

Executive Director Report for 6 November 2025

Membership Updates: Ongoing Topics & One-Offs

Notable Membership Activity

Mason Memorial (former Union List)

- They are fully circulating and filling/receiving holds!
- While they still have some additional cataloging to do, we consider their upgrade complete

Hamilton Public Library – Received RAILS Automation Grant in May

- Lisa provided on-site cataloging training
- They are game planning on how to best add their materials

Camp Point Public Library - Received RAILS Automation Grant in May

- Jennifer provided onsite cataloging training
- They have started cataloging their collection.

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

- They continue to work to complete their new branch buildout. They've run into a series of unexpected delays.
- When they are ready, we will have a cataloging parameters call for branch specific settings
- We may not need to provide basic cataloging training, they already know how and may train up their temp catalogers. We will do onsite training if they request it.

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.**

Timeline & Punch List

- **We are updating and re-updating this frequently now.**
- **Better yet, things are actually being accomplished again!**

IMRF (Illinois Municipal Retirement Fund)

- **RSA was approved for membership!**
- **We can't set anything up in IMRF until 2 January or later**

LIMRiCC

- LIMRiCC rolled out their new rates for calendar 2026. These have been incorporated into the FY27 draft budget.
- Antony has entered all existing staff into the LIMRiCC employee portal in preparation for open enrollment in November
- **We are working with RAILS and HR Fit to determine the best way to handle the HRA (Health Reimbursement Account) program under RSA. RAILS used WEX, we're trying to see if we can do it more effectively ourselves. The HRA option keeps overall healthcare costs down as it allows us to use less expensive, high-deductible plans.**

Bank Accounts

- Finished

Mission Square

- We have passed along our new EIN
- We've reached out to Mission Square to inform them we will not need the 401(a) plan that was our IMRF backup
- We can use, we think, a plugin to integrate Mission Square into Paylocity payroll. That's still TDB due to Paylocity setup.
- We're awaiting their guidance on our next steps.

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 had a meeting with Wyman Group on 10 September to take a holistic look at the new RSA. They are working up options for us on various things.
- We'll be working with them in calendar 2026 to see if joining a local insurance pool would be less expensive overall and provide better options for local providers.

RAILS / RSA IGA's, Property, Etc.

- Antony and Joe Filapek continue to working on the list of things RSA currently owns, or that RAILS will give to RSA, or RSA will purchase from RAILS.
- The RAILS Board will sign an IGA with RSA to finalize the separation agreement. At this time, we are unsure if that will require a special RSA Board meeting in December to approve.

Payroll, Benefits & Mandated Personnel Programs

- Antony is working with Paylocity on payroll and benefits setup. He has taken several training courses and is working with their local representatives to get everything setup.

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 review, edit, and approve an update in January to add in the missing Birthday day off for staff with 5+ years of service and any other Illinois law changes.
- We continue to work with HR Fit to develop all the various HR, Personnel, Benefits, Evaluations, etc. forms.
- 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.
- Interviews start the first week of November. We will run interviews over several weeks of November.

Staff Pay Scale and Job Description Review by HR Source

- 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 paid for a review of this scale and Job Description benchmarking.
- HR Source has provided their first draft, which we commented on. Awaiting their final payscale now. The overall 30-ish% reduction for Peoria Area did not hit as hard as expected. All their benchmarks will be included in the final product. We're comfortable with the pay scale the Board approved in April and can justify it using HR Sources data.
- All job descriptions have been extensively reworked and new levels of responsibility added.
- Entirely new positions were added.
- We await HR Source's comments about the new job descriptions. We may need to adjust some job titles to better fit industry standards (again) and some duties to better reflect the technical nature of our staff's work. These changes will help with future benchmarking.

Computers, Software, IT Infrastructure

- RSA Support Staff can't migrate off RAILS provided systems until the staff cutover.
- Purchasing Office 365 licensing was VERY HARD and even Microsoft didn't understand their own rules. But James figured it out and we're contracted and licensed!
- All staff and the help desk will transition to RSA's email domain "@librariesofrsa.org" as of January 1st
- We are working directly with Lenovo to purchase new laptops (14) and potentially monitors depending on price. We are planning to get the two additional laptops now for equipment consistency and in light of wishing to hire 2 additional staff in the first quarter of 2027.
- RAILS requests laptops and monitors be returned to them as we're able
- We are working to add local phone number inside of O365 Teams. We're currently looking into the process of transferring the RSA 866-940-4083 phone number over to our O365 Teams setup as well. Desktop phones through Teams are price competitive and fully integrated into our new system.
- We do not expect to have a paid Zoom account. We'll move completely to Teams for all our webinar and meeting needs.
- We will be able to continue to use the RAILS printer in East Peoria. That is included as part of the building IT infrastructure.
- We continue to search out any other software that RAILS currently provides that we need to contract directly for.

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

EIN and 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.
- Antony has filed with the State for our Illinois tax number and information. We couldn't do that until 90 days prior to employing staff. We expect to get our IL tax free certificate by the end of November.
- Lawyers are filing additional paperwork now to remove themselves as the responsible party for our new EIN since we aren't required to have one but needed it to get the EIN.

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 RSAcat 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. *This product is not ready for RSA to migrate to now. We continue to monitor SirsiDynix's development progress. (last report until progress is made)*

RSAcac Header Name/Logo Updates

As part of the RSAcat Mobile 2 setup, we are also looking at the existing RSAcat 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 RSAcat profile header name, logo, and colors. Awaiting movement on the Mobile 2 product to do this. *(last report until progress is made)*

RSAcac Online Payments

RSAcac 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. Patrons LOVE online bill pay in the RSAcat Mobile app which accounts for over half of all online payments made. *This is our next big project when Tony has time.*

Hoopla RSAcat Integrations

We are working with member libraries who have Hoopla but do not have Hoopla visible in RSAcat. *We have bulk pricing (around \$100 a year) for this now. Awaiting a chunk of time to work with libraries to move forward.*

eRead Illinois Changes

Due to the unexpected Baker and Taylor closure, we will be removing all eRead IL titles from RSAcat and the RSAcat Mobile app. At this time, The Palace Project, eRead IL's new home, does not have an integration into RSAcat.

Patrons will see messaging via the Boundless app soon. We are working up a short description for the main page text of all the RSAcat profiles and will be swapping the Boundless app links for Palace Project links.

Please watch the RAILS website for the most up-to-date information. We're all working as fast as we can to get The Palace Project team RSA's information to ensure patron go-live on day 1 of the new RAILS eRead collection.

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 complete. RAILS will be running a process for a new auditor for FY26 and later audits.

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. 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 and updates to the membership list/delivery cheat sheet to show the correct user to check items out for holds filled for these two libraries.

BLUEcloud (BC) Central Circulation Roll-out

RSA staff have set up Fondulac PL, Henry PL, and Astoria High School as testing locations. We are currently setting up Unity High School and will be training them soon.

We're finalizing our local training documentation and are awaiting the rollout of the next version in November. The November release has all the print receipt features we needed to push the rollout to more libraries. The November release is the last major functionality release for some time as SirsiDynix shifts to their next big BLUEcloud project. It's 'good enough' for general circ desk tasks and ready for wider roll-out. It is not a full Workflows replacement.

We're setting up additional schools and will find more public volunteers to test things.

Individual User Accounts

We continue to tweak out account issuing and deletion processes as various edge cases are discovered. With so many members it doesn't take long to find a new way to break a process! None-the-less, we're in a good place with these processes to issue, track, manage, and delete individual system accounts.

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 have just signed a support contract with the vendor who helped us set up Salesforce in 2019 to do this work and provide ongoing support. Along with the 25 hours of support time a year, we'll also now have daily data backups of the helpdesk. We looked at Peoria area companies and found a good one, but their support bid was 4x as high with fewer hours and no daily data backups.

Symphony 4.2 Update – February Project

SirsiDynix just released 4.2 at the end of October. Earlier this year we had intended to immediately upgrade and roll this out to you as it has a couple highly requested updates. However, with our current Independence workloads, Antony and I have decided to wait until February to because working on this. It's going to require quite a lot of setup work on our part to enable some of the new features like multiple Workflows Logins having access to the same finished reports.

RAILS LLSAP Support Grant for FY27

Released as I write it update! RSA's grant amount is down by the amount we suspected, \$799,940.15 with RSA's rent, building infrastructure, and finance support reducing that amount by \$97,822.31.

Staff Updates Since the Previous Meeting**Staff Anniversaries**

- Jennifer Choat – 6 years in December

Misc Staffing Notes

- All staff are remaining with RSA and are excited for our future.

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
New Windsor PLD	Cataloging Site Visit	Cataloging
Flanagan Public Library	Routine Site Visit	Member Services
Henderson County PL	September 4 2025 Board Meeting	Governance
Washington Community HS	FY26 General Ops Visit	Member Services
Zoom	Online Basic WorkFlows Cataloging Workshop	Cataloging
Mason Memorial District Library	Basic Patron Registration Workshop	Member Services
Zoom	FY26 Holds Workshop	Member Services
Lexington PLD	FY26 General Ops Visit	Member Services
Pekin PL	Pekin PL Ops Site Visit	Member Services
Bushnell PLD	Cataloging Site Visit	Cataloging
Farmer City PL	Farmer City Ops Site Visit	Member Services
Farmington Area Public Library District	Cataloging Site Visit	Cataloging
Zoom	Basic Circ Workshop	Member Services
El Paso Public Library	Routine Site Visit	Member Services
Gridley Public Library District	Cataloging Site Visit & Item Group Editor Training	Cataloging
Gridley Public Library District	Item Group Editor Training	Cataloging
Williamsfield PLD	Cataloging Site Visit	Cataloging

Maquon PL	Maquon Ops Site Visit	Member Services
Abingdon-Avon HS	FY26 new Director Visit	Member Services
Zoom	RSA Cataloging Chat	Cataloging
Dunlap PLD	FY26 New Director Visit	Member Services
Hamilton PL	Basic WorkFlows Cataloging Workshop	Cataloging
Neponset PL	Neponset Ops Site Visit	Member Services
Havana PLD	Cataloging Site Visit	Cataloging
Zoom	Basic Patron Registration Workshop	Member Services
Ransom ML	New Director Visit	Member Services
Bradford Public Library District	Routine Site Visit	Member Services
Zoom	FY26 Holds Workshop	Member Services
Peoria Heights PL	Cataloging Site Visit	Cataloging
Mason Memorial Lib	FY26 Holds Workshop	Member Services
Zoom	Basic Circulation Workshop	Member Services
Mt. Hope Funks Grove PLD	FY26 new Director Visit	Member Services
Galesburg PL	Cataloging Site Visit	Cataloging
Virginia HS	FY26 Training	Member Services
Lexington PL	FY26 Holds Training	Member Services
Virginia Memorial Public Library	Routine Site Visit	Member Services
Greig ML	Greig Mem Ops Site Visit	Member Services
Zoom	Basic WorkFlows Cataloging Workshop	Cataloging
Salem TPL	FY26 Routine Visit	Member Services
Galesburg PL	Galesburg PL Drop In Visit	Member Services
Spoon River College	New Director Visit	Member Services
Deer Creek DL	Cataloging Site Visit	Cataloging
Chatsworth Area Library	Routine Site Visit	Member Services

Cataloging Department Report for 6 November 2025

Brief Record Upgrades

Since the September Board meeting, the RSA cataloging department has upgraded 167 brief records to OCLC records with full bibliographic description. The department is upgrading fewer brief records due to being short-staffed, and routine, in-person site visits are the primary focus.

Cataloging Site Visits

Since the September Board meeting, the RSA cataloging department has conducted routine, in-person site visits at these libraries:

- Jennifer visited New Windsor Public Library District, Farmington Area Public Library District, Gridley Public Library District, Havana Public Library District, and Galesburg Public Library.
- Lisa visited Bushnell Public Library District, Williamsfield Public Library District, Peoria Heights Public Library, and Deer Creek District Library.

Combined, these visits reached 19 library staff for a total of 22.25 hours.

Cataloging Progress for New RSA Libraries

Since completing basic cataloging training with Jennifer in late July, Camp Point Public Library has cataloged 677 items in WorkFlows.

On October 1st Lisa visited Hamilton Public Library in-person to provide basic WorkFlows cataloging training for four staff.

Erica reached out to North Pike Public Library District in late October for an update on the Perry Branch. The new roof was installed earlier this fall, and work is beginning on the building interior, including electrical, renovation of the kitchen and restrooms, and mold removal. The introductory cataloging meeting will be scheduled once this work is mostly finished.

Cataloging Training

Jennifer taught the Basic WorkFlows Cataloging Workshop on Zoom for five participants on September 9th. Lisa taught this same workshop on Zoom for six participants on October 24th.

Jennifer combined a routine cataloging site visit with Item Group Editor training at Gridley Public Library District on September 17th. One participated in the training.

Erica's October 23rd in-person Bibload Workshop at Odell Public Library District was cancelled due to lack of registrants.

The cataloging department participated in webinars on Dewey Decimal Classification, OCLC WorldCat validation, and AI in the library world. Lisa attended OCLC Day at Harper College on October 29th.

Other Cataloging Projects

- Jennifer and Lisa finished cross training on cataloging support topics. Topics covered since the September Board meeting included what to do when a library requests the addition of Homosaurus subject and genre headings to a record, as well as troubleshooting issues with loading OCLC records into WorkFlows.
- The RSA Cataloging Chat was held on September 26th on Zoom. Nine staff from seven libraries participated. Erica launched a survey on October 14th on the Cataloging forum to help determine the future of the Chats now that RSA has been conducting them for a year. There have been 29 responses so far. The survey closes on November 7th and will be announced one more time on the Cataloging forum.
- As part of a panel with Champaign Public Library, CARLI, and Cataloging Maintenance Center staff, Lisa presented at the Illinois Library Association conference on October 14th. The session was titled “Peek Behind the Technical Services Curtain: Cataloging for Non-catalogers.” The session was a success, with 70-80 attendees!
- Erica drafted the AI-Generated Items Policy, which will be presented to the Board for approval at this meeting. Each library will decide if AI-generated items will be included in their collection, but if any content in these items violates copyright, they cannot be cataloged in WorkFlows because the items would be considered pirated. Cataloging pirated items in WorkFlows violates the [Prohibited Items Policy](#).
- At this meeting, the Board will be asked to rescind the Policy for the Elimination of the AV Item Types approved by the RSA Users Group on December 4, 2014. This policy is no longer relevant, as items are no longer assigned the AV, AV-L, or NEW-AV item types. RSA will work with SirsiDynix to verify AV, AV-L, and NEW-AV are not selectable in any libraries’ item type menus in WorkFlows.
- Erica has begun revising the Bibliographic Database Standards, which were last updated in 1999. The revised standards will be shared with the Cataloging Policy forum, the Directors Advisory Committee, and the Board for review once they are ready.
- Jennifer created a short video about pirated items, including characteristics to look for and what to do if a library encounters a pirated item in WorkFlows. Please be on the lookout for the video on the Directors and Cataloging forums, as well as on the RSA Youtube.
- Lisa submitted a proposal for another networking session for cataloging staff at RSA Day 2026, this time with origami. The session titled “Craft Catalogers: A Networking Event” was approved!
- RSA now has an automated WorkFlows report in place that runs each Sunday evening, batch editing items assigned blank or unknown values for item categories 4-10 to undefined. Items should never use blank or unknown item cats because those values prevent accurate collection statistics.
- RSA is undertaking a cleanup project to remove groups saved in the Item Group Editor that are no longer needed in order to free up space for newly created groups. Erica reached out to six libraries to ask their help reviewing groups created longer than a year ago to decide if the group should be kept, or if it can be removed. Erica has heard back from three of the libraries that their groups are no longer needed. On November 10th, any groups older than one year will be removed from the Item Group Editor if the library has not asked RSA to keep the group.
- HR Fit, Antony, Kendal, and Erica will conduct interviews for the Bibliographic Services Specialist position on November 4th and 5th.

Operations Department Report for November 6, 2025

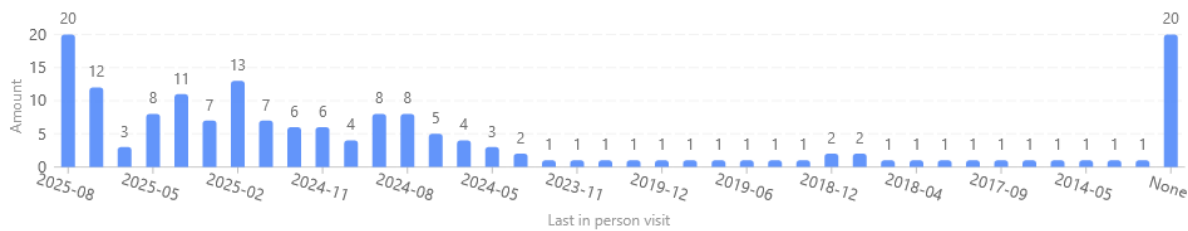
Routine Visits

The Operations Team continues to make routine in-person visits with the first round of 24 public libraries. A total of 21 of the 24 libraries have been visited since we started this in July. The other three will be completed before the end of the year. In November we will be allocating team members to each of the school libraries due to be visited starting in January.

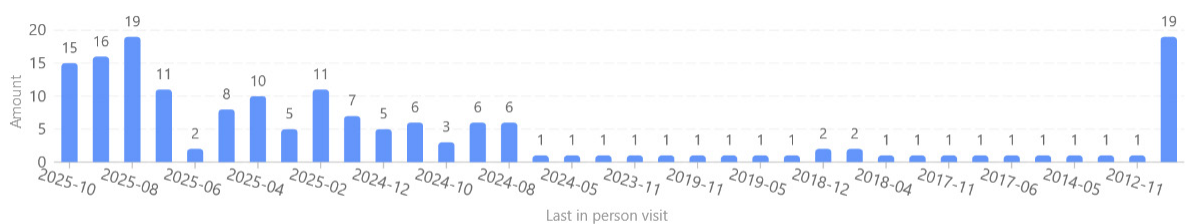
As a reminder, the new schedule of routine visits means each library will be visited in person every 18 months and will have a Cataloging and Operations team visit every 3 years. Libraries have been organized into visit groups based broadly on the length of time since their last in-person visit.

These charts show 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 ether. Most recent visits are to the left.

End of August



End of October



Policy Review

If the board decides to approve the draft policies on the agenda described below that will complete the review of Operations-side (non-cataloging) Policies. It is our intention to develop a three-year review cycle in cooperation with Erica. That cycle would start in July 2026. The policy review work that the Board has undertaken since the establishment of the III has been significant and we wanted to take the opportunity to acknowledge that.

As a reminder, policies fall under three broad categories:

- Governance and Administration – 7 policies no older than July 1, 2024

- Operations – 10 policies, oldest dating from August 2023, a replacement for which is on the agenda for the November meeting. Three of these ten will be combined should the board approve the draft User Card Policy in November.
- Cataloging (Bibliographic Services) – 6 policies
 - We are asking the board to approve a new policy on AI generated items and to rescind one on AV Item Types at the November meeting.

This will leave us approximately 21 policy documents, 19 of which will need review once every three years and the remaining 2 every year. This would seem to fit neatly into eight meetings a year over three years and should mean we can keep the average review for each meeting to no more than one or two.

Database Records Item Retention Policy

Since we discussed this policy with you last, we decided that it made sense to combine this draft policy which covers bills, holds, and items with the Retention Schedule for Expire Patrons policy to cover all elements of the RSA catalog and circulation database in one policy document. The section of this draft policy covering user records is the same as the predecessor policy as we are not suggesting any changes to the schedule, only a combination of existing policy with new, expanded language.

User Accounts Policy

This is a combination of three existing policies, namely the Patron Registration Policy, the Patron Cards policy, and the Patron Notes Policy. Combining these three policies follows our recent efforts to simplify policy language and remove language from policies that does not speak to the intent of the board. The biggest difference between this draft and the predecessor policies is that we have been careful to elucidate each of the exceptions to the One Card per person rule. Some of these exceptions were previously in policy, while some were only exercised in practice. It is hoped that this draft makes very clear what all the exceptions are. Assuming this policy is approved then other subordinate documents will be updated. We recently worked to combine four documents into a User Profiles Guide. This guide would be upgraded to a Standard once this draft policy is updated. A User Registration Standard is in place for Public, Academic, and Special Libraries and another for schools. These have recently been updated. Overall, the number of documents covering Library Users will have been reduced from 46 to approximately 29. We hope that this will make it much easier to find the information that staff at member libraries are trying to find.

BLUEcloud Circulation testing

Fondulac and Henry public libraries as well as Astoria High School have been testing BCC for us and continue to provide 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 are three guides and a cheat sheet on how to get started, but we will be adding another shortly. We are also working actively with Unity High School to have them start testing BCC for us. BCC is due to be updated to

version 25.06 sometime in November. We will do more work on receipts, hold wrappers, and other print customization once this update is delivered.

Staff turnover at member libraries

We'd like to provide another reminder that it is **essential** that member libraries inform us when their staff leave so that we can quickly deactivate their accounts and secure our systems. It 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.