

Executive Director Report for 6 March 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

Potentially Withdrawing Members for FY26 (have NOT given notice)

- *A-C Central and Quincy Notre Dame – neither has given notice, listed based on previous conversations. Notice is required 90 days prior to end of FY (by April 1st).*

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**
- Creve Coeur Parkview Junior High School – **Haven't heard anything back**
- **Warsaw decided they can't afford RSA right now and is not joining.**

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 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

- **Will be staying in RSA for FY26. We will work with them to try to get them upgraded to circulating.**

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.

- **Remaining in RSA for FY26. Still trying to hire a High School librarian. Grade School has staff**

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 is combining their list with RSA's Todo punch list. Meeting on 13 March to assign out all the remaining tasks.**

IMRF (Illinois Municipal Retirement Fund)

- After many issues finding the right person, we received the application and cost for the actuarial review on 26 Feb. In this case, it was on of their Lawyers being helpful.
- RSA will submit the required staff information, service dates, salaries, etc. and check to cover the cost assessment in early March.

LIMRiCC

- You will be voting to approve a resolution to join LIMRiCC for health insurance and unemployment insurance at this meeting.
- LIMRiCC will have additional package paperwork to complete.

Mission Square

- You will be voting to approve a resolution to create 457b and 401a retirement plans at this meeting.
- LIMRiCC will have additional package paperwork to complete.
- We are still setting up bridge coverage in case of a break in IMRF coverage via MissionSquare. This will only be implemented if there is a gap in retirement coverage from IMRF.

Insurance

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

RAILS / RSA IGA's, Property, Etc.

- RSA, via a Board vote, will need to approve an IGA between RAILS and RSA to cover 'things' of which I'm not 100% sure. This may or may not include the remaining services from RAILS RSA will continue to use (Finance, office space) and/or other things. RAILS is putting this together.
- There will also likely be an official staffing termination letter from RAILS
- 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. They are also setting dates for the return of items RAILS requires back from RSA including laptops and monitors.

Payroll, Benefits & Mandated Personnel Programs

- RSA has contacted PayCom, our current payroll system also used by PrairieCat, to begin the setup process
- HR Fit and RSA's merged Todo list includes all the known remaining things that need to be done to cover all federal or state mandates.

Staff Handbook & Staff Policies

- HR Fit is reviewing, revising, and reorganizing the final RSA draft.
- After that, the new lawyers will review and comment

- 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 intend to present the final version for Board approval at the 3 April 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 are still making minor adjustments in responsibilities and pay rates for new positions.

Job Descriptions

- All RAILS job descriptions have been reworked.
- We have created drafts of job descriptions for Specialist, Coordinator, Consultant position for Bibliographic Services, Operations, and User Experience and Operations (no specialist level). Each department also has a Manager, formerly known as a Supervisor in RAILS.
- We completely reworked the old System and Data position into two new Library Systems and Data Analyst / Administrator positions. Target hire date for this position is 1 January 2026. This allows for 15 months of overall with Kendal to learn all the reporting stuff needed.
- We created a Business and Marketing Administrator position, but we don't think we'll have any candidates as the requirements are quite high. This will be reworked and renamed to become the promotion path position soon. We will create a new Office and Marketing Coordinator position in the next week or so with more realistic experience and educational requirements as the starting new-hire position. The target start date for this position is the first day of direct employment of RSA staff as they will be running payroll.
- HR Fit and RAILS HR have both reviewed the job descriptions with great comments. We'll merge and deconflict both sets of notes into 'final' job descriptions then run a final review process.
- We intend these descriptions to cover all anticipated RSA needs for the next several years. Not all positions will have corresponding staff members employed in them at any one time.

Computers, Software, IT Infrastructure

- RSA Support Staff can't migrate off RAILS provided systems until the staff cutover.
- RSA can not price out 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 has procured and configured a new, very low cost, Gmail replacement. We will provide one email per library to replace the RSA Gmail accounts. This will be a topic for RSA Day and fully rolled out by the end of April. These will be system code @ our domain. For example, "ag_als-pdc@members.librariesofrsa.org"
- 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. FYI, Gmail is moving to a new

verification system via barcode links scanned via a smartphone which make it completely impossible to manage in bulk.

- 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 is for 2 years, with a 5-year extension should we decide not to migrate. **Saves around \$65K a year.**
 - 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
 - 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 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.**

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.

RSACat Mobile 2

We are still working with SirsiDynix to set up a testing instance of RSACat 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 February due to staffing independence work.**

RSACat Header Name/Logo Updates

As part of the RSACat Mobile 2 setup, we think we will be able to set up some type of theme per library for free. That, combined with some library name changes over the years, means we will be reaching out to members to check and update their RSACat profile header name, logo, and colors. We will use those requests to match, as well as we are able, the RSACat Mobile 2 'skin' for each library. No updates until we have RSACat Mobile 2 to review, so we know what to ask for. **On hold until later in the year when things calm down for RSA staff.**

RSACat Online Payments

RSACat and RSACat Mobile both can allow online bill pay. RSACat currently has 24 online bill pay libraries, all those who requested it. This was previously a Full Online only feature. RSACat Mobile is a shared on/off setting and has been available to all members for years. We will be working through all the other Public profiles over the next couple of months to enable this. School libraries can optionally enable it in their RSACat profile. **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 RSACat runs on, to meet Federal guidelines. The new catalog SirsiDynix is working on, which will replace RSA's current catalog, initial roll-out in 2025, includes full accessibility support. **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

- Erin Roberts – 3 years in February
- Erica Laughlin – 16 years in March

Staff Departures

- Rhonda Bierman is no longer with RSA as of 17 February. We are not filling this position. It is being converted into the new Office and Marketing Coordinator.

Misc Staffing Notes

- Tony Hahn is on leave/vacation through about the 27th of March.
- All RSA staff now work in-office three days a week. We added full staff on Wednesday and limit library visits that day for now to ensure we have one day a week to discuss anything staffing independence required.
 - Operations works Mon – Wed in office
 - Cataloging works Wed – Fri in office
 - Supervisors work 4 or 5 days in office
- The eventual goal is 4 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. The handbook points to an RSA Staff Culture guide, last updated in 2019.

This guide is the most appropriate place to update the staff expectations. We will investigate creating an additional member-to-staff/staff-to-member expectations guide.

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.

DAC Survey Results Collation and Digest

We will break down the January and February Directors surveys for discussion at the March 12th DAC meeting. I expect this to lead to additional investigation and potential new programs by the DAC and maybe the Board.

Outreach Campaigns

- Bug Us Campaign
 - The DAC's requested 'Bug Us' business cards are ready for their review at the March 12th meeting.
 - Reports will have a Bug Us campaign in April. This is the last campaign of FY25.
 - RSA is in the process of purchasing shirts with a derivation of the overall bug us logo to identify us at RSA Day and other events.
- '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 sign-up 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. Turns out we have LOTS of cruft that needs removed, reconfigured, etc. SirsiDynix is going to setup several example members for us. We can then use them to create fully featured setups as we slowly help members start using the browser based client. Workflows will still be required for more in-depth functionality and cataloging.

We'd like to roll out online Circulation in the summer with one or two publics, then add a couple test schools this fall. This will require a conversion to individual Workflows logins as well for all non-cataloging functions. That is requiring a complete rethink of just about every RSA internal process.

RSA Operations and Administrative staff members have been and continue to Zoom trainings for administering this.

Completed RSA Events: Training & Visits
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Training sessions or member visits can be either in-person, virtual, or in some cases both.

January Events:

Location	Campaign Name	Campaign Type
Astoria HS	Parameters Party	Member Services
Flanagan Cornell CUSD	Parameters Party	Member Services
Zoom / Stark County	Parameters Party	Member Services
Warren County Main Branch / Zoom	FY25 February 6 Board meeting	Governance
Zoom / A-C Central	Parameters Party	Member Services
Clayton Public Library District	Cataloging Site Visit	Cataloging
North Pike Library District	Cataloging Site Visit	Cataloging
Illinois Prairie District Public Library - Metamora Branch	Item Group Editor Training	Cataloging
Zoom	Holds Workshop	Member Services
Zoom	Parameters Party	Member Services
Washington District Library	Basic Circulation Workshop	Member Services
Cambridge GS	Parameters Party	Member Services
Cambridge Jr/Sr HS	Parameters Party	Member Services
Jacksonville Public Library	Cataloging Site Visit	Cataloging
Zoom	RSA Bibload Workshop	Cataloging
Quincy Notre Dame	Parameter Party	Member Services
Quincy PL	Drop in Visit Quincy PL	Member Services
Beardstown Houston Mem Lib	Library Visit	Member Services
Beardstown Jr/Sr HS	Parameters Party	Member Services

What are the benefits of being in RSA?



You're a member of the larger library community, dedicated to resource sharing.

By being a member, you massively expand your collection via access to nearly 4.1 million items within our shared database.

Data shows that 66.57% of RSA patron holds are filled by items owned by other libraries.

RSA consists of 135 member libraries: 3 academic, 96 publics, 34 school, and 2 specialized.

Each library serves a unique local community, which means the shared database has a highly diverse collection available to your patrons.

We value communication and meeting members where they are to provide meaningful assistance.

With our Help Desk, in-person or virtual trainings and visits, a user-experience focused website, and Email Forums, we strive to help in a way that works for your library.

Members are encouraged to provide feedback through the Directors Advisory Committee, via Email Forums and surveys, or by contacting the Help Desk.

We're driven by member-driven decision making.

Please "Bug Us" with your questions and your library's needs and wants.

You're part of an organization dedicated to serving our membership and listening to your needs.

We want to share everything!

RSA is transparent with members about membership fees and organizational goals.

Also, all functions of RSA's shared library automation system and online catalog are available to all RSA members.

Snapshot of RSA's services

RSA governance leadership opportunities.

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

Detailed documentation and guidance for interacting with the shared library automation system.

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

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.

Spaces for member-to-member engagement and networking, such as RSA Day.

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

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

Timely automation system troubleshooting assistance.

Finally...

By being part of RSA you are increasing your value to the taxpayer and creating a better experience for your patrons and staff.

Contact RSA today to learn more.
help@rsanfp.org | 866-940-4083

RSA

Operations Department Report for 6 March 2025

Expectations, Responsibilities, and Compliance

A revised version of the draft Ensuring Compliance by Member Libraries policy has been prepared. Changes were made based on discussions at the February meeting.

Parameters Parties

As of February 28, 108 Parameters Parties have been completed (21 this month), and 21 more are in progress. Parties are considered complete once all the tickets raised have been closed. There is still one public library who has not participated in a Party but that is scheduled for early March. Operations Team staff have continued holding parties with non-public members. 618 cases have been raised from the 129 parties held. 579 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.

Several schools have submitted separate forms for each building to Baker & Taylor so each building can have its own scoped eRead collection.

Documentation Index Update and Support Site

As mentioned previously, Patty and Antony have been working on developing updated and more comprehensive documentation for Holds. Patty has done the bulk of the writing of these documents. We hope that once this work is complete, we will be providing documentation which is both more comprehensive and easier to navigate.

The plan for updating the Holds documentation is as follows:

Original docs	New
Placing Title Level Holds Cheat Sheet	Placing Holds Guide (including much brand-new material)
Placing Copy Level Holds Cheat Sheet	
When Items are Unavailable to Fill Hold or Picklist Request Cheat Sheet	Processing Holds Guide
Onshelf Items Wizard Cheat Sheet	
Sorting the Onshelf Items List Cheat Sheet	
Sending and Receiving Items Cheat Sheet	
Processing Expired Holds Guide	
Trapping Holds Guide	
How Holds Work Guide	How Holds Work Guide
Important Things to Know about Holds Guide (some of this was used elsewhere too)	
Items Requested by a Non-RSA Library Procedure	Updated
Placing Book Club, Classroom or Research Holds Guide	Updated

Setting Up and Using a NO-TRANSIT Account Guide	Updated. Setting Up section removed because each library now has one
Why didn't my patron's hold get filled by my item? Guide	Updated
Hold Shows Available but Hasn't Transited to Pick up Library Cheat Sheet	needs revision
Processing Found LOSTTRANS Items Cheat Sheet	needs revision as Processing LOST TRANS Items Cheat Sheet
Holds Training Resources Cheat Sheet	needs revision

The first three of these overhauled documents are completed and have been shared with the circulation email forum. They will also be shared with the DAC at their March meeting and any feedback will be incorporated.

Two of the policies regarding holds, **Clean Holds Shelf List Policy** and the **In Transit Items Policy** contain procedural instructions. We plan to bring updated versions of these containing only policy language to future board meetings.

Once we have completed the work on the Holds documentation, we will start working on Billing. We have also started a running list of new documentation which is needed.

Item Cleanup

RSA staff have started developing an Item Cleanup plan. Erica and Antony were thinking that the User Retention policy offered a good model for developing an Item Retention policy.

For background, 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>.

While researching this issue we found several hundred ILL brief records which had no bills and were discharged which we felt could be deleted. We also found 5500 items 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 couple 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.

We plan to draft an Item Retention policy which we'll send to the relevant forums and to the DAC over the next few months so that we can keep on top of cleaning up "dead" items in future.

Cataloging Department Report for 6 March 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 February 6th RSA Board meeting, the CMC has processed:

- encoding level 8 requests = 0 (All of these requests have been processed.)
- encoding level M requests = 7

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

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

Brief Record Upgrades

Since the February Board meeting, the RSA cataloging department has upgraded 177 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 February Board meeting:

- Lisa visited North Pike District Library on February 11th.
- Jennifer visited Jacksonville Public Library on February 25th.

Combined, these visits reached 4 library staff for a total of 5.75 hours.

Erin planned to visit Clayton Public Library District, but the visit will be rescheduled due to illness.

Cataloging Training

The Basic WorkFlows Cataloging Workshop scheduled for February 27th on Zoom has been postponed for those who registered to March 25th. Erin will teach the workshop for two participants from one library.

On February 25th, Erica taught the Bibload Workshop on Zoom for one participant.

There was a virtual OCLC Cataloging Community Meeting on February 12th that the cataloging team attended portions of. We plan to listen to the recording at a later date. The cataloging team also participated in an OCLC webinar on February 20th that discussed the fixed fields on bibliographic records.

Other Cataloging Projects

- Erin, Jennifer, and Lisa started cross training on various cataloging-related topics, such as parameter support and item on wrong record cleanup, as part of the cataloging department's 2025 annual theme "Cross Training and Knowledge Sharing."
- The cataloging department began to prepare for its RSA Day session "Colorful Cataloging." The session will provide a networking opportunity for cataloging staff while coloring and enjoying snacks.
- Jennifer and Erin continue to participate in iCAMP, the [Illinois Cataloging Mentorship Program](#). Since the February Board meeting, Jennifer met with her mentees twice, and Erin met with hers once to discuss cataloging-related topics and provide guidance.
- Lisa joined the Unite Against Book Bans in Illinois (UABBIL) Regional Response Team as a volunteer. UABBIL is focused on connecting those facing book ban challenges with fellow librarians in their area who can offer support. Volunteers might help in a variety of ways: listening and providing validation to the person facing the book challenge, researching and offering information and resources to justify the importance of a work, connect them to others who have been in a similar situation, attend Board meetings to show support and be a friendly face, encourage them to report the challenge to the ALA office of intellectual freedom to track challenges (or offer to report on their behalf if they are concerned to), etc. To learn more or request support: <https://www.ila.org/advocacy/unite-against-book-bans-in-illinois>.
- Erica visited the Metamora Branch of Illinois Prairie District Public Library on February 13th to soft launch WorkFlows Item Group Editor training. The training for four staff went well. Item Group Editor training was officially launched to the RSA membership on February 26th on the Cataloging email forum. Libraries interested in Item Group Editor training are asked to email the RSA Help Desk. Training requests are scheduled on a first-come, first-served basis.
- RSA will 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. Using these records will be optional. The RSA membership was surveyed over the past month to gauge interest in this project. The seed library enhanced brief records and accompanying procedure will be shared on the Cataloging forum by early April.
- A new report that ensures items cataloged in WorkFlows are assigned the correct item cat 3 based on the item type or the large print, braille, or government document coding in the bibliographic record is now running daily in WorkFlows. SirsiDynix recently developed this custom report. It is running smoothly and does not cause indexing trouble with large print items as the old item cat 3 script did.