

Executive Director Report for 3 April 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 (have given formal notice of withdrawal)

- ROWVA CUSD
- East Peoria High School
- Stark County Schools – both branches
- Congerville-Eureka-Goodfield CUSD #140 – both branches

Potential Member Withdraws for FY26 (have NOT given notice)

- *Notice by schools is required 90 days prior to end of FY (by April 1st).*
- *Public library notice requirements are 180 days prior (by January 1st).*
- *A-C Central has not given notice as of 4PM March 27th.*

New Member Inquiries

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

- Hamilton Public Library – Applying for RAILS Automation Grant in April
- Camp Point Public Library - Applying in RAILS Automation Grant in April

Other Notable Membership Activity

Mason Memorial (former Union List) – cataloging to prepare to become automated

- Provided patron entry and some circulation training in September. Will go live without their entire collection cataloged. They'll make temp records for items not in the system, then enter them 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

- Will be staying in RSA for FY26. Question about library's continued existence after that.

RIP Updates: Ongoing Topics & One-Offs

List of major RSA Indi Project (RIP) to-do's that need completion in FY25 & FY 26.

Timeline & Punch List

- Overall timeline and topical punch list for the staff employment process.
- **The timeline and punch list have been rebuilt to match the new staffing go-live date.**

IMRF (Illinois Municipal Retirement Fund)

- **RSA submitted, in the middle of March, the required staff information, service dates, salaries, etc. and check to cover the cost assessment. We now await their process.**

LIMRiCC

- Board Resolutions passed in March. Paperwork packages sent to them.
- LIMRiCC will have additional package paperwork to complete in the fall.
- FYI, we will do a cost comparison for unemployment insurance to see if it's better to go self-insured (low turnover post-staff go-live) vs paying a monthly percentage.

Mission Square

- Board Resolutions passed in March. Paperwork packages sent to them.
- We've had two phone calls and completed additional setup work since sending them the paperwork 2 weeks ago. We 'owe' them banking information once our EIN is cleared or issued anew.

Insurance

- RSA will require additional insurance and changes to our current insurance policies as a direct employer of staff
- RSA will require additional insurance to cover vehicles, renters' insurance, and more.
- We are working with Wyman Group to identify and procure these insurances to be ready to go for 1 Jan 2026

RAILS / RSA IGA's, Property, Etc.

- The RSA Board will need to approve an IGA between RAILS and RSA whenever RAILS has that ready. It covers all the parts of the new relationship.
- Antony and Joe Filapek are working on the list of things RSA currently owns, or that RAILS will give to RSA, or RSA will purchase from RAILS.

Payroll, Benefits & Mandated Personnel Programs

- RSA is working to contact PayCom, our current payroll system also used by PrairieCat, to begin the setup process. So far, we haven't found the correct parties.

Staff Handbook & Staff Policies

- HR Fit is reviewing, revising, and reorganizing the final RSA draft for our review as well as the legal review. Our new lawyers will handle that review.
- The majority of RSA's benefits and practices will be contained in the handbook. While we are retaining many of the practices we are currently used to as RAILS staff, not all can or should be implemented by a vastly smaller RSA.
- The RSA handbook includes some changes to RAILS standards and practices required to better fit RSA's direct customer service orientation rather than the RAILS indirect support and guidance work. Some changes will require staff adjustment from the typical RAILS way to operations.
- We pushed the final version for Board approval to the June meeting.

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.
- We have tweaked where some of the new positions sit on the scale. The newest version is included with the budget notes.

Job Descriptions

- All RAILS job descriptions have been extensively reworked and new levels of responsibility added.
- We created two new positions for system support and reports: Library Systems and Data Analyst, Library Systems and Data Administrator. Target hire date 2 January 2026.
- **We reworked and lowered the duties, requirements, and pay level for the Business and Marketing Administrator position, it is now the Office and Marketing Coordinator. Target hire date 2 January 2026. This position processes payroll.**
- HR Fit and RAILS HR have both reviewed the job descriptions with great comments. We're working to merge and deconflict both sets of notes into 'final' job descriptions.

Computers, Software, IT Infrastructure

- RSA Support Staff can't migrate off RAILS provided systems until the staff cutover.
- RSA can't price Office 365 licensing due to our EIN not being clear! Microsoft and other vendors use your EIN status to determine what type of license (and price) to offer.
- **RSA's new, low cost, Gmail replacement product will roll out at the end of April.**
- RSA Gmail accounts will be released to member libraries to do with as they please on or about 1 May. We will provide the emergency contact info and relay account change codes to libraries who wish to retain their RSA Gmail account. Gmail has changed their verification system to use onscreen barcode links scanned via a smartphone which makes it impossible for RSA to manage or help members.
- We will move staff email accounts to RSA's email domain "@librariesofrsa.org" on staffing go-live date.
- 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.
- RSA will need to procure new laptops, monitors, and supporting hardware as RAILS needs them back for use elsewhere. We have budgeted for this in FY26.

Consulting & Contracts

- HR Fit will continue as the HR department post staffing transition.
- The Office and Marketing Coordinator will serve as the internal HR Point of Contact
- SirsiDynix: New contract will be presented for your approval at the April meeting. Genna will need to sign it.

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 filed EIN paperwork with the IRS and sent a package of paperwork to the IL SOS office in late January. We await the vagaries of the IRS and their potential internal staffing issues to decide. We are stuck in a few areas until we hear back from them.
- **We still need to file 1 day federal and state tax returns to show the transfer of assets from RSA NFP to RSA. We'll also have to file additional paperwork with the IL SOS office to complete the transition. Awaiting EIN clarification first.**

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 projects are reported in Departmental reports or the Administrative section later.

RSAcac Mobile 2

SirsiDynix is working to complete the testing instance of RSAcac Mobile 2 (SirsiDynix's BLUEcloud Mobile 2) for Google Android devices. RSA staff have access to the new app on Apple devices via TestFlight. We are also exploring how administrative management of things like default search limits and library branding customizations.

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. **On hold for staffing issues. Tony has just returned so we may be able to start on this soon.**

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 February. FYI, RAILS is now looking into various website compliance requirements, suggestions, and more as well.**

Staff Updates Since the Previous Meeting

Staff Anniversaries

- None this month

Misc Staffing Notes

- Tony Hahn returned to work on March 27th. We have a very long list of Todo's for him.
- We are changing some internal practices to deal with staff visits, help desk queues, and more to deal with the increased volume of member visits. We intend to visit each library at least once every 18 months which requires some changes from our 2020-2023 COVID operations. We enjoy the visits, and they are helpful and appreciated by most members.

Administrative Projects and Updates Since the Previous Meeting

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

SirsiDynix Restructuring to Focus on BLUEcloud (online clients)

While not technically an RSA project or update, this does affect us all. The SirsiDynix ownership change in December has resulted in an expansion of project to accelerate development of the BLUEcloud online staff clients. At this time, we only know what they've mentioned publicly and expect a full explanation at the April COSUGI conference. Antony, Erica, and James are attending and will report back on what they learn. FYI, all SD customers have been pushing for faster development work on these web-based staff clients even if they don't fully replace Workflows.

19 March announcement:

This week SirsiDynix has undergone a company-wide restructuring that will enable us to significantly expedite the development and delivery of the core BLUEcloud modules our customers need and have consistently requested of us. This restructuring includes shifting personnel to increase our investment in product development. Unfortunately, part of that realignment necessarily included the elimination of some SirsiDynix positions and associated personnel. These decisions are never easy, and we understand that they impact the lives of our friends and associates in a very real way. It is also a challenging time for those who remain with SirsiDynix as they deal with the separation of workmates and friends.

We ask for your understanding and support as we work through this process. We deeply appreciate the contributions made by all our employees, including those who have been directly impacted by this realignment. We are confident, however, that these newly restructured teams are better aligned than ever before to deliver the essential products and services that will propel our SirsiDynix family forward into a new era of industry leadership and delivery of next-generation library solutions.

--Mike Nehren, SirsiDynix Executive VP and the SirsiDynix Executive Team--

21 March announcement:

Hi everyone. Thank you for your questions and for your support during this difficult time. It means the world to us seeing that you are as passionate about our people and our products as we are. Please know that while we are emphasizing the development of core BLUEcloud modules—which have long been a customer priority—we are also continuing to support and, as appropriate, enhance Horizon, Symphony, and EOS.Web. These platforms capably power thousands of libraries of all sizes and types around the globe.

*We have highly experienced staff support for each of these systems and **there are absolutely no plans to end-of-life any of our ILS platforms.** We apologize for any confusion on this point. The entire purpose of the restructuring this week is intended to put more resources toward the development and completion of the core BLUEcloud products. Further, we expect to onboard additional developers as quickly as we can. This initiative is what we refer to as “BLUEcloud Accelerate” and it will continue to move forward with even greater intensity. We hope this provides some clarity. If you have further questions, please don't hesitate to let us know. We will continue to monitor this comment section and provide more information as we move forward.*

--Mike Nehren and the executive team--

The Expectations Project

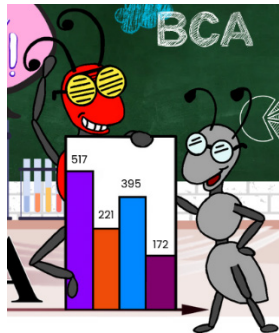
On hold due to independence work.

Outreach Campaigns

- Bug Us Campaign: DAC cards are finished and printed. We'll hand them out in the May meeting.



- The reports Bug Us campaign starts in April. This is the last campaign of FY25. Here's a sneak peek:



- RSA is awaiting delivery of shirts with a Bug Us logo embroidered on them for RSA Day and other events. We were able to get these for around \$30 a piece.



- We 'Focused on the Forums' to such a great extent that we eliminated a bunch of them. We combined all the forums for library discussions outside of major topics into the Library-to-Library forum. The simplification may encourage more participation; most of the intra-library forums had zero posts.
- RSA Day 2025. RSA will have staff available all day for drop-in or scheduled Q&A.

BLUEcloud (BC) Central Backend Refresh and Cleaning

We continue to work with SirsiDynix staff to cleanup, correct, and update the BLUEcloud installation. BC Central talks to our Symphony server, RSAcat, RSAcat Mobile, and other products and provides an online place to administer them. We're having SirsiDynix create several different example library setups: a school, a school with branches, a small public, a large public, a public with branches. We can then use those as references for rolling this out to our members for testing and eventual production work. At first, we'll be focusing on the Circulation module with includes check in/out, billing, patron upkeep, and transiting materials.

We are on track to start testing online Circulation this summer with one or two publics, then add a couple test schools this fall. The online modules require individual Workflows logins for circulation staff. Cataloging staff with individual login will continue to use them with additional online functionality added when we enable their library. For RSA staff, this requires a rethink of all internal processes and an entirely new account tracking system. We are working to implement the tracking system now.

Completed RSA Events: Training & Visits

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

March Events:

Location	Campaign Name	Campaign Type
Bushnell Prairie CUSD	FY25 Parameters Party	Member Services
Galva Jr. Sr. High	FY25 Parameters Party	Member Services
Brown County Public Library and Zoom	RSA Board Meeting	Governance
Mercer County CUSD	FY25 Parameters Party	Member Services
Brown County Public Library (B0)	Cataloging Site Visit	Cataloging
Peoria Main Branch & Zoom	Directors Advisory Committee (DAC) meeting	Governance
Zoom (Spoon River Valley CUSD)	FY25 Parameters Party	Member Services
Zoom (Greater West Central PLD)	FY25 Parameters Party	Member Services
Avon Middle Elementary	FY25 Parameters Party	Member Services
Abingdon-Avon HS	FY25 Parameters Party	Member Services
Bushnell Public Library	Circulation Training and New Director Visit	Member Services
Zoom	Online Basic WorkFlows Cataloging Workshop	Cataloging
Knoxville Public Library	Cataloging Site Visit	Cataloging

Cataloging Department Report for 3 April 2025

Cataloging Backlog Progress

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

Since the March 6th RSA Board meeting, the CMC processed 134 encoding level M requests.

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

The CMC is making excellent progress and is on track to finish the backlog by the end of this year.

Brief Record Upgrades

Since the March Board meeting, the RSA cataloging department has upgraded 164 brief records to OCLC records with full bibliographic description.

RSA is upgrading brief records entered into WorkFlows as far back as May 2023.

Cataloging Site Visits

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

- Lisa visited Brown County Public Library on March 11th. She originally planned to visit to teach the Basic WorkFlows Cataloging Workshop, but it was cancelled due to lack of registrants.
- Jennifer visited Knoxville Public Library on March 25th.

Combined, these visits reached 4 library staff for a total of 6.5 hours.

Cataloging Training

On March 25th Erin taught the Basic WorkFlows Cataloging Workshop on Zoom for two participants. This workshop was originally scheduled for February taught by Rhonda, but it was postponed until March due to Rhonda's departure from RSA.

No Bibload Workshop was scheduled for March.

Over the past month, the cataloging team participated in several webinars on various topics, including serials cataloging, encoding levels, cataloging equipment, inclusive cataloging, and fixed fields.

Other Cataloging Projects

- Erin, Jennifer, and Lisa continued cross training on support topics. This month's topics included cataloger account removals and nonfiction call number assistance.
- Jennifer and Erin continued to participate in iCAMP, the [Illinois Cataloging Mentorship Program](#). Since the March Board meeting, Jennifer and Erin each met with their mentees once.
- Recent cataloging site visits led to three projects to resolve items cataloged on the wrong records. One of these projects has been completed, and two more are in progress. The RSA cataloging team is performing behind-the-scenes database maintenance after site visits, improving the quality of the bibliographic database for both staff and patrons.
- The cataloging team continued to prepare for its RSA Day session "Colorful Cataloging." Lisa designed a new infographic that promotes cataloging networking opportunities, which will be shared during the session.
- As mentioned in last month's report, RSA plans to move ahead creating broad category enhanced brief records to help libraries catalog their seed libraries in WorkFlows, increasing visibility to patrons in the RSAcat and allowing for more detailed statistics. Documentation is currently being written. The goal is to launch the new records in early April. Please watch the Cataloging forum for an announcement.
- The cataloging team made a few tweaks to the Basic WorkFlows Cataloging Workshop curriculum to further shorten it. This workshop takes about four hours to complete.
- The [Deleting Items from WorkFlows Procedure](#) was recently revised to include information how to handle deletions for items that are assumed lost.
- Erica worked with Antony on settings for SirsiDynix BLUEcloud Cataloging, an online cataloging interface that RSA will eventually roll out to the membership for match and attach type cataloging task.
- The cataloging team made excellent progress closing seven Parameter Party follow-up cases from last fall that Rhonda was unable to take care of before her departure from RSA.
- RSA created a new WorkFlows item cat 6 code OCLCEXCLUD for items whose holdings should not be updated in OCLC WorldCat when RSA runs the monthly batch process. Because the holding is not updated in OCLC, the item will not be visible for WorldShare interlibrary loan requests. A message was recently sent to the Cataloging forum asking libraries to stop using OCLCEXCLUD in item cat 5 and begin using OCLCEXCLUD in item cat 6. RSA is in the process of suppressing OCLCEXCLUD in each library's item cat 5 menu so it is no longer visible and cannot continue to be used. On April 7, RSA will batch edit all existing items assigned the OCLCEXCLUD item cat 5 to the OCLCEXCLUD item cat 6. Please reach out to the RSA Help Desk with any questions.

Operations Department Report for 3 April 2025

Item Retention Policy

Since the last Operations report James and Antony worked on identifying just under 200 ILL brief records which had been discharged over 15 months ago, and so they were deleted. 15 months was chosen because it ties in with the 15 months holds data is retained. We established a written procedure and plan to check on these once a quarter. We also identified around 5500 item records which were LOST (various current locations) or MISSING which were over 8 years old and had no bills. As a test project, we wrote to libraries asking them to let us know if they didn't want these lost or missing items to be deleted. A few of libraries have been in touch asking us not to delete them so that they can do a thorough search for the items and delete them manually. About 4600 items were deleted by James and several hundred more have already been deleted by staff at member libraries.

As mentioned at the last board meeting, James had been talking to SEO (a Sirsi consortium in Ohio), and they had shown him the regular maintenance reports they do, and this started us thinking about developing a plan for Item Cleanup. For reference this is the page at SEO's website which we're using a reference point:

<https://support.servingeveryohioan.org/support/solutions/articles/69000858611-automated-database-cleanup-schedule>.

An early draft of an item retention policy will be presented for discussion at the board meeting. Once the board has taken a look at it and perhaps developed better suggested time frames for item clean up, the intention is to send it to the circ policy email forum, then to the DAC in May, and back to the board in June.

Holds and Sharing Policy

Patty and I have continued to work on updating and reorganizing the holds documentation we provide on the support site. There are currently 3 different board level policies on holds and it seemed to us to make sense to combine these into one document which will make it easier for staff at member libraries to find and understand important information on holds. All procedural information has been removed so that the policy should stand only as a statement of intent. Sara and Patty both worked on combining the three previous holds policies into a new draft which is included in the packet. Once all of the holds documentation is complete and the holds page of the support site is updated we plan to host a membership chat in June to update the membership on these changes and what we hope will be a much simpler but also more comprehensive set of documents on this critical topic.

Parameters Parties

As of March 28, 124 Parameters Parties have been completed (16 this month), and 14 more are in progress. Parties are considered complete once all the tickets raised have been closed. All of the parties for public libraries have taken place. Operations Team staff have continued holding parties with non-public members. 649 cases have been raised from the 140 parties held. 630 of these are

closed at the time of writing. It is still expected that the parties for the 34 schools, 2 specials, and 3 academic members will be completed by the end of June.

RSA Day

Registration for RSA Day is closed. There are 157 people who signed up to attend. RSA Day will be Thursday, 10 April 2025 at Five Points Washington. The general schedule for the day is breakout sessions 1 & 2, Keynote, Lunch, Breakout sessions 3 & 4.

	Breakout 1& 2	Breakouts 3 & 4
Room A	Funding Advocacy Session	LGBTQ+ Panel
Room B	B1: Small Libraries Roundtable And Speed Networking	Gingerbread Houses & Fancy Nancy Programs
Room C	AI in Schools: Embracing the Future with Humanity	Marketing Canva
Room D	B1: RAILS Deals & Discounts B2: ISL Statewide DB	Picklist Tips & Tricks
Washington Lib Conference Room	B1: CMC Cataloging Best Practices B2: Lisa Cataloging	Inventory Panel
Registration Area	RSA Chat Session Tables	RSA Chat Session Tables