Executive Director Report for 5 June 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 (awaiting their answer on what, if anything they need)
- East Peoria High School (full export provided. Awaiting further requests)
- Stark County Schools – both branches (full export provided. Awaiting further requests)
- Congerville-Eureka-Goodfield CUSD #140 – both branches (full export provided. Awaiting further requests)

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.

Hamilton Public Library – Received RAILS Automation Grant in May
- Need to get item barcodes ordered ASAP. Working with Director to get that going
- SirsiDynix completed setting up the empty library policy: **HMILTON-PL**
- RSA staff have lots of work to do to complete full system setup
- Will schedule initial cataloging parameters call in June (Erica/Kendal ~ 2 hours)
- Will schedule basic cataloging training in June, once barcodes are ordered

Camp Point Public Library - Received RAILS Automation Grant in May
- Already have RSA barcodes for items from previous membership in RSA
- SirsiDynix completed setting up the empty library policy: **CO_CAMP-PT**
- RSA staff have lots of work to do to complete full system setup
- Will schedule initial cataloging parameters call in June (Erica/Kendal ~ 2 hours)
- Will schedule basic cataloging training in June

North Pike LD – Adding Perry Branch – Finalizing minor corrections to RAILS grant.
- SirsiDynix completed setting up the empty library policy: **GI2_PERRY**
- RSA staff have lots of work to do to complete full system setup
- Will schedule cataloging parameters call for branch specific settings in June (Erica ~ 1 hour)
- Will schedule basic cataloging training in June if they need it for part-time hires

RIP Updates: Ongoing Topics & One-Offs

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

EIN Change/Clarification w/ IRS

- I've asked the lawyer very specifically when they will be making contact again with the IRS. They've been calling but getting the typical hold for heavy call volume responses. I've also asked for a timeline for completion of the process. Pending their response, I may rescind our representation agreement and move all the EIN and RSA status files over to our new, local lawyers.

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)

- Board will vote to approve membership and appoint an authorized agent at June meeting.
- Post meeting, put final submission package, including letter of support from RAILS, in mail to IMRF. The IMRF Board then ensures we can meet financial obligations for 10 years and approves, or not, our membership submission at one of their Board meetings.

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.

Bank Accounts

- If we get a new EIN, we will need to get all new bank accounts. If/when that happens, we'll contact the bank and get that ball rolling. That is hundreds of pages of paperwork.

Mission Square

- Board Resolutions passed in March. Paperwork packages sent to them.
- Everything is setup except providing updated bank account information once our EIN is cleared or a new EIN is issued.

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

- No action taken. Other task took precedence.

Staff Handbook & Staff Policies
- RSA admin staff and HR Fit finished reviewing, revising, and reorganizing the Handbook. We have submitted it for legal review with our new lawyers. Unfortunately, due to its size (90 pages) and being new, legal review will not be completed for the June meeting. Since that is the case, we've told the lawyers to take their time. We expect it will be ready for review and potentially approval in August.
- The RSA handbook is geared to fit RSA's direct customer service orientation. There are some changes from our current RAILS based practices that may require staff adjustment.
- Reworking for the 2019 Staff Culture Guide and the 2021 Internal Staff Communications Guide. The later was written for remote work and needs a rethink for in-office comms.

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.
- RAILS is paying for a review of this scale as part of the Job Description benchmarking. HR Source expects between 10-30% reduction for Peoria Area costs vs Chicago-land costs. We can apply corrections after that study is finished if we feel we need to.

Job Descriptions
- All 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 Analysist, and Library Systems and Data Administrator.
- The Office and Marketing Coordinator position was completely rewritten.
- HR Source has taken our job descriptions for a benchmarking project. They are backed up right now and we expect them to finish in the fall.

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 IONOS relled out at the end of April. End of Month bulk reports coming from BCA are going to these accounts as are the Symphony generated notices, hold shelf lists, and other general Symphony generated reports.
- RSA Gmail accounts have been released to member libraries to do with as they please on. We are providing the emergency contact info and help with account change codes which are currently being sent to RSA's after hours phone.
- 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

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. The auditors are working on this tax return now.
- 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.

RSAcat Mobile 2
SirsiDynix is working to complete the testing instance of RSAcat 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. We are requested the Board approve a new privacy policy that is required for this new app by the app stores.

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. We are also looking to a responsive design update which will make the full catalog work much better on small screens and update some of the current site elements. We're working to get that scheduled with SirsiDynix now.

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. On hold until the outcome of the responsive design update is known.

Updated User Holds Limits Implementation
We are in the final stages of touching the hundreds of user profiles to update the max hold limits be the Boards instructions. Simply stated, that means 'People' now have 50 max holds, 'Institutions'

now have 100 max holds, and 'Internal Library Use' accounts have an unlimited max. We are also updating the holds parameters documentation and will publish this on or about the 1st of May.

Removing Paid Bills (we need to do this)
We need to remove all the PAID bills in the system older than 5 years. The system can't display the total number of paid bills imported into the system and created since go-live in Dec 2007. The Count Bill Report run in Workflows took over two hours to finish and generated a file of 495 gigs of data. Needless to say, we can't even open it to see the full count. Running this report may have resulted in the system instability that caused the emergency system restart last Tuesday.

BCA's count of paid bills starts with bills paid in 2010 and later. It counts over 9.5 million paid bills. If we clear out all paid bills older than 5 years, that will leave about 1.5 million paid bills in the system. Cleaning paid bills is also part of the future circulation related features retention policy.

We expect this project to take between a week and a couple months depending on the effects to the overnight indexing process!

Infographic on Holds Coming via Delivery
I've attached a nice infographic RAILS created from the data we gave to Monica and Joe when the IMLS funding cuts talk started. As you can see, RAILS delivery is crucial to RSA operations.

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

Staff Updates Since the Previous Meeting

Staff Anniversaries
- Antony Deter, 2 years in June
- Lisa Schemensky, 8 years in July

Misc Staffing Notes
- We've been spending lots of time adding to and updating our SPOT database. This is RSA's 'Single Point of Truth' for everything outside of Help Desk cases. We've added the official membership lists and member data, individual user account listings, knowledge bases for staff, the documentation database, and more. Antony has probably emailed you at least once during this process. The upshot is that we've just about completed the work of having only one place to look for information. The overall idea is that we shouldn't have to look in many places to find our most important information. SPOT has accurate data about members, and the Help Desk, which we call "Guru", have just about everything we need to know. Untold numbers of Excel spreadsheets and Word documents storing this information have happily been consigned to the dumpster.

- We've updated practices to deal with our plan to visit each member library in person once every 18 months. These visits are informative to both sides and generally result in system updates to make the member's life easier.
- RSA staff will start working 4 days a week in the office in July. Operations staff will WFH on Mondays, Catalogers will WFH on Fridays through the end of the year then we'll swap the WFH days for the Jan – Jun timeframe. This has been the long-term plan since May 2021 and I'm happy we're finally here.

Administrative Projects and Updates Since the Previous Meeting

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

FY26 Budget – Minor Updates
I've updated the FY26 budget to include the 2 new RSA members and the increase in cost to North Pike for their branch. Since we have the IMRF employer percentage, I also updated that on our internal copy. These updates all result in additional income to RSA with no change in the expenditures. Since Finance uses our full budget breakout for invoice Members, I need to make sure it accurately reflected what they need to invoice. I'll include the updated Board Ops Cost Summary in the Board package notes so you can see the updated info.

Outreach Campaigns
- Bug Us Campaign work has been completed for FY25. We've released an overall campaign, and three department focused campaigns.
- Future Bug Us work will shift to the Office and Marketing Coordinator in January. Any minor adjustment that need to be made as needed. We expect that to include a new Help Desk email address later this year.

BLUEcloud (BC) Central Backend Refresh and Cleaning
SirsiDynix has completed their cleanup work on our BLUEcloud backend. This removed or reworked about 12 years of alpha and beta testing we've done on various things during that time. SirsiDynix created several different example library setups: a school, a school with branches, a small public, a large public, a public with branches. RSA staff will use those as references for rolling out BLUEcloud Circulation for testing and eventual production work.

Fondulac has graciously agreed to be a test location. We will find at least one more public, preferably a small one, to be an additional initial test site. This fall we'll try to get 1 or 2 schools onboard to start testing as well. Once we get feedback from the testers and work up some documentation, we'll consider further rollouts. While not a full Workflows replacement, the online Circulation module should be all that's needed for typical Circ desk tasks.

Individual User Accounts
Like BLUEcloud Analytics, the BC Circulation online module requires individual login accounts. Add in the existing individual Cataloger accounts for Workflows, and the Quincy individual Workflows Circulation accounts, and we've got a large number of things to think about and track.

We've been doing lots of thinking about, planning for, and implementing tracking for these individual accounts. RSA already has over 1,000 individual Workflows Cataloger/Circulation and

BCA accounts. Once we enable the online Circulation module RSA-wide, we'll be adding in potentially thousands more. For now, each staff member could have at least one Workflows Cataloger, Workflows Circulation, BC Circulation, and BC Analytics individual accounts. Antony has been emailed Directors to double-check all existing individual accounts are still valid the last two weeks so we start from a known good list.

We've updated our SPOT and Guru setups to help track individual accounts at the member library staff level, and devised a system to notify Directors after we remove or setup accounts. We've been testing semi-final internal operations to add/removed accounts as we're informed about them.

RSA Help Desk, a.k.a. Guru
Salesforce is depreciating 2 of their 3 sets of automation methods. Unfortunately, we use both automation methods being depreciated in December. We've begun the work to move these automations over to the new method. We will most likely reach out to the consultants who helps us set all these up in 2019 to finish this work. The most visible change to our Member libraries is the updated emails with RSA branding and a more modern, more informative email body with more case details when Member libraries open cases in the help desk.

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
Delavan Public Schools via Zoom	FY25 Parameters Party	Member Services
Abingdon-Avon CUSD Hedding GS	General training and new director visit	Member Services
Morrison and Mary Wiley Public Library	Item Group Editor Training	Cataloging
Hudson Area Public Library District	Item Group Editor Training	Cataloging
Winchester CUSD via Zoom	FY25 Parameters Party	Member Services
Five Points, Washington IL	RSA Day 2025	Other
Havana High School	FY25 Parameters Party	Member Services
Heyworth Public Library District (HE)	Item Group Editor Training	Cataloging
Central CUSD #3 via Zoom	FY25 Parameters Party	Member Services
Chillicothe Public Library District (CP)	Item Group Editor Training	Cataloging
Zoom / Unity SD	FY25 Parameters Party	Member Services
Winchester HS	FY25 Library Visit	Member Services

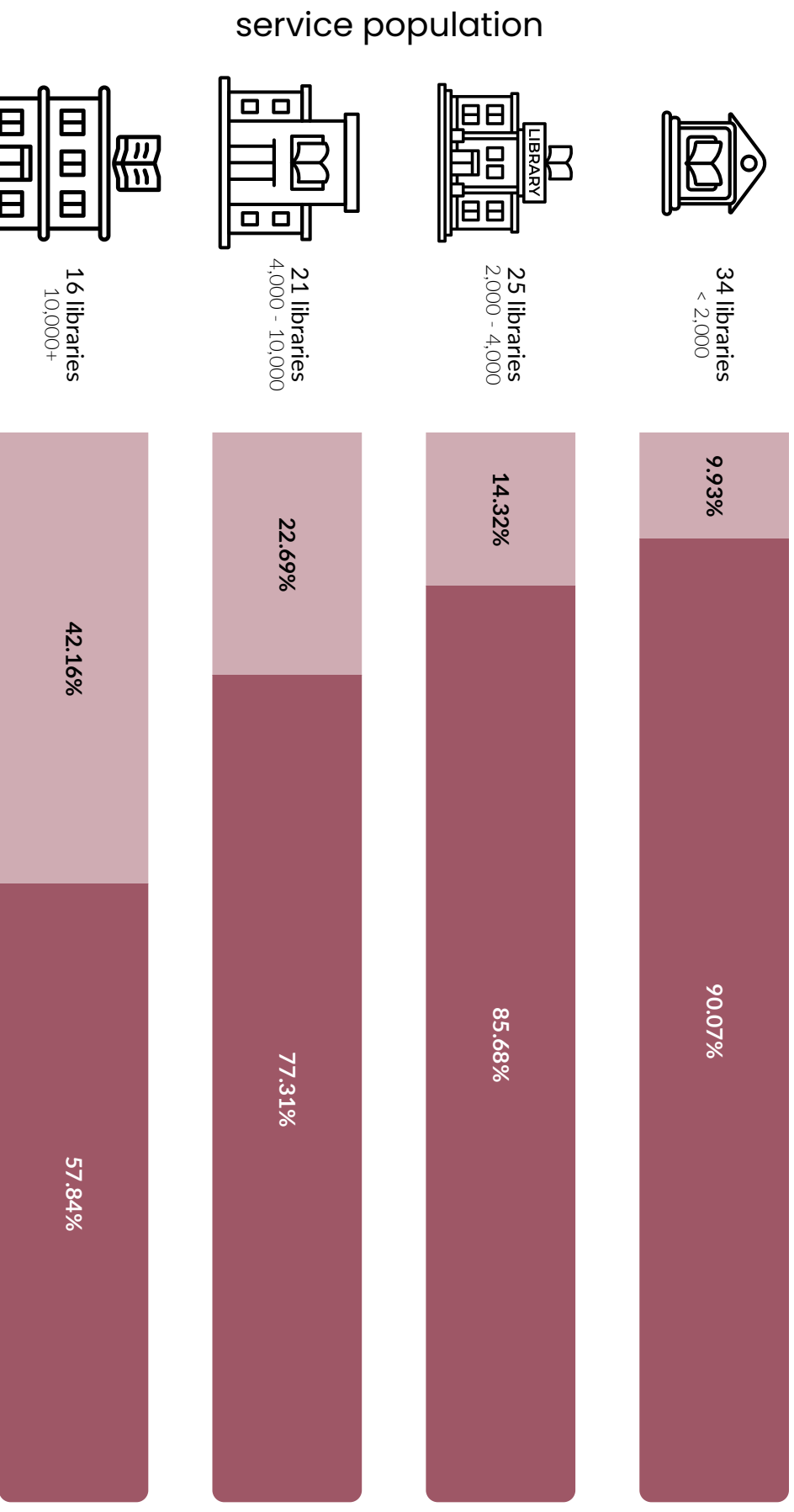| Winchester PL	FY25 Library Visit	Member Services
Dunlap Public Library District	RSA Bibload Workshop	Cataloging
Filger Public Library	Cataloging Site Visit	Cataloging
Zoom Event	Online Basic WorkFlows Cataloging Workshop	Cataloging
Alpha Park PLD (AP)	Cataloging Site Visit	Cataloging
Zoom Event	April 2025 Reports Membership Chat	Reports
Havana Jr High via Zom	FY25 Parameters Party	Member Services
LaHarpe Carnegie Public Library District	Cataloging Site Visit	Cataloging
Morrison & Mary Wiley Public Library	Cataloging Site Visit	Cataloging
Alwood Elementary School	FY25 Parameters Party	Member Services
Alwood Middle High School	FY25 Parameters Party	Member Services
Martin Township Public Library	Cataloging Site Visit	Cataloging
Towanda District Library	Cataloging Drop In	Cataloging
Brown County Public Library and on Zoom	May 2025 DAC	Governance
Zoom Event	FY25 Holds Workshop	Member Services
Spoon River College via Zoom	FY25 Parameters Party	Member Services
Clayton Public Library District	Cataloging Site Visit	Cataloging
Wethersfield #230 via Zoom	FY25 Parameters Party	Member Services
Zoom Event	Basic WorkFlows Cataloging Workshop	Cataloging
Roanoke-Benson High School	FY25 Parameters Party	Member Services
Kewanee HS via Zoom	FY25 Parameters Party	Member Services

PUBLIC LIBRARY HOLDS

Library vs. Interlibrary Loan Fill Rate

April 2024 – March 2025

Library Filled   ILL Filled

service population

proportion of holds

service population	Library Filled	ILL Filled
16 libraries 10,000+	42.16%	57.84%
21 libraries 4,000 - 10,000	22.69%	77.31%
25 libraries 2,000 - 4,000	14.32%	85.68%
34 libraries < 2,000	9.93%	90.07%

RAILS