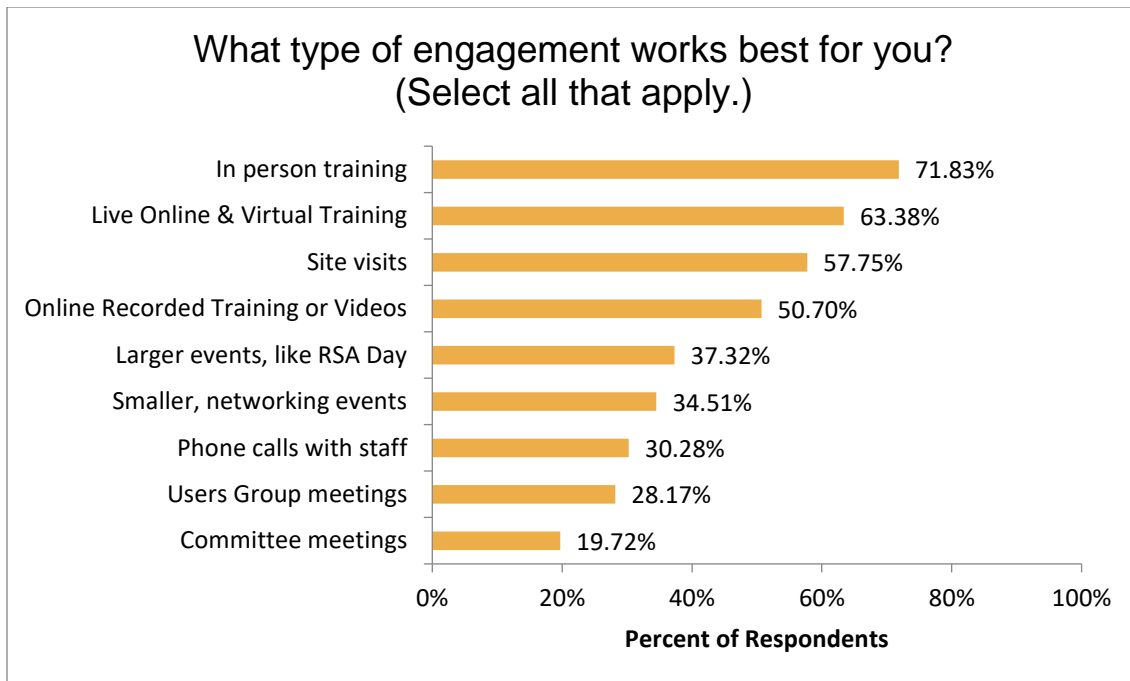
Online options and varying the days of the week on which meetings are held would help.

Bending the nature of time and space?

Being able to travel to training.

Having videos of the meeting to watch on my own time or notes of what goes on at each meeting. This way I can still stay current and hopefully give input on some things when possible.

RSA seems so far away. If I had more of a connection of the working of RSA and could be more involved with the staff, I would feel more engaged overall and would participate more. I also would like to be more engaged with other librarians in my area, but we are all too busy to find time to meet or too spread out.



What can we do to engage more members or more deeply connect to members already engaged?

- Provide onsite or online training
- Rotate the location of the engagement opportunities
- Develop a mentoring program
- Require attendance
- Promote the benefits

Findings A majority of respondents are engaged or somewhat engaged. Satisfaction with this level of engagement is split. The main barriers to engagement are time, money, and staffing. The data suggests that members would like more engagement to happen at their local library, through site visits or online training.

Rotate meeting dates and locations.

We need to impress upon new directors the value of RSA. I think both RSA staff and the current board should be involved in this effort.

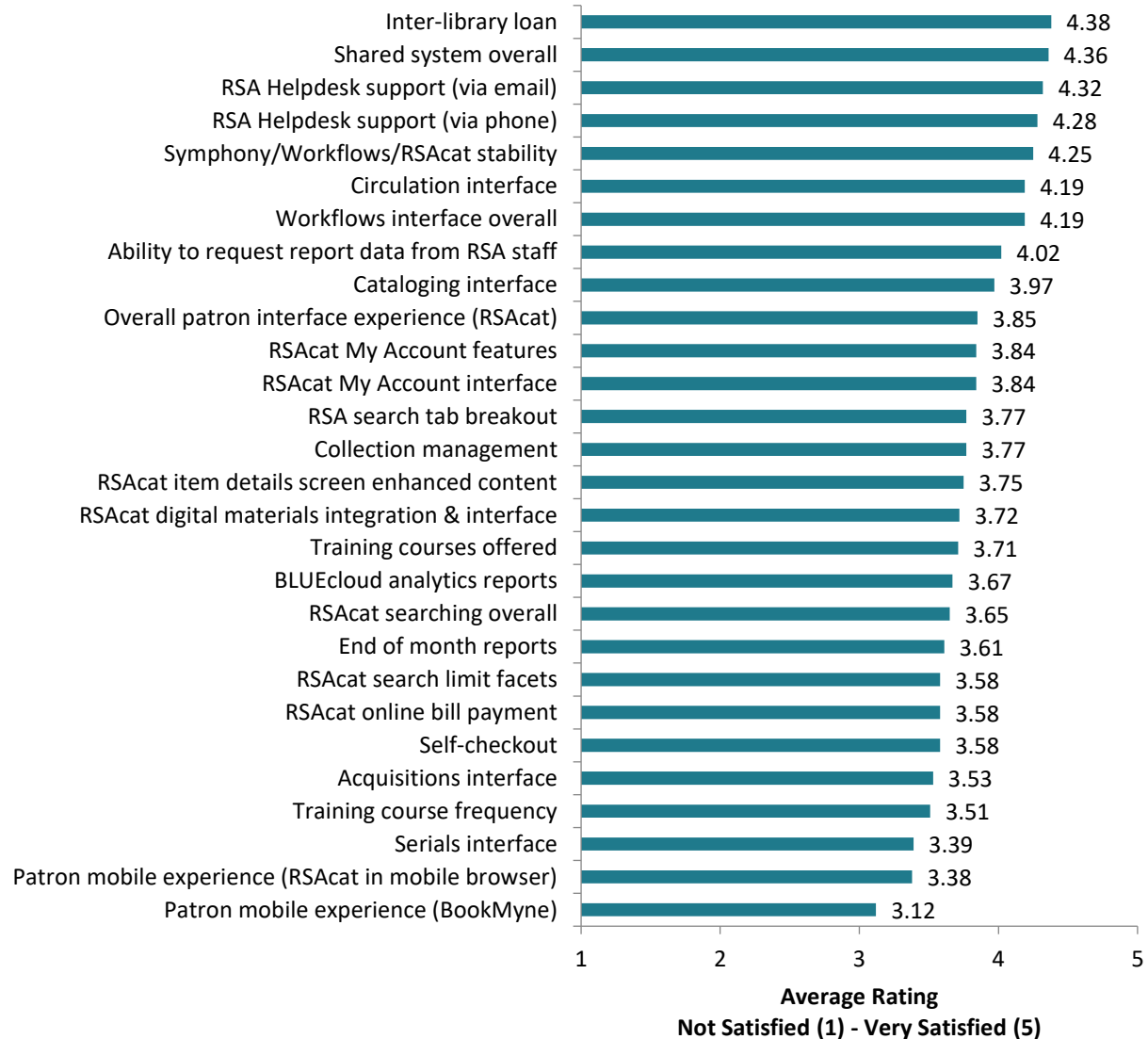
Perhaps come up with an inter-library mentoring system.

I think you have to personally ask members to attend events. It's much easier to defer a decision if the invite is from a mass email. I believe that you have to personally call members and express the importance of their engagement before inviting them.

Add more RSA staff and do more on-site trainings regularly.

Member Satisfaction and Value

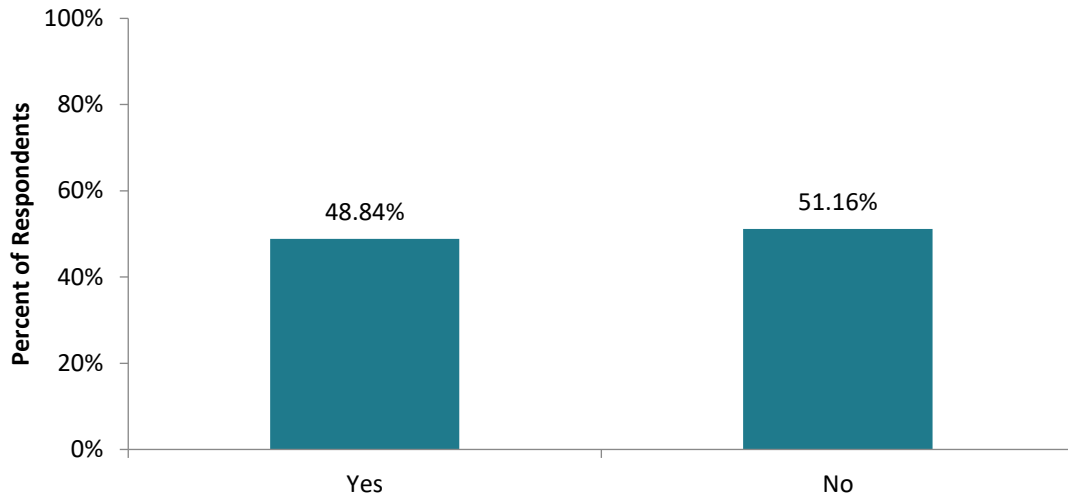
What is your current level of satisfaction with the following?



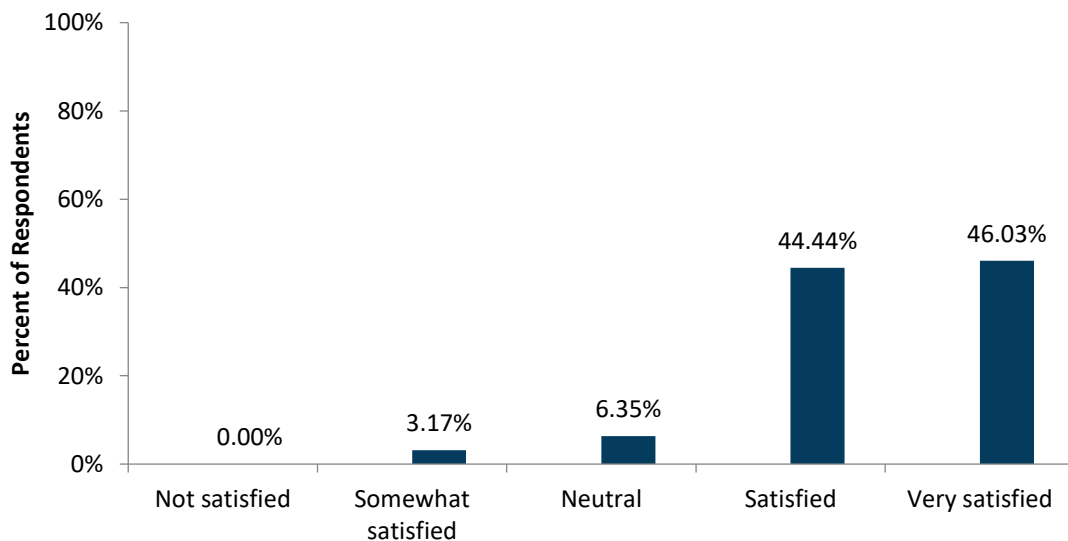
Any comments on your satisfaction ratings?

- Satisfied with: online bill pay, My Account features, and workflows
- Dissatisfied with (staff perspective): cataloging books, facets, lingo, inability to text book information to patrons, workflow instability, BlueCloud reports, and search tabs
- Dissatisfied with (patron perspective): BookMyne, RSACat, search engine, and book recommendations

Are you responsible for the library's budget and making decisions about how to spend the library's funds?

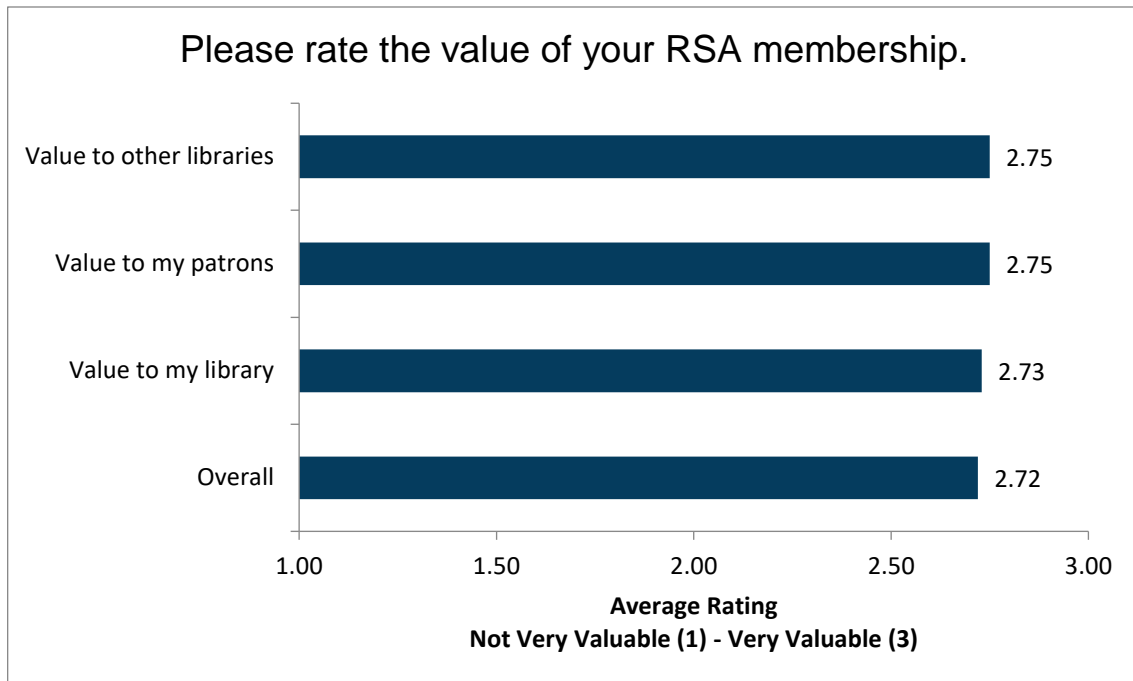


How satisfied are you with the services you receive from RSA for the cost?



What would raise your satisfaction level?

- Reduce costs and raise awareness of what's included in the price point
- Increase training opportunities and delivery methods
- Increase RSA staff and communication



Any comments on your value ratings?

- Easy to share resource with other libraries
- Affordable
- High level of support

What's the best thing about being a member of RSA?

- Interlibrary loan
- Training and support
- Online shared catalog
- Workflows

Findings

RSA members are satisfied with the services offered, more satisfied with interlibrary loans and the shared system; they are less satisfied with some of the patron experiences (e.g., RSCat in mobile browser and BookMyne).

RSA members are satisfied or very satisfied with the services they are receiving in relation to the cost. Satisfaction could increase if costs were reduced and training opportunities increased.

RSA membership is highly valued.

Future Focus

What do you think are the three most important things RSA needs to address in the next 3 years?

- Funding – fiscal responsibility of RSA, keeping member costs down, advocating for funding
- Training – continued, improved, standardized, self-paced, online
- Emerging technology – adaptive mobile app, keeping up with competition
- Keeping services up to date – workflows, catalog, website, analytics, database
- Member retention – engagement, membership levels, awareness of needs
- Fully staffing RSA
- Improved reporting
- Collection development
- Partnerships with other libraries and other systems
- Marketing – programs for patrons, awareness of library importance
- Efficiency of tasks

Tell us more about why those are your top concerns.

- Desire to serve patrons well
- Resources are limited
- Increase efficiency
- Desire to be knowledgeable about tasks, need training
- Reporting is burdensome and inconsistent
- Importance of staying up to date

What RSA's barriers to addressing your concerns?

- Budgets and costs
- Understaffed
- Time
- Being able to focus on different groups (small vs. large libraries, individual library needs vs consensus)
- Distance between RSA and member libraries creates a disconnect

What do you think RSA can do to overcome these barriers?

- Rethink training opportunities – expand topics, deliver online, train other member librarians to help provide knowledge
- RSA organization – develop and enforce policies, rethink levels of service provided, set goals, provide personal communication
- RSA membership – expand to other libraries, require some level of engagement
- Support member libraries – member driven committees, mentoring programs, library promotional materials
- Increase RSA resources – funding, staffing

Findings

RSA members are concerned about funding and being able to provide quality services to their patrons (via increasing knowledge through training, keeping services up to date, etc.).

What excites you about the future of RSA? Why is that exciting?

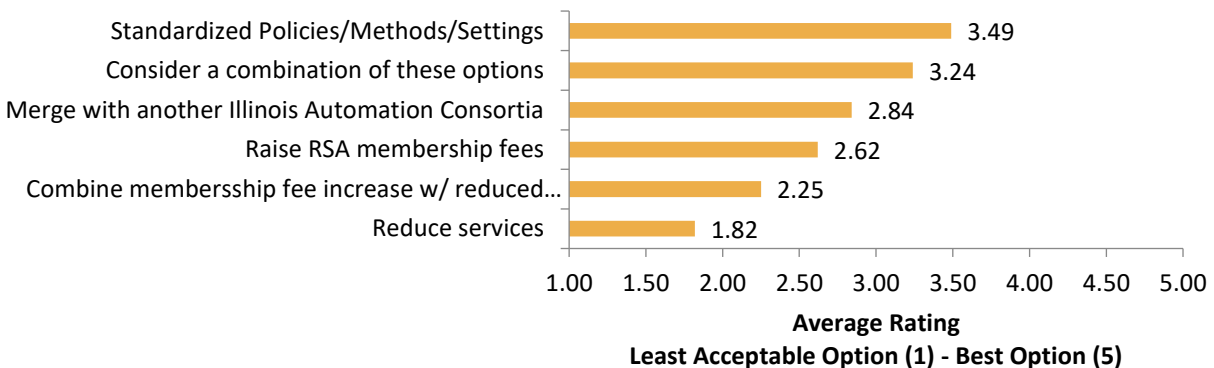
- Forward thinking and innovative
- Use of technology
- Customer service
- Borrow books from all over the country
- Financial stability
- Mobile app

Patrons have more access now than ever. Communication and working together. RSA staff is always willing to help.

What frustrates you about RSA?

- Too much focus on certain libraries (small, large)
- Location, distance from member libraries
- Lack of policy enforcement
- Taking away library autonomy
- Lack of member engagement
- Certain processes – reports, searching, recording returns
- Turnover in personnel

If RSA were forced to make changes due to budget cuts or other unforeseen circumstances, please rate how you feel about the below options the Board should consider to keep RSA operating.



Are there other options the Board should consider if changes were required?

- Standardization
- Keep membership costs the same or develop a pay-per-feature model
- Delivery system – do not reduce services
- Leverage bigger libraries with more resources to help with RSA services
- Train the trainer
- Prioritize based on mission and/or core services

Findings

Responding RSA members are most interesting in considering options for standardizing policies if changes were needed due to budget cuts or other unforeseen circumstances. Respondents also indicated that a combination of options should be considered if changes are needed.

Final Thoughts

What additional input do you have into RSA strategic planning process that we have not already captured?

- Focus on long term sustainability
- Establish a mentoring program between libraries
- Raise awareness of services
- Increase engagement – rotate meeting locations, rotate days of the week, require training for all new directors

Focus Groups & Interviews

Focus group and interview participants expressed many of the same comments as survey respondents. When asked about what is working well, most talked about resource sharing and the spirit of cooperation. Staff abilities and responsiveness was also often cited along with delivery and the lack of downtime.

When asked about frustrations, participants indicated that the website is sometimes difficult to navigate. Most groups also expressed frustration with the lack of enforcement about certain policies and a desire to give incentives for those libraries following policies or developing a system to deter members from ignoring policies.

When asked about top issues to address in the strategic plan, the following topics were raised:

- Training (more options, virtual, in-person)
- Engagement (making sure libraries are knowledgeable about RSA and participate in its governance)

- Stable budget
- Staffing levels (to effectively maintain the database and engage with members)
- Physical location of offices
- Functionality of the system (reporting, ease of use, searching, standardization, etc.)

Funding was the most often mentioned challenge, along with limited staff. The geographic size of the system along with challenges of the different types of libraries was also discussed and how to remain cohesive with so much diversity. Many participants expressed desire in a mentoring-type program to help new or smaller libraries stay current on everything related to RSA.

Some participants cited communication as a strength and a challenge. Many expressed appreciation for the amount of communication from RSA, while others suggested that having “levels” of importance in communication would help direct smaller libraries with less time to pay attention to RSA a way to filter all the messages.

Other ways to engage members mention include rotating the dates and location of meetings and continuing to offer online participation options. Many participants said that time and geography were the biggest barriers to engagement. Participants gave praise for RSA Day and the opportunity for learning and networking. Continuing to think of creative ways to provide training, including on-demand or other virtual options, is also of interest to members.

Several interview participants expressed interest in becoming more involved with RSA leadership, but were not sure how to take steps that would lead to increased engagement. A couple of focus group attendees also expressed confusion about RSA’s governance structure and how to become more involved.

Finally, when talking to peer consortia, many similar issues were raised, including engagement and training. Making the most of member time is a challenge and getting members to travel to events can be prohibitive. Peer consortia have also struggled with funding models and provided reflections on their processes to develop new models.