

RSA Report for 9 July 2025

Membership Updates: Ongoing Topics & One-Offs

Members Who Withdrew from RSA as of 1 July 2025

- ROWVA CUSD, East Peoria High School, Stark County CUSD Elementary and Jr./Sr High Schools, Congerville-Eureka-Goodfield CUSD #140 Middle and High Schools

Notable Membership Activity

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

- Continues to catalog items
- Ordering Patron barcodes so they can begin entering their patrons

Hamilton Public Library – Just received RAILS Automation Grant

- System library name: **HMILTON-PL**
- Will schedule initial cataloging parameters call in June (Erica/Kendal ~ 2 hours)
- Will schedule basic cataloging training in June

Camp Point Public Library – Just received RAILS Automation Grant

- System library name: **CO_CAMP-PT**
- Initial Cataloging Parameters call completed
- Working to schedule Basic Cataloging training for July

North Pike Library District is adding and new branch in Perry – Just received RAILS Automation grant

- System library name: **GI2_PERRY**
- Will schedule cataloging parameters call for branch specific settings soon
- They are still finishing work on the building which is consuming all of their time

RIP Updates: Ongoing Topics & One-Offs

List of major staff related RSA Independence Project (RIP) to-do's that need completion in FY26.

EIN Change w/ IRS – Reason for delayed direct staff employment now scheduled for 1 Jan 26

- Our lawyers expect we will have a new EIN by early August. They continue to work with the IRS to complete this task.

Timeline & Punch List Major Items

- IMRF has our full application and a letter of support from RAILS. They are taking a final look at the application and will either have a couple more questions or add our membership request to their next Board of Directors agenda. We are on track for IMRF membership as of our 1 Jan 26 staff start date.
- We are using the same LIMRiCC health insurance package as RAILS currently offers. We're just awaiting the final EIN number to complete a couple things with them. We are on track for 1 Jan 26 staff start date.
- Mission Square will host our voluntary retirement accounts. Ready to go now.

- Bank Accounts, Check Signers, Check Deposit Machine, and Certificates of Deposit: All will need to be redone as the change in EIN invalidates our current accounts. This is not hard work, but it is time consuming at around 1,000 pages of documents. We will start this right away once we have the final EIN and complete it ASAP.
- Insurance policies are in a state of flux. We are working with our agents to ensure we have all the correct coverages required for vehicles, and anything staffing related.
- We believe the RSA Board will need to approve an IGA between RAILS and RSA whenever RAILS has that ready. This document will cover all the parts of the new relationship and supersede many aspects of our current FY26 RAILS Automation Grant. The Grant paperwork currently covers things like the staffing, vehicle, and housing arrangements.
- Antony and Joe Filapek are working on the list of things RSA currently owns, or that RAILS will sell or provide to RSA.
- RSA's new Staff Handbook is at the lawyers being reviewed. They requested a longer review to ensure our new entity and staffing procedures are configured correctly. They expect this review to be finished for the RSA Board meeting in early August.
- RSA revised all our existing job descriptions, and created many more to cover all expected hiring and promotional opportunities for the next several years. RAILS is paying for a review by HR Source and a positional benchmark using the Peoria Area as the market rather than the Burr Ridge and Suburbs market. That review is pending HR Source's staffing availability. We do not need this to hire staff, but would prefer that it was completed prior.
- We still expect to start the staff hiring process in August for existing staff positions, any open positions will be advertised starting in October. We will have at least the 2 new positions to advertise and fill. Any staff new to RSA would be expected to start in early January.

Computers, Software, IT Infrastructure

- RSA Support Staff can't migrate off RAILS provided systems until the staff cutover. Since we're RAILS staff right now, we need to be in RAILS system for FOIA request purposes.
- We will obtain Microsoft Office 365 licensing soon after we have the new EIN. Microsoft and other vendors use your EIN status to determine what type of license (and price) to offer. We intend to cut over to RSA's email domain on 1 January 2026 for all staff and help desk email.
- RSA's new, low cost, Gmail replacement IONOS rolled 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.
- 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.

Patron Facing 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 further down.

RSAcac Mobile 2

SirsiDynix is testing RSAcac Mobile 2 (SirsiDynix's BLUEcloud Mobile 2) for both Apple and Google Android devices. We are also exploring how administrative management of things like default search limits and library branding customizations. The beta version of the apps work nicely for many things but are not as fully featured as the existing RSAcac Mobile app yet. When we feel we are closed to a full release, we'll request staff members in our libraries to review the app at that time.

RSAcac on the Web – Updates coming in the next couple months: Responsive Theme, Header & Logo Updates, Online Payments for all Public Libraries

RSAcac will be receiving a server update at some point this fall to move it to the newest version of the software. We are also working on an responsive design update to make it work better on mobile phones. These two changes will result in a slightly more modern look and feel. In addition, as part of the setup process for RSAcac Mobile 2, we'll be working with members to update the look of their headers and logos if needed. Finally, we'll be rolling out online bill pay to all public libraries around this same time. Online bill pay has been live for patrons for years via the current RSAcac Mobile app and the 24 Member Library's who requested it in their RSAcac online profile.

Updated User Holds Limits Implemented

We have adjusted the user profiles in the system to update the max hold limits to reflect the Board of Directors 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. The documentation on our Support Site has been updated to match the new limits. As of 2 July, approximately 10 Adult/YA/JUV/Senior patrons have more than 25 outstanding holds.

Staff Updates Since the Previous Meeting

Staff Anniversaries

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

Misc Staffing Notes

- We continue to add and update various member data points in our "SPOT" database. This is RSA's 'Single Point of Truth' (SPOT) for everything outside of Help Desk cases. We have, and may continue, to email all of you with questions about various issues as we seek to build and verify as much data as we think we may possibly need for RSA operations.
- SPOT has accurate data about our members outside of the Help Desk, which we call "Guru", contains all of our support cases and support history. Between these two things, we have just about everything we need to know about RSA as a whole, our member libraries, and the staff in those member libraries who interact with RSA or have individual accounts in our various products. Over the past year, we've eliminated the need for untold numbers of Excel spreadsheets and Word documents previously used to store this information in an ad hoc manner. We thank each member library and all RSA staff for their efforts to ensure our data is as accurate and up-to-date as possible.

FY25 Library Training and Meetings Totals

In FY25, RSA held a total of 235 events, interacting with 695 people for approximately 442 total contact hours.

- 235 Events break down as:
 - 60 Cataloging focused events
 - 158 Library Services/Operations focused events
 - 16 Governance or Miscellaneous events
 - 1 RSA Day
- Included in the event total were 27 Workshops taught
- Also included in the total were RSA Staff's site visits: 31 Cataloging Site visits, 18 New Director Site Visits, and 130 Parameters Party visits

Administrative and System Level Projects and Updates

A running list of major system level projects not directly visible to patrons or other updates from Administration.

Removing Paid Bills Project Completed

We have removed all the PAID bills in the system older than 1 Jan 2020. The reduction dropped the number of paid bills in the system from over 9.5 million to about 1.6 million. Ongoing cleanup of paid bills in the future is part of the draft system retention policy.

Documentation Rework

The completed documentation index is proving valuable in many ways. Outside of giving members a single place to look for documents, it's also allowing us to see the places where we need to enhance, update, or remove our written guidance.

RSA staff are reviewing our mass of documentation to see where we have overlap, many documents related to the same subject, or documentation holes. We're selecting the areas with the most bang-for-the-buck to work on first. Holds documentation, for example, is in the process of being greatly reduced and simplified.

Outreach Campaigns

- The Bug Us Campaign work has ended for now. We've released an overall campaign, and three department focused campaigns. We're resume the Campaigns later this year or early next year which will allow us to provide documents with RSA's new email addresses.

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 and Henry PL have agreed to be test locations. 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. This access will require the issuing of Individual Workflows Circulation and BC Circulation accounts.

Individual User Accounts

Like BLUEcloud Analytics, the BC Circulation online module requires individual login accounts. These systems are accessible from any web browser in the word and do not sit behind RSA's firewall. As such, they need much greater access control, individual accounts, and long and complex passwords.

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 several thousand more. As we slowly roll this out, each staff member at a library could have one or more individual accounts. For some large libraries with branches, Washington PL and Warren County for example, some staff may need addition per-branch circ accounts as well. As of right now, RSA has individual accounts for Workflows Catalogers, Workflows Circulation staff, BLUEcloud Circulation, and BC Analytics accounts. As you can imagine, being able to quickly and easily track, create and remove these accounts is very important with only a couple of RSA Support Staff members doing the work.

We've updated our SPOT and Guru setups to help track individual accounts at each member library. We've updated forms to allow library Directors and School librarians to inform us of staffing changes, and devised a system to notify Directors after we set up or remove individual staff accounts. We need to build a culture of notification between our members and RSA to ensure we can quickly remove staff accounts for departing members to limit access to the system for those who no longer require it.

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. The most visible change to you, our Member libraries, is the updated emails with RSA branding and a more modern, informative email body with case details that's now being generated when you or an RSA Support Staffer 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.

May and June Events:

Location	Campaign Name	Campaign Type
Havana Jr High (Zoom)	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	FY25 Holds Workshop	Member Services
Spoon River College (Zoom)	FY25 Parameters Party	Member Services
Clayton Public Library District	Cataloging Site Visit	Cataloging
Wethersfield #230 (Zoom)	FY25 Parameters Party	Member Services
Zoom	Basic WorkFlows Cataloging Workshop	Cataloging
Roanoke-Benson High School	FY25 Parameters Party	Member Services
Zoom	RSA Cataloging Chat	Cataloging
Mount Hope Funks Gove PLD	FY25 New Director Visit	Member Services
Kewanee HS (Zoom)	FY25 Parameters Party	Member Services
Brown County PL (B0)	Item Group Editor Training	Cataloging
Towanda District Library	Cataloging Site Visit	Cataloging
Henderson County Public Library District	Item Group Editor Training	Cataloging
Carlock Public Library	June 2025 Board Meeting	Governance
Blessing Health Professions (Zoom)	FY25 Parameters Party	Member Services
McLean Museum of History (Zoom)	FY25 Parameters Party	Member Services
Peoria Public Library (P0)	Basic Patron Registration Workshop	Member Services
Edwards River Public Library District	Basic WorkFlows Cataloging Workshop	Cataloging
Washington DL (W0)	Cataloging Site Visit	Cataloging
Zoom	June 2025 Membership Chat	Member Services
Zoom	RSA Bibload Workshop	Cataloging

Cataloging Department Report for 5 June 2025

Cataloging Backlog Progress

In late April, the Cataloging Maintenance Center (CMC) finished working on the backlog of RSA cataloging requests submitted as far back as 2017 and as recently as 2020.

The backlog project began in October 2023 and consisted of:

- 4 braille books in need of upgraded or original OCLC records
- 3,318 pre-publication encoding level 8 records in need of upgrade to full bibliographic description in OCLC
- 1,358 minimal encoding level M records in need of upgrade to full bibliographic description in OCLC

A big thank you to the CMC staff for their excellent work over the past year and a half!

Brief Record Upgrades

Since the April Board meeting, the RSA cataloging department has upgraded 408 brief records to OCLC records with full bibliographic description.

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

Cataloging Site Visits

The RSA cataloging department conducted seven cataloging site visits since the April Board meeting:

- Erin visited Clayton Public Library District, Filger Public Library, La Harpe Carnegie Public Library District, and Morrison & Mary Wiley Library.
- Jennifer visited Martin Township Public Library and dropped in at Towanda District Library.
- Lisa visited Alpha Park Public Library District.

Combined, these visits reached 13 library staff for a total of 12 hours.

The RSA cataloging department is looking forward to routine site visits starting on July 1st. The first group of libraries that the department will visit have not yet received cataloging site visits.

Cataloging Training

Two Basic WorkFlows Cataloging Workshops were taught on Zoom since the April Board meeting:

- Jennifer taught this workshop for seven participants on April 29th.
- Lisa taught the workshop for two participants on May 27th.

Erica taught the Bibload Workshop in-person at Dunlap Public Library District on April 25th for one participant.

WorkFlows Item Group Editor training began in April and was conducted in-person at four libraries:

- Erin trained Morrison & Mary Wiley Library.
- Jennifer trained Hudson Area Public Library District.
- Lisa trained Chillicothe Public Library District and Heyworth Public Library District.

Over the past two months, the cataloging department participated in webinars on various topics, including cataloging government documents, critical cataloging theory, authority records, accessibility metadata, recording series information, and an update on the Resource Description & Access (RDA) cataloging rules. Erica attended the SirsiDynix COSUGI conference in Milwaukee on April 14th -16th.

Other Cataloging Projects

- The Bibliographic Database Policy will be presented to the RSA Board for approval at its June meeting. This policy requires RSA member libraries to adhere to the [RSA Bibliographic Database Standards](#). Due to governance changes over the years, there has been uncertainty about who has the authority to revise the Bibliographic Database Standards. This policy allows RSA staff to revise the Standards as needed without need to have the Board approve each revision.
- The “Colorful Cataloging” networking session hosted by the RSA cataloging department at RSA Day on April 10th was a success! Thirty-one participated.
- An RSA Cataloging Chat was held on Zoom on May 29th. Ten participated.
- Erin, Jennifer, and Lisa continued cross training on cataloging support topics. Topics since the April Board meeting include the correction of items cataloged on the wrong records, loading records into WorkFlows for the McLean County Museum of History, and resolving issues with |z call numbers.
- Lisa submitted a proposal for a panel session at the 2025 Illinois Library Association conference. The session is titled “Peek Behind the Technical Services Curtain: Cataloging for Non-catalogers.” The proposal was accepted. In addition to Lisa, the panel will consist of cataloging staff from Champaign Public Library, CARLI, and the CMC.
- Several cataloging documents were recently revised and are now available on the RSA support site:
 - [Matching an OCLC Record to Your Book Cheat Sheet](#) – Includes additional examples and removes mention of submitting RSA cataloging requests.
 - [Reporting Cataloging Issues to RSA Procedure](#) – Includes an additional option for copy-level holds to be placed on books in need of ISBN additions.
 - [Creating a Brief Record Guide](#) – Includes updated instructions for creating a brief record for a library bound book. Also includes a screenshot example of a cake pan brief record.
 - [RSA Bibload Procedure](#) – Includes information about the OCLC EXCLUDE item category 6 code.
 - [Cataloging At-A-Glance Cheat Sheet](#) – Includes information about Item Group Editor training.

Operations Department Report for 5 June 2025

Item Retention Policy

For various reasons, we decided to delay bringing a draft Item retention policy to the board. Firstly, there are four other policies on the agenda this month, a couple of which are more urgent. Secondly, after deciding to include Paid Bills in the policy, we discovered that there were millions of paid bills in the system going back as long as we have been using Symphony. Seeking permission to remove the oldest of these is on the agenda for June 6, and so I thought I would wait to see the remaining extent of this issue once those have been removed.

Sharing and Holds Policy

As a reminder, the team reorganized and updated 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. It has been sent to the Circulation forum and shown to the DAC and their feedback has been incorporated.

Lost Materials Policy

Following on from the Damaged Materials Policy the board adopted on April 4 which sought to separate out the procedure from the policy intent, the team has prepared a draft Lost Materials Policy. This has also been shown to the forum and DAC. An accompanying procedure is available from the support site here: <https://support.librariesofrsa.org/wp-content/uploads/2025/05/Lost-Materials-from-Other-Member-Libraries-Procedure-2025-05-16.pdf>.

Parameters Parties

As of May 29, 145 Parameters Parties have been completed out of 156. Eight parties are in progress and the last three are scheduled. Parties are considered complete once all the tickets raised have been closed. All but two of the parties for public libraries are now completed. Operations Team staff have continued holding parties with non-public members. 679 cases have been raised from the 153 parties held. 667 of these are closed at the time of writing. It is still expected that the parties will be completed by the end of June.

Prior to the Parameters parties the Circ map had 1276 lines and as of 5/29/2025 there are 861 lines remaining, so that's 415 lines removed. The Circ map is also much easier to navigate as consistent naming conventions have been applied.

Discard Users Project

Discard Users are all automated and every library has one and a report is running in Workflows to discard them. If a Library should accidentally create one RSA staff will be alerted but ultimately the libraries should contact RSA if they need another Discard user, whether that's for a weeding project

or because they are changing the User ID as the Report to clear the Discard User will need to be changed and that can only be done by the RSA.

No-Transit Users

Now that the Discard users Project is complete, we have started working on No-Transit Users. As with Discard Users we decided that one should be created for each library whether they had been using one previously or not. We could then remove No-Transit from library's User Profile dropdowns thus preventing new ones being created in error. These newly created No-Transit users have dummy barcodes and as RSA staff visit libraries these dummy barcodes will be replaced with real User IDs. Libraries are not required to use their No-Transit user but information on how to use them can be found here: <https://support.librariesofrsa.org/wp-content/uploads/2025/03/Using-a-NO-TRANSIT-Account-Cheat-Sheet-2025-01-13.pdf>.

Routine Visits

Both the Cataloging and Operations Teams will be starting a new round of routine visits in July. Kendal set Erica and I the goal of ensuring that each member library is visited within an 18-month period. Members of each team will visit half the members over those 18 months and then they will switch. This means each library will be visited in person every 18 months and will have a Cataloging and Operations team visit every 3 years. Libraries have been organized into visit groups based broadly on the length of time since their last in-person visit.

Holds Limits

At time of writing, we have updated half of the User Profiles with the new Holds Limits approved by the board. It is anticipated that we will have this complete by the board meeting.

Individual Accounts

In preparation for rolling out both Individual Circulation accounts and BC Central we have worked on updating both the Help Desk database and our lists of cataloging, BCA, and circ accounts (these currently only in Quincy). This project is now complete, and we are in a good place to ensure that we can maintain up to date information about these accounts. It is essential that member libraries inform us when their staff leave so that we can quickly deactivate their accounts and secure our systems. RSA staff's last step of the process is emailing the library Director to report that all accounts have been removed/deactivated or created.