

Executive Director Report for 4 September 2025

Membership Updates: Ongoing Topics & One-Offs

Withdrawing Member Cleanup

Illini Bluffs HS requested a MARC export. The librarian in the school says her administration asked her to review other system options thinking they needed to make a decision about the school year ASAP. Antony reached out to her to explain their options and when they needed to notify us. School are required to notify us by 1 May to withdraw for next FY. This is also a new, part-time library person and will need additional training which we'll schedule when we hear back from them.

Notable Membership Activity

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

- Their patron barcodes have arrived.
- We have training scheduled for September to retrain patron entry.
- Once their patrons are entered, we'll help them establish a go live date and set up a visit for that day.

Hamilton Public Library – Received RAILS Automation Grant in May

- We had their cataloging parameters call in July.
- They are awaiting delivery of item barcodes
- Lisa will provide onsite basic cataloging training shortly after barcodes arrive

Camp Point Public Library - Received RAILS Automation Grant in May

- Received onsite cataloging training from Jennifer
- Cataloging dropdown initial customization completed.
- They have started cataloging their collection.

North Pike LD – Adding Perry Branch – Received RAILS Automation Grant in June

- They have some work to do to finalize their new space and are totally focused on that.
- Will schedule cataloging parameters call for branch specific settings
- We may or may not need to provide basic cataloging training, they already know how and may train up their temp catalogers

RIP Updates: Ongoing Topics & One-Offs

List of major RSA Indi Project (RIP) to-do's that need completion in FY26. **Red text denotes new info.**

EIN Change/Clarification w/ IRS

- Lawyers are filing additional paperwork now to remove the responsible party since we aren't required to have one.
- Lawyers filed paperwork with State of IL. Awaiting their response.

Timeline & Punch List

- **We are updating and re-updating this frequently now.**

IMRF (Illinois Municipal Retirement Fund)

- RSA's membership is on the 29 Aug Board meeting agenda. We will reach out to our rep the next week to see what transpired.

LIMRiCC

- 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.
- We will be reaching to them soon to see when we need to enter our existing staff transitioning to the new RSA.

Bank Accounts

- Finished

Mission Square

- Board Resolutions passed in March. Paperwork packages sent to them.
- We need to reach out to verify our banking information and pass along the new EIN.

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 have a meeting with Wyman Group on 10 September to take a holistic look at the new RSA. We will see what they say about additional coverages or better ways to do things. We will need to add auto insurance at a minimum.
- We will begin an exploration of local health care options. This is a longer-term item for possible changes in upcoming years.

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. This work is ongoing.

Payroll, Benefits & Mandated Personnel Programs

- We have settled on Paylocity. Less expensive than PayCom, and has local representatives.
- Antony is reaching out to start the process of getting RSA set up and ready to go

Staff Handbook & Staff Policies

- Handbook approved. We have a tracking document for things that need added or changed (day off in Birth month for example), things RSA Admin or the Board want to look at, and suggestions or questions from Staff. We will need to check at least in Jan and July to ensure no Illinois law changes need incorporated.
- We are working with HR Fit to develop all the various HR, Personnel, Benefits, Evaluations, etc. forms. We started with the existing set of RAILS documents, added HR Fit's knowledge

of other business's forms, eliminated somethings, and are settling on what we feel is the best of everything.

- Antony and I have spent some time working to document our thoughts on 'new RSA' and how to explain and measure those thought for existing and new staff. We've come up with a Staff Traits document which will be folded into everything we do from initial expectations, evaluations, and will be part of the promotion path. We've tried to lay them out in easy to understand chunks with measures, or at least defined outcomes. This will be refined over time as we move forward.
- We've also created a guide that covers how RSA's new Core Principles document passed by the Board in June, effect what staff do and how we support our members.
- The existing, 2019 and 2020 Staff Culture Guide and Internal Staff Communications Guides still need work, but in light of the Staff Traits, we may have a better way to instruct and teach staff. We'll be looking at both to see if we need them still and, if so, revise them to match the new traits.
- The departments will be renamed starting in January to better reflect the full nature of RSA's support. Cataloging becomes Bibliographic Services Department while the Circulation/Ops team becomes the Library Services Department. These names are also reflected in the new job titles.
- RSA will be hiring new staff to fill 25% of our organization. This, along with the freedom to change our focus away from the RAILS methods, is driving much of our vision, expectations, and new methodologies work.

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.
- RAILS HR reports HR Source work will begin very soon.

Job Descriptions

- All job descriptions have been extensively reworked and new levels of responsibility added.
- Entirely new positions were added.
- HR Source has taken our job descriptions for a benchmarking project.
- RAILS HR reports HR Source work will begin very soon.

Computers, Software, IT Infrastructure

- RSA Support Staff can't migrate off RAILS provided systems until the staff cutover.
- Purchasing Office 365 licensing is VERY HARD. Even Microsoft doesn't seem to understand their own rules. We're still working with Microsoft and vendors to figure out where we fall as far as the MS licensing world goes. Very frustrating.
- 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. RAILS may allow RSA to utilize some IT

infrastructure like monitors and the printer as part of our building rent situation. This is currently in active discussion with RAILS.

- 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.
- We've filing additional paperwork with the IL SOS office to complete the transition. Lawyer working on this now.

Patron Visible System Updates, Projects, Issues

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 has updated our beta instance of RSAcac Mobile 2 (SirsiDynix's BLUEcloud Mobile 2) for both Apple and Google Android devices. RSA staff are testing this and working to learn the new administrative interface. We've added the Hamilton, Camp Point, and North Pike Perry branches. Not much progress was made in August due to other commitments.

RSAcac Header Name/Logo Updates

As part of the RSAcac Mobile 2 setup, we are also looking at the existing RSAcac headers. When the new mobile app is ready for us to start building it out for deployment, we'll be reaching out to members to check and update their RSAcac profile header name, logo, and colors. We are awaiting SirsiDynix's installation of a more responsive design for the existing RSAcac web based client to make the full catalog work much better on small screens. That work will be completed by the next Board meeting and RSA staff will be testing it. Still in a holding pattern.

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 until the outcome of the responsive design update. Patrons LOVE online bill pay in the RSAcac Mobile app. Well over half of all payments are made via the app. This is our next big project on the books.

Hoopla, eRead IL RSAcac Integrations

We are working with member libraries who have Hoopla but do not have Hoopla visible in RSAcac. We are also reaching out to all members who don't have eRead IL visible in RSAcac. We can set up

per library integrations for both, but they will come with a small annual fee each per library. We're awaiting bulk pricing from SirsiDynix to get figures to share with effected members.

Other System Updates, Projects, Issues

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

FY25 Audit Ongoing

The FY25 RSA Audit is currently in progress. This is our first audit as an Illinois Intergovernmental Instrumentality which has very different rules and standards than a not-for-profit organization audit.

The November Board meeting will include the finished audit and a live report by the auditors.

Library Holds for Hamilton PL and Camp Point PL

Both these new members are paying full RSA membership fees during their cataloging periods. As full members, they are eligible to place system level holds. RSA staff have updated the training handouts we provided to Union Listing libraries. We'll soon provide the documents and a quick training session to both new members. The RSACat Union List holds page has been updated to include these new members in the selection of hold pickup libraries. There will be an announcement on the email forums to let members know they may start seeing holds from these libraries.

RSACat and RSACat App Online Payment Checks Ready

All the online payments for January – June, plus any library who didn't have \$10 in payments from July – December have been reconciled. I have a pile of checks ready for signing. Those will go out, along with a listing of all online payments and a cover letter, a day or so after the Board meeting.

BLUEcloud (BC) Central Circulation Roll-out

RSA staff have set up Fondulac PL and Henry PL as testing locations. We have created individual users for both libraries and they've begun some testing for us.

As we continue working through the setup process, and to create some training documentation, we continue to find things that are confusing or not helpful. We have a great dialog with SirsiDynix who is working on flowcharts and other documentation to help us with the multiple levels of configuration.

This fall we'll see about setting up 1 or 2 schools for testing. We have one firm volunteer already. 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. These systems are not protected by our library IP based firewall security. We updated both our SPOT (Single Point Of Truth) database and Guru (the RSA Helpdesk which includes member library user contact records) 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. So far, the new processes are working well internally to RSA. This makes thinking about the full roll-out much less stressful.

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 need to contract with Salesforce experts to do this work this fall.

Staff Updates Since the Previous Meeting

Staff Anniversaries

- Kendal Orrison – 20 years in September

Staff Retirement

- Erin Roberts retires on September 2nd. We wish her all the best in the future and have enjoyed working with her these last three years.

Misc Staffing Notes

- Erin's retirement will leave 2 Catalogers doing library visits. Erin's replacement is a lower position to start and will not do site visits by themselves. We will adjust other work levels and continue with our new standard of visiting each member once every 18 months.
- Kendal will meet one-on-one with each RSA staff member in September to outline the new RSA vision and what we'll be expecting. Again, we're not only working with existing staff but laying the foundation for the 25% new staff starting in January. Everyone will have the same expectations. All of this is focused on setting expectations for how RSA supports our members 2, 5, and 10 years from now.

Completed RSA Events: Training & Visits

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

August Events:

Location	Campaign Name	Campaign Type
Odell Public Library	Routine Site Visit	Member Services
Zoom	Basic WorkFlows Cataloging Workshop	Cataloging
Illinois Prairie DPL via Zoom	Basic Patron Registration Workshop	Member Services
Beardstown Houston ML	FY26 New Director Visit	Member Services
Zoom	Basic Circulation Workshop	Member Services
Edwards River Public Library District	Cataloging Site Visit	Cataloging

Zoom	FY26 Holds Workshop	Member Services
Cambridge PLD	Cataloging Site Visit	Cataloging
Pontiac Public Library	Cataloging Site Visit	Cataloging
Astoria Public Library	Routine Site Visit	Member Services
Flanagan-Cornell Grade School	FY26 New Director Visit	Member Services
Winchester CUSD via Zoom	FY26 General Ops visit	Member Services
Galva Public Library District	Cataloging Site Visit	Cataloging
M-C River Valley PL	FY26 General Ops Visit	Member Services
Forrest	Forrest Ops Site Visit	Member Services
Valley District Library	Cataloging Site Visit	Cataloging
Farmington Area Public Library District	Cataloging Drop-In	Cataloging
Dominy ML	Dom Mem Ops Site Visit	Member Services
Normal PL	Drop In Visit w/ NPL	Member Services
John Mosser PLD	FY26 General Ops visit	Member Services
Atkinson PL	FY26 General Ops visit	Member Services
Washington DL	Item Group Editor Training	Cataloging
Colchester District Library	Routine Site Visit	Member Services

Operations Department Report for 4 September 2025

Policy Review

We thought this was a good opportunity to take stock of where we have got to on the review of RSA policy because there has been a lot of work done on this over the last year or so. We wanted to remind you that it is our intention to develop a schedule so that policies can be reviewed on a regular basis of three years for most except for the Freedom of Information policy and the Employee Handbook which will need to be reviewed annually.

Policies fall under three broad categories:

- Governance and Administration – 8 policies no older than July 1, 2024
- Operations – 10 policies, oldest dating from September 2021 which is on the agenda for the September meeting. Of the others none are older than August 2023. That ties in nicely with a triennial review starting in July 2026.
 - Three of the 10 existing policies regard Users and we are working on combining those into a new User Account policy which will be heading to the DAC in October following recent comment from the forum
 - We are still working on a new Item Retention Policy which is not in the current list
- Cataloging (Bibliographic Services) – 7 policies
 - Two of the existing policies regarding Pirated items and ARCS are being combined and expanded into a new Prohibited Items Policy which is on the agenda for the September meeting.

This will leave us approximately 24 policy documents, 22 of which will need looking at once every three years and the remaining 2 every year. This would seem to fit pretty neatly into 8 meetings a year over three years and should mean we can keep the average review each meeting to no more than one or two which hopefully won't be too burdensome.

Item Retention Policy

We once again decided to delay bringing this policy to the board for approval because we decided to take it back to the DAC one more time. We want to ensure that we have the largest opportunity possible to gather feedback on this policy. We will re-present it back to the DAC in October and bring it to the Board in November.

Personally Identifiable Information Policy

This is an update of the [Printed Documents including PII Policy](#) last updated in September, 2021. The requested changes mostly come from continuing to follow the goal of revising policy to only include statements of intent. More importantly, a new paragraph has been added towards the end to add the force of policy to our current requirement that library directors and staff must sign the library and staff PII agreements. We have been requiring these for at least three years as a prerequisite for granting access to reports containing PII in BCA, but this has never been laid out in policy before now. The policy name was updated to reflect this expanded coverage.

BLUEcloud Circulation testing

Both Fondulac and Henry libraries have now started testing BCC for us and are already providing us with some very useful feedback which we are sending onto SirsiDynix for their input. There is a new page on the Support Site for BLUEcloud Circulation where we build out a collection of guides and cheat sheets to support this roll out: <https://support.librariesofrsa.org/project/bluecloud-circulation/>. So far there is just the one cheat sheet on how to get started, but three more are in progress. We intend to pass these onto Fondulac and Henry for feedback before publishing. We have also identified a school library who is interested in using BCC soon, but I need some more information from Sirsi first.

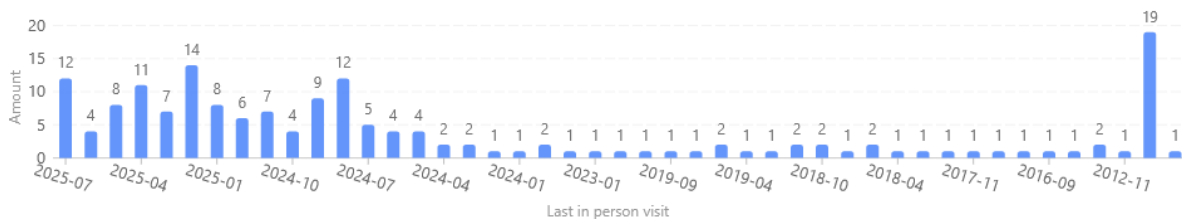
Routine Visits

The Operations Team has started Routine in-person visits with the first round of 24 libraries. They visited 5 member libraries in August as part of this new round of Routine Visits and another 8 visits have been scheduled so far.

As a reminder, the new schedule of routine visits 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.

These charts shows the most recent in-person visit to each member library branch by month that we had documented. Some visit dates have been lost in the either. Most recent visits are to the left.

End of July



also enables us to stop sending out emails to addresses that have been deactivated. Many libraries have recently reported that they are adding informing RSA of staff departures to their offboarding procedures, which is very much appreciated. As more libraries are moved to individual circulation accounts it will also become essential that we are informed as part of onboarding as well.

Cataloging Department Report for 4 September 2025

Brief Record Upgrades

Since the August Board meeting, the RSA cataloging department has upgraded 165 brief records to OCLC records with full bibliographic description.

Erica recently ran a fresh report of brief records with email addresses that need upgrade to OCLC records. There are close to 17,000 brief records that meet this criteria.

Cataloging Site Visits

The RSA cataloging department continued conducting routine, in-person site visits. Since the August Board meeting:

- Erin visited Edwards River Public Library District and Galva Public Library District.
- Jennifer visited Pontiac Public Library and Valley District Library. She also dropped in to visit Farmington Area Library District, scheduling a cataloging site visit there in September.
- Lisa visited Cambridge Public Library District.

Combined, these visits reached 11 library staff for a total of 11.75 hours.

Cataloging Progress for New RSA Libraries

Camp Point Public Library recently worked with Jennifer to customize their WorkFlows item category 4 and 5 drop-down menus to only include those codes they will use for their collection. RSA strongly recommends customizing the item cat 4 and 5 menus to ensure codes are assigned consistently and to make them more helpful for patrons searching the RSACat.

Lisa continues to wait on visiting Hamilton Public Library for cataloging training until their item barcodes have arrived. The barcodes should arrive soon because Antony recently checked the electronic proofs to confirm they are correct.

Construction work continues at the Perry Branch of the North Pike Public Library District. The introductory cataloging meeting will wait to be scheduled until the construction work is mostly finished, and the temporary cataloger has been hired.

Cataloging Training

Lisa taught the Basic WorkFlows Cataloging Workshop on Zoom for six participants on August 7th.

Jennifer's Basic WorkFlows Cataloging Workshop scheduled at Clover Public Library District in September has been moved to Zoom because Clover is unfortunately no longer able to host.

The August Bibload Workshop on Zoom was cancelled due to lack of registrants.

Lisa visited the Main Branch of the Washington District Library on August 27th to provide Item Group Editor training for three participants.

The cataloging department participated in webinars on cataloging electronic resources and AI-generated metadata in OCLC WorldCat.

Other Cataloging Projects

- Erin has been busy tying up loose ends in her workload and will finish her time with RSA on September 2nd. We wish Erin a Happy Retirement!
- Jennifer and Lisa continued cross training each other on cataloging support topics. Topics since the August Board meeting include the resolution of on-order merge errors, a workaround for importing an OCLC record into WorkFlows, and the correction of ISBNs or UPCs on WorkFlows records.
- Lisa learned how to create individual cataloger accounts in WorkFlows. Now both Jennifer and Lisa know how to do this important task, improving response time to the membership when new accounts need to be created.
- Erin and Jennifer finished serving as mentors for iCAMP, the Illinois Cataloging Mentorship Program.
- With input from RSA administration and the cataloging department, Erica drafted the Prohibited Items Policy, a Prohibited Items Procedure if these items are encountered in WorkFlows, and a Guide for Identifying Pirated Items. Once the policy is approved by the RSA Board, it will be linked on the support site, along with the procedure and the guide. Please watch for an announcement about these documents on the Directors, Cataloging, and Cataloging Policy email forums.
- The cataloging department is beginning to think about topics for the next RSA Cataloging Chat on Friday, September 26th at 10:00 am on Zoom. Registration is available [here](#).