

## Executive Director Report for 6 February 2025

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

### *Membership Updates: Ongoing Topics & One-Offs*

#### **Withdrawing Members for FY26**

- ROWVA CUSD & East Peoria High School – both have given formal notice of withdrawal
- *A-C Central, Quincy Notre Dame, and Stark County Schools – none have given notice, this is our hunch based on conversations (Stark County requested a database export, which is consistent with moving to standalone system.)*

#### **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.
- Hamilton Public Library – Did not apply for RAILS Automation grant on 1 Nov
- Camp Point Public Library is interested in joining RSA.
- 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 slowly cataloging collection for some time
- Provided patron entry and some circulation training in September. Will go live without entire collection cataloged. They'll make temp records for items not in system, then enter then on return.
- *Awaiting their receipt of patron barcodes and training for their new staff member who will be doing cataloging.*

Bushnell-Prairie City CUSD #170 (former Union List) – Not automated in RSA

- We have spoken with the school librarian, who didn't know the future
- *Upcoming Parameters Party should provide some clarity on their membership status*

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.

- *Upcoming Parameters Party should provide some clarity on their membership status*

### *RIP Updates: Ongoing Topics & One-Offs*

List of the major RSA Indi Project (RIP) to-do's RSA Administration needs to complete in FY25.

#### **Timeline & Punch List**

- Build the overall timeline and topical punch list for the staff employment process. *HR Fit's working on timeline and implementation.*

### **IMRF (Illinois Municipal Retirement Fund)**

- IMRF legal has started a pre-review to determine membership suitability. Had several contacts in January. Currently awaiting their guidance on the formal application form and the amount of the check we need to give them for the financial suitability review.
- Due to the tight timelines involved, we are dual-tracking IMRF entry AND an 'in-between' 401K set aside for employees to buy back missed time if IMRF is not ready on 1 July.

### **LIMRiCC**

- We've been granted permission to join LIMRiCC. 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.
- RSA staff currently use PPO and HDHP (high deductible) plans
- RAILS provided the 3<sup>rd</sup> party plans they use in conjunction with the LIMRiCC coverage.

### **Mission Square**

- We have large package of paperwork to fill out to get RSA setup.
- Will start standard plans package and the 'in-between' set aside for IMRF setup in Feb.

### **Payroll & Other Benefits**

- RAILS provides our payroll and has a very generous overall benefits package to help them attract staffing in the Chicago area. Our final benefits package will be different and more tailored to our smaller needs. RSA is smaller, staff-wise, than many RSA Member libraries.
- HR Fit will provide ongoing HR functions after we hire staff.

### **Staff Handbook & Staff Policies**

- We have taken the best bits from the RAILS handbook, other Illinois automation consortia, and several RSA and non-RSA libraries and combined them into a draft.
- Draft 1 completed and sent to HR Fit for their initial review.
- We have also sent all applicable current RSA or RAILS policies for their initial review.

### **Staff Pay Scale**

- We created a 7 level pay scale with relatively wide pay bands. This is based on the RAILS pay scale which was just benchmarked and adjusted in 2024.

### **Job Descriptions**

- All RSA job descriptions need reworked to reflect RSA's new operations and remove RAILS legacy items.
- We have created drafts of job descriptions for Specialist, Coordinator, Consultant position for Bibliographic Services, Operations, and User Experience and Operations (no specialist level). Plus each departments Manager.
- Still in process are the Office/Business Manager/Administrator position and the System Administrator/Data Analyst position. The Off/Bus position should start July 2025, the SA/DA is targeted for July 2026.
- HR Fit will help develop and review all job descriptions.
- We intend these descriptions to cover all anticipated RSA needs for the next several years. Not all positions will have a corresponding staff member employed in them.

## Computers, Software, IT Infrastructure

- RSA Support Staff can't migrate off RAILS provided systems until the staff cutover.
- Have initial IT 360 proposal for IT support and an Office 365 setup and migration from RAILS Office 365. The result of this proposal was a rethink on how we provide library emails due to the price.
- RSA staff are getting quotes from several addition outside IT consultants for MS Office and other infrastructure with the newer service levels.
- RSA is close to deciding on a new email replacement to provide one email per library as a replacement to the RSA Gmail accounts. We have identified an inexpensive web-based alternative for this that other consortia outside the state are happy with.
- We plan to move staff to RSA's email domain, librariesofrsa.org, on 1 July 2025 to coincide with the employment change. Even with the new round of proposal gathering, this is still the plan
- Zoom, telephones, laptops, printers, and everything else RSA Staff use to do their job will be moved to RSA owned accounts as it makes sense to do so. We can continue to utilize some RAILS IT infrastructure through June 2026. Working with RAILS now to decide what RAILS will sell to RSA, what they need back from RSA and timelines for both.

## Consulting & Contracts

- HR Fit is expected to continue as our HR 'department' post staffing transition.
- SirsiDynix: The current contract ends in Feb.
  - We have agreed on a pricing structure, annual contract increase, and length of initial and extended contract terms.
  - All current services remain in the new/updated/extended contract
  - SirsiDynix was sold by the old investing firm to Harris Computer on 24 Dec 2024. This caused significant delay in getting out final contract terms.
  - Will bring the final contract paperwork to the Board when it is available for approval.

## 501(c)(3) Conversion to Illinois Intergovernmental Instrumentality 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.
- The lawyers are awaiting instruction for the IL SOS office as to what additional things they need to file. The paperwork for the IRS to update our status is ongoing.

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

A running list of major projects *which patrons see, will see, or are affected by directly*. Other project are reported in Departmental reports or the Administrative section later.

### RSAcac Mobile 2

We are still working with SirsiDynix to set up a testing instance of RAcac Mobile 2 (SirsiDynix's BLUEcloud Mobile 2). This new app will allow us to give each library a more personalized header and possibly local links and more. We are currently doing battle with Dun and Bradstreet to get some information from them that will allow us to verify our Google Play Store vendor account. No progress over the holiday break with D&B or Google. Many consortia/libraries are having the same verification issues.

We do have the Apple app store beta program up and running and we have begun looking at the new, in testing, version. We will be providing SirsiDynix feedback on issues as we find them. I can send you the TestFlight link if you'd like to install the early version on your Apple device. This is NOT for public or wide-spread deployment. This is a test version and not ready for prime time. **No updates for January.**

### **RSAcac Header Name/Logo Updates**

As part of the RSAcac 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 RSAcac profile header name, logo, and colors. We will use those requests to match, as well as we are able, the RSAcac Mobile 2 'skin' for each library. No updates until we have RSAcac Mobile 2 to review, so we know what to ask for. **On hold until later in the year when things calm down for RSA staff.**

### **RSAcac Online Payments**

RSAcac and RSAcac Mobile both can allow online bill pay. RSAcac currently has 24 online bill pay libraries, all those who requested it. This was previously a Full Online only feature. RSAcac 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 RSAcac profile. **Also, on hold for staffing issues.**

### **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 RSAcac 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. **No updates for January.**

## ***Staff Updates Since the Previous Meeting***

### **Staff Anniversaries**

- Erin Roberts – 3 years in February

### **Misc Staffing Notes**

- Tony Hahn is on leave/vacation through mid-March.
- Starting Wednesday Feb 19<sup>th</sup>, all RSA staff will work in-office each Wednesday.
  - Operations will work Mon – Wed in office
  - Cataloging will work Wed – Fri in office
  - All supervisors work 4 or 5 days a week in office

### **The Expectations Project, RSA Staff Edition**

On hold pending completion of 1) Board/Dac Expectations documents and 2) Indi-RSA staff handbook and policies. Will reconvene to see what else we need at that time. May work up addition intra-staff and staff-to-member expectations.

## ***Administrative Projects and Updates Since the Previous Meeting***

A running list of major projects not involving patrons directly or other updates from Administration.

### **The Expectations Project**

On hold due to independence work. Will present latest versions at the March DAC meeting.

### **Outreach Campaigns**

- Bug Us Campaign
  - The Operations Department's 'Bug Us' materials have been shipped and electronic versions sent via the email forums.
  - The DAC has requested 'Bug Us' business cards that are like the Board cards. They selected a Cricket as their bug. The Bug Us team will work up a design for their approval.
  - Reports will have a Bug Us campaign in April. This will be the last campaign for FY25.
- 'Focus on the Forums' email campaign to introduce individual email forums and their general subject matter is ongoing and will continue with other forums in February.
- RSA Day 2025. RSA will have staff available for drop-in or scheduled Q&A all day. We will have at least one Cataloger and one Operations Department staff available to chat with attendees. Emails with a link to a signup form continue to be sent via the email forums.

### **BLUEcloud Central Backend Refresh and Cleaning**

Working with SirsiDynix staff to cleanup, correct, and update the BLUEcloud online system databases. BC Central sits between our Symphony server and RSAcat, RSAcat Mobile, many products integrated into those like online payments and eBooks, and more. It is also what hosts the online Circulation, Cataloging, and Acquisitions modules. We'd like to roll out online Circulation in late spring and start testing with a couple schools and publics then. This will require a conversion to individual Workflows logins as well for all non-cataloging functions. The online Cataloging module may be appropriate for libraries that only copy catalog, but that's a project for later. Online Acquisitions is still in development.

There is a TON of work and learning RSA staff need to do just to clean up 15 years of alpha and beta testing cruft in that system. RSA was the first consortia setup in BLUEcloud a long, long time ago, even before they had written the documentation. Our setup has been used for testing just about every new and proposed product over the years leading to a mess of half implemented features, former features, reworked and redone features, and guesses as to features or settings might be needed for future capabilities. Now we need to clean all that up, remove as much of the 'junk' in there as possible while not messing with literally thousands of search limits and settings for the mobile app and online payments. Several RSA staff members are attending Zoom trainings for administering this.

### **BLUEcloud Analytics Training, Users, and New Dashboards**

We held the first BCA training in almost of year in January. As the only person who can do this, I recorded the training and Q&A sections as separate videos, and uploaded them to YouTube. Both are linked on the BCA page of the Support Site along with a rewritten BCA User Reference Guide, and 2 new interactive dashboards. The BCA support site page was reworked to reorganize the

information to flow better, with the interactive dashboard links moved to the bottom on the page and the navigation sidebar was cleanup up to make it easier to use.

### ***Completed RSA Events: Training & Visits***

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

#### **January Events:**

<b>Location</b>	<b>Campaign Name</b>	<b>Campaign Type</b>
RSA Office	FY25 January 2025 Board Meeting	Governance
Chillicothe PLD	FY25 New Director Visit	Member Services
Bradford CUSD	Parameter Party	Member Services
Zoom	Online Basic WorkFlows Cataloging Workshop	Cataloging
Zoom	RSA Basic Circulation Workshop	Member Services
Midwest Central Schools	Parameter Party	Member Services
Zoom	FY25 Holds Workshop	Member Services
Blandinsville-Hire Library District	Cataloging Site Visit	Cataloging
Mt. Hope Funks Grove Townships Public Library District	Cataloging Site Visit	Cataloging
IVC High School	Parameter Party	Member Services
Zoom	BLUEcloud Analytics Training and Q&A session	Reports
IVC South Elementary	Parameter Party	Member Services
Fulton County Schools	Parameter Party	Member Services
IVC Mossville Grade School	Parameter Party	Member Services
IVC Chillicothe Elementary Center	Parameter Party	Member Services
Zoom	Policy Brainstorm Session	Member Services
Dee-Mac High School	Parameter Party	Member Services
Zoom	RSA Cataloging Chat	Cataloging

## Cataloging Department Report for 6 February 2025

### *Cataloging Backlog Progress*

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

Since the January 9<sup>th</sup> RSA Board meeting, the CMC has processed:

- encoding level 8 requests = only 1 (Nearly all of these requests have already been processed.)
- encoding level M requests = 68

332 cataloging requests remain to be processed in the backlog, with the oldest submitted in December 2018.

The CMC is on track to finish the RSA backlog by the end of CY2025.

### *Brief Record Upgrades*

Since the January Board meeting, the RSA cataloging department has upgraded 119 brief records to OCLC records with full bibliographic description.

RSA continues to upgrade brief records entered into WorkFlows as far back as February 2023.

### *Cataloging Site Visits*

The RSA cataloging department conducted two cataloging site visits since the January Board meeting:

- Blandinsville – Hire Library District
- Mount Hope – Funk’s Grove Townships Public Library District

Combined, these visits reached 3 library staff for a total of 6.5 hours.

### *Cataloging Training*

Erin taught the Basic WorkFlows Cataloging Workshop on Zoom on January 14<sup>th</sup> for six participants from five different libraries.

No Bibload Workshop was scheduled for January.

Erin, Jennifer, and Erica participated in a Cataloging Maintenance Center webinar on January 9<sup>th</sup>. The topic was cataloging maps. Other than that, January was a quiet month for professional development for the cataloging department.

### ***Other Cataloging Projects***

- Jennifer and Erin continue to participate in iCAMP, the [Illinois Cataloging Mentorship Program](#). Both Erin and Jennifer had iCAMP meetings in January with their mentees. Jennifer has been working with three mentees, and Erin has two. All mentees work at libraries in the Chicago area.
- In mid-January Lisa posted to the Cataloging email forum, sharing a link to this [survey](#) to gauge interest in RSA potentially starting a new project to help libraries catalog their seed libraries using broad category enhanced brief records. These records would allow for better visibility of seed libraries in the RSAcat, as well as helping libraries collect more detailed statistics about seed library usage. So far there have been 14 responses to the survey. A final reminder about the survey will be sent to the Cataloging forum in early February before it closes on the 7<sup>th</sup>. Survey results will be announced on the Cataloging forum at the end of February. If there is enough interest from the membership, RSA will provide documentation on how to use the enhanced brief records and ask for suggestions for the records (garden fruits and vegetables, native Illinois plants, etc.). Thank you in advance for your library's participation in this survey if you currently have, or are considering starting, a seed library.
- Erica collaborated with Antony to research and create three levels of cataloging job descriptions that RSA will use once we are independent from RAILS. The job descriptions were then passed on to Kendal for review.
- In late January Jennifer posted to the Cataloging and Director email forums about pirated items because RSA has recently seen an increase in these items – both books and videodiscs – being cataloging and circulated in WorkFlows. Tips for identifying pirated books and videodiscs were shared in the forum post. If you come across a pirated item in WorkFlows or the RSAcat, be sure to report it to the RSA Help Desk. If you need help identifying whether an item is pirated, reach out to RSA.
- Erica is getting ready to soft launch Item Group Editor training at Illinois Prairie District Public Library on February 13<sup>th</sup>. RSA has not offered this training for several years and has been reworking the curriculum. The Item Group Editor is a powerful WorkFlows wizard that allows you to search for a group of items in your collection and then make changes to all those items in a single batch. Examples of values that can be changed using Item Group Editor include home location, price, item type, and item categories 4-5. RSA is targeting for Item Group Editor training to launch to the wider RSA membership in late February or early March. Please watch the Cataloging email forum once Item Group Editor training begins to be offered.
- Last fall Erica worked with James to submit a custom request to SirsiDynix to rework the item cat 3 script that runs daily, specifically to stop the LARGEPRINT trouble. This trouble involves WorkFlows indexing and BLUEcloud Analytics not being updated after the script changes items from the BOOK to the LARGEPRINT item cat 3. SirsiDynix began reworking the item cat 3 script during the week of January 27<sup>th</sup>. We are unsure how long it will take to develop and test. Once the reworked item cat 3 script is implemented in WorkFlows, please watch the Cataloging email forum for an announcement.



- The RSA cataloging team was busy preparing for the Cataloging Chat on January 29<sup>th</sup>. The purpose of the Chat is to share what's new with the Cataloging Maintenance Center, RAILS Cataloging Services, and the RSA cataloging department. Eight member library staff attended. The agenda, slides, and recording for this Cataloging Chat will be available on the [Membership Chats page](#) on the RSA support site.

## Operations Department Report for 6 February 2025

### *Expectations, Responsibilities, and Compliance*

Laura Keyes and Antony Deter met again by Zoom and Laura worked up a newer draft of the compliance document which simplifies the steps and suggests some potential sanctions the board may want to consider. Laura also suggested potential timeframes for the various steps. This document is on the agenda for consideration at the February meeting.

### *Parameters Parties*

As of January 30, 87 Parameters Parties have been completed (11 this month), and 28 more are in progress. Parties are considered complete once all the tickets raised have been closed. There is only one public library who has not participated in a Party now. Operations Team staff have started holding parties with non-public members. 573 cases have been raised from the 115 parties held. 538 of these are closed at the time of writing. It is expected that the parties for the 34 schools, 2 specials, and 3 academic members will be completed by the end of June. Four school libraries have turned on sharing with everyone and not just other schools since their parties started.

School districts which have multiple RSA members are being encouraged to submit separate forms for each building to Baker & Taylor so each building can have its own scoped eRead collection. Antony is working with Anna Behm to ensure that we are each aware of developments. We know of one school who has already submitted the form. Baker & Taylor have offered to hold a scoping training for school members which we will schedule soon.

### *Documentation Index Update and Support Site*

As mentioned previously, the latest version of the Documentation Index was uploaded to the support site on December 19. The next edition of the index will be published towards the end of March. Patty and Antony have been working on developing updated and more comprehensive documentation for Holds. The first three of these overhauled documents are nearly ready. Between them they combine about 10 existing documents and fill in some gaps. These will be ready to be sent to the Circulation, Circulation Policy and Directors forum in a couple of weeks or so. They will then be shown to the DAC and then the Board with the goal of soliciting and implementing as much feedback as we can.

This model of a more deliberate, strategic approach to updating documentation topic by topic will then be used with other topics.

### *User Cleanup*

The User clean up project continues with work being done to ensure that as few users are assigned to inappropriate User Profiles as possible. Each library now has a Discard, and a No-Transit user set up so that libraries don't have to figure out how to create them. Documentation has been updated to leave out instructions for setting up these types of accounts. Discard and No-Transit User Profiles are being removed from library's drop down menus, as well as some other Profiles for System Users such as ILL and PUBLIC. It is hoped that this will reduce the number of users

misallocated to the wrong profile. Further customization of the drop downs is done following parameters parties. I will be working to identify other system profiles which can be removed from drop downs. I hope to have this project complete by the end of February. The profiles which RSA considers Mandatory have already been added to each library's drop downs.