

Board Input Draft 1 – 2024-11-03

The RSA Directors Advisory Committee (DAC) asks members to participate in surveys from time to time as they gather information about various issues, programs, or enhancement areas. The DAC's primary purpose is to gather feedback, present plans, policy updates, provide strategic plan ideas, and generally comment on the operations of RSA. This Committee is the primary feedback mechanism for Directors of RSA libraries to share with the RSA Board. The DAC meets on a quarterly basis and is open for in person or online attendance by all RSA Directors. The next DAC meeting is 12 March 2025, at the Peoria Public Library Main Street Branch from 1 – 3 PM. All Directors are welcome to attend!

The survey is anonymous and is designed to share your thoughts on the overall RSA organization. If you'd like an answer to any questions or issues you entered in the survey, you can include your contact details. Otherwise, there is no need to enter your contact data. All data will be aggregated and summarized for review and evaluation. The survey will be open through the end of January. Thank you.

General thoughts on the entirety of RSA. This includes everything RSA related including our Members, the Support Staff, and the system.

- 1) What is the best thing about RSA? If different from the best thing, what is your favorite thing about RSA?
- 2) What is RSA good at?
- 3) What are your top RSA concerns? Of these, what is your #1 RSA concern?
- 4) How could RSA (the organization) better support or help your library?
- 5) What is your favorite way the RSA membership supports each other? Think membership interactions rather than system features like holds.
- 6) How could the RSA membership better support each other?
- 7) What RSA services, features, products, governance, rules, etc. do you wish you knew more about?

Training and Standardizations questions

- 1) What training needs for RSA products and services do you need or wish to see?
- 2) What type of training do you prefer (Zoom/in person/recorded videos/printed materials)
- 3) Where should RSA start the standardized next?
- 4) What are your top concerns with standardization?
- 5) If you could pick the next area RSA should try to standardize, what would it be? Assume standards would be designed to meet the needs of Public libraries, with potentially different rules for non-Public libraries.
 - a. List out several potential areas to standardize and allow survey responders to select 2 or 3 – include text box for further inputs

Your ideas for the future of RSA

- 1) How could RSA's Board, the Directors Advisory Committee, RSA Support Staff, or the Membership help you succeed in your library?
- 2) What can RSA as an organization do to help you with your Board or Administration?
- 3) How can we build a stronger RSA member to member support system?
- 4) What are your expectations of the RSA Board, RSA Support Staff, and other RSA Members? Note: we are looking to create some expectations documents that outline our shared expectations and will incorporate your inputs to the drafts.
- 5) Would you be interested in some type of formal or informal library staff visiting other libraries program? Would you like a library passport type program where patrons or library staff who visit other libraries could get stamps from each library they visit?
- 6) RSA will be doing an environmental scan and review of the available library automation software options in 2026. Would you be interested in attending in person 'show and tell' events from vendors? Would you attend Zoom options for these events? Would you be interested in joining a working group to review the available options? How much better would a new system need to be for your library to want to go through a system migration?

DAC Direction. The DAC is new and still creating its identity, you can help with this.

- What projects or issues would you like to see the DAC discuss?
- How can the DAC increase participation by guests both in person and via Zoom?
- Should the DAC setup a review schedule for RSA Policies? If so, would you be willing to help with the review and potential update process? It would make sense to review all the policies for a particular area of system operations in bulk.

Is RSA right for my library?



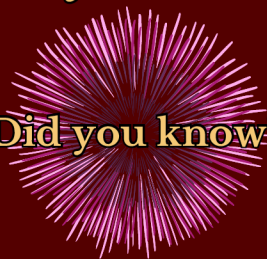
Who is RSA?

RSA stands for the Resource Sharing Alliance.

We are a multi-type library automation consortium dedicated to resource sharing.

We provide shared ILS services to libraries in central and west central Illinois.

Did you know?



Joining RSA means joining the larger library community.

Massively expand your collection via access to the nearly 4.1 million items within our shared database. Data shows that 66.52% of RSA patron holds are filled by items owned by other libraries.

All functions of our ILS are available to all RSA members.

Financial insights



Financial assistance to join is available. RAILS offers a Catalog Membership Grant to help fund the one-time startup costs for any RAILS member library that is not currently an LLSAP member.

RSA can provide your library with exact annual membership pricing for the next four years.

Interested in statistics from similar sized RSA libraries? Reach out for details!

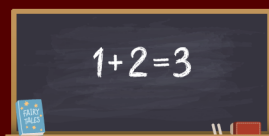
We serve 135 member libraries



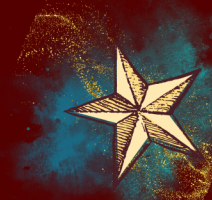
3 academic libraries



96 public libraries



34 school libraries



2 specialized libraries

Snapshot of services

RSA governance leadership opportunities.

Centralized cataloging service which provides extensive cataloging, database editing, and clean-up support.

Free up staff time with RSA's online catalog and app which allows patrons to easily view items and place system-wide holds on over 90% of all consortia holdings.

Access to numerous statistical reports to support data-driven decision making, plus ability to request extra or custom reports.

Timely automation system troubleshooting assistance.

Group e-book purchases, access to 55+ million online articles, and more.

In-person and online training opportunities through workshops and library visits.

Spaces for member-to-member engagement and networking.

Detailed documentation and guidance for interacting with the shared ILS.

Ready for more?

If you're ready to take advantage of resource sharing, increase your value to the tax payer, and create a better experience for your patrons and staff, contact RSA today.

help@rsanfp.org | 866-940-4083





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

26 November 2024

Subject: Resource Sharing Alliance Patron Notes Policy

Patron Notes:

1. 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:
8-16-18 (BODY OF NOTE) MT/WASHINGTON PL
2. Notes should contain factual non-bias information.
3. All libraries are to remove unnecessary notes on their patron's accounts.
4. If the note contains nonvital information, such as update email, please put REMOVE NOTE or PLEASE DELETE WHEN UPDATED. Whoever completes that task may then remove the note, regardless of library. Important information like information about damage should be left until the person who created the note is informed.

Approved by the RSA NFP User Group on 1 March 2012

Revised December 2012

Approved with Revisions by the RSA Board of Directors XXXX



26 November 2024

Subject: Damaged Materials from Other Member Libraries 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.

Item received damaged at checkout library

1. Any time an item is received with damage, create a CIRCNOTE in the item record in Workflows and attach a 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 note.
4. If the damaged item may pose a health risk or biohazard, please note the Item ID and owning library, contact the item owning library, then dispose of the item according to the item owning library's wishes and take the next steps in billing the patron.

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. This is done because the returning library is the one with the current

relationship with that patron. However, they need to speak to the item owning library to see about processing fees and if they wish to bill for damage.

3. The item-owning library has final determination regarding damage.
4. Once it is determined that a patron will be billed, mark the item as Lost using the Mark Item Lost wizard. Some libraries allow patrons to keep damaged material. When payment is sent to the item owning library it needs to include the Item ID so that library can delete that record.

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

Approved by the RSA Board of Directors XXXXXX

Additional Information


How to add a CIRCNOTE to a damaged item:

If the item is checked out, go to Display User and open the user. Go to the CheckOut tab, find the item and right click on Edit Item Note.

Summary Addresses Extended Info Bills **Checkouts** Holds Routings Suspension Charge History User Groups

Checkouts:1(\$0.00)

Title	Call number	Item ID	Date Charged	Date Due	Recall Date Due	Status	Type
Sociopath : a ...	BIOG GAG	A66700604877	11/12/2024,19:...	12/3/2024,23:59			BOOK



- Bill User for Item
- Change Item ID
- Claims Returned
- Discharge
- Display Holds
- Display Item
- Edit Item Note**
- Mark Item Lost
- Mark Item Missing
- Modify Due Date
- Place Hold
- Renew As Seen
- Renew As Unseen

Retention Schedule for Expired Patron Cards Policy

9 August 2023

- 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.
- Patrons known to be deceased with lost material or bills should be deleted 6 months after the library becomes aware of their passing.

*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