Executive Director Report for 8 January 2026

Membership Updates: Ongoing Topics & One-Offs

Notable Membership Activity

Hamilton Public Library – Received RAILS Automation Grant in May
- Lisa provided on-site cataloging training
- They had some staff issues that delayed their start of cataloging
- 20 January supplemental site visit focused on cataloging.

Camp Point Public Library - Received RAILS Automation Grant in May
- Jennifer provided onsite cataloging training
- They are 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.

Post RIP Updates

We have pulled the RIP cord (so to speak) and are now fully* independent from RAILS.
    *Except for all the stuff we haven't completed yet. But from their point of view, we're independent.

Finished:
- Healthcare, Benefits, etc.
- Hire 3 new staff members
- Transition of RSA staff over to RSA direct employment
- 3 new staff members started
- Order new laptops
- New emails (@librariesofrsa.org) live
- Migrate staff emails from RAILS system to RSA's system
- New phone system
- New local phone numbers
- New teleconferencing system
- New chat system
- Gas cards for 2 vehicles
- Lots of minor things

Mostly Finished:
- New software packages

- O365 Migration – moving our files from RAILS to RSA has proved difficult and time consuming
- Payroll – don't know if it'll work until 1st payday on Jan 16th
- Out-processing from RAILS

In Progress:
- Transfer vehicles from RAILS to RSA (awaiting RAILS Board action)
- Vehicle insurance
- 866 toll free number port from RAILS to RSA
- IMRF setup – couldn't start until January
- MissionSquare setup in Paylocity
- Checking to see if we need additional insurances
- Migrating everything that 'assumes' RSA is actually RAILS and is messed up for billing, emails, mailing addresses, and more
- RSA specific policies & procedures to supplement the handbook
- Creating, updating forms and other documentation on RSA internal letterhead
  - HR Fit is helping us rework all our internal documents from RAILS to something more focused on RSA's needs
- Setup work from home agreements for existing staff, 1 day a week

ToDo:
- Replace all monitors
- Look into additional software packages
- Log into every account on every website, product, vendor, etc. to change from RAILS to RSA email address
  - All staff members need to do this for all their accounts
- Transfer 2 mobile data SIMs from RAILS account to a new RSA account
- Everything we didn't know we needed to do. We're finding more every day!
- As a Director, who approves your timesheet and time off requests? Antony and I are trying to figure out who should do this for my entries.

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.

RSAcat 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. We continue to monitor SirsiDynix's development progress. (last update until progress is made)

RSAcat 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 update until progress is made)

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. 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
The Palace Project is live for all Public libraries. We're not fully updated on the status of schools.

Palace Project does not have an integration into RSAcat. We are looking to see if there is an alternative way to do a metadata import to at least make the titles visible.

Please watch the RAILS website for the most up-to-date information.

Other System Updates, Projects, Issues

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

BLUEcloud (BC) Central Circulation Roll-out
RSA staff have set up Fondulac PL, Henry PL, and Astoria High School as testing locations. We have now trained and put live Unity High School, Normal PL, Henderson Country PL, Quincy PL. The three public libraries needed BC Circ to replace the loss of access via AnyConnect for their mobile vans or outreach. We're setting up additional schools and will find more public volunteers to test things.

BC Circ is now 'good enough' for general circ desk tasks. It is not intended to be a full Workflows replacement. Various minor annoyances and functionality bits will come in future updates.

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

We are working with our contracted support company to get our Salesforce instance updated to all the newest methods of doing things. This work is currently ongoing.

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. It's going to require quite of 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. Working to get this scheduled at a convenient time and date.

Staff Updates Since the Previous Meeting

Staff Anniversaries
- Tony Hahn – 5 years in January
- Laura Spires – 1 day as of 5 January
- Mason Tribley - 1 day as of 5 January
- Zac Montgomery – 1 day as of 5 January

Misc Staffing Notes
- We have a lot of training to do for both existing and new staff. We've switched a lot of the things existing staff use on a daily basis so we're all starting from scratch in many ways.
- The 3 new staff members will start their position specific training ASAP.

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
Camp Point PL	Camp Point Ops Site Visit	Member Services
Ransom Memorial PL	Cataloging Site Visit	Cataloging
Toulon PLD	Cataloging Site Visit	Cataloging
Carlock PLD	Cataloging Site Visit	Cataloging
Kewanee PL	New Director Visit	Member Services
Clover DL	Drop In Visit	Member Services
Pontiac PL	Tri-County Directors meeting	Administration
Creve Coeur PLD	Cataloging Site Visit	Cataloging
Brimfield PLD	Cataloging Site Visit	Cataloging
Forman Valley PLD	Routine Visit	Member Services
Henderson County PL	BC Circ Training Visit	Member Services
Quincy PL	BC Circ Training	Member Services
Hudson Area PL	Basic Circulation Training	Member Services
Normal PL	Item Group Editor Training	Cataloging

Normal PL	Cataloging Site Visit	Cataloging
Nauvoo PL	New Director Visit	Member Services
Mackinaw DPL	Cataloging Site Visit	Cataloging
Online / Zoom	Basic Patron Registration Workshop	Member Services
Zoom	Online Basic WorkFlows Cataloging Workshop	Cataloging
Unity High School CUSD	BC Circ Training Visit	Member Services
Zoom	Basic Circ Workshop	Member Services
Normal PL	BC Circ Training	Member Services
Zoom	Holds Workshop	Member Services
Rushville PL	Routine Visit	Member Services
Clover PL	New Director Visit	Member Services
Fondulac DL	Basic WorkFlows Cataloging Workshop	Cataloging
Chillicothe PLD	Item Group Editor Training	Cataloging
Kewanee HS	New Director Visit	Member Services
Henderson County PL	New Director Visit	Member Services

Bibliographic Services Department Report for 8 January 2026

Brief Record Upgrades

Since the November Board meeting, the Bibliographic Services Department has upgraded112 brief records to OCLC records with full bibliographic description. As mentioned in the November report, the department is upgrading fewer brief records. Routine, in-person site visits, along with the database maintenance conducted after them, continue to be the department's primary focus.

Cataloging Site Visits

The Bibliographic Services Department completed all of its routine, in-person site visits for 2025. Jennifer and Lisa conducted six visits since the November Board meeting:

- Jennifer visited Carlock Public Library District, Brimfield Public Library District, and Mackinaw District Public Library.
- Lisa visited Toulon Public Library District, Creve Coeur Public Library District, and Normal Public Library.

Combined, these visits reached 14 library staff for a total of 12.5 hours.

Jennifer and Lisa have begun scheduling with 27 school libraries they will visit between January and May 2026.

Cataloging Progress for New RSA Libraries

Since completing basic cataloging training in late July, Camp Point Public Library has cataloged 1,500 items in WorkFlows, 690 of which were cataloged since the November Board meeting.

Hamilton Public Library completed basic cataloging training in early October, but they have not started cataloging due to unforeseen factors. Lisa plans to visit on January 20th for hands-on cataloging practice with the staff, providing a refresher of the process and confidence to begin cataloging.

Construction work continues on the new Perry Branch at the North Pike Public Library District. The introductory cataloging meeting will be scheduled once this work is mostly finished.

Cataloging Training

The Basic WorkFlows Cataloging Workshop that Jennifer was scheduled to teach on Zoom in November was rescheduled to December 10th due to WorkFlows connectivity trouble caused by the firewall. Three participated in the rescheduled workshop.

Jennifer taught the Basic WorkFlows Cataloging Workshop in-person at Fondulac District Library on December 16th for two participants, both from Peoria Public Library.

Lisa combined a routine cataloging site visit with Item Group Editor training at Normal Public Library on December 8th. Three participated in the training.

Lisa visited Chillicothe Public Library District for Item Group Editor training on December 18th. Three participated in the training.

Erica's December 9th Bibload Workshop on Zoom was cancelled due to lack of registrants. This workshop will shift from bimonthly to quarterly in the New Year in response to low registration.

The Bibliographic Services Department participated in webinars on speaking to leadership, authority control, generative AI and the library collection, and digitization projects.

Other Cataloging Projects

- The 2026 Bibliographic Services Department theme will be getting the new Bibliographic Services Specialist up to speed and determining the additional cataloger position that will be hired in FY2027.
- The survey to determine the future of the RSA Cataloging Chat closed on November 7th with 36 responses. The majority of respondents prefer the hybrid (online and in-person) meeting format, although most of those who chose this option indicated they do not have time to attend, or they watch the recording. The frequency of the Cataloging Chat in January, May, and September was considered just right by most respondents. The majority also found the content to be helpful. RSA plans to host the next Cataloging Chat online in February because January will be busy with the independence transition. The May Cataloging Chat will be hybrid, with RSA asking for a library with ample meeting and parking space to volunteer hosting. The September Cataloging Chat will be recorded only. Offering one Chat in each format will help RSA determine which format actually works best for the membership because survey results showed support for each format.
- In response to feedback from the Board at their November meeting, the Prohibited Items Policy has been revised to include mention of AI-generated items if their content violates copyright. This revised policy was shared with the DAC at their December meeting, which they agreed to forward to the Board for approval at this meeting.
- The New Materials Item Types Policy and the New Materials Item Types Standard have been revised to ensure the correct information is mentioned in the policy versus the standard. Wording was reworked for easier comprehension, and obsolete information was removed. Both the New Materials Item Types Policy and the New Materials Item Types Standard will be shared with the Board at this meeting. The Board will decide if they will approve the revised policy or recommend it for review first by the DAC and the Cataloging Policy forum.
- Erica finished revising the Bibliographic Database Standards and shared a draft with Antony and the Bibliographic Services Department for feedback. Once the necessary revisions have been made in response to internal feedback, the standards will be shared with the Cataloging Policy forum, the Cataloging Chat in February, the DAC in March, and the Board in April.
- Lisa, along with a panel of Champaign Public Library, CARLI, and Cataloging Maintenance Center staff, will be presenting the session "Peek Behind the Technical Services Curtain: Cataloging for Non-catalogers" at the Reaching Forward South Conference in April 2026. This session was a success at the Illinois Library Association conference last October. The

panel is looking forward to presenting it at another conference to reach different library staff.

- RSA has been working with SirsiDynix to develop a new WorkFlows report called Remove Orphaned Serial Controls. This report removes serial controls where the library that entered the control no longer has any items attached to the record. In many instances, removing the serial control will allow the discarded last item to be removed from WorkFlows. This report needs additional testing before it is scheduled to automatically run on a monthly basis.
- The [Cataloging At-A-Glance Cheat Sheet](#) has been updated to include Basic WorkFlows Cataloging and Bibload Workshops scheduled through the first quarter of 2026. The date for the next Cataloging Chat is mentioned on the cheat sheet but not yet posted on L2 because registration will be conducted through Microsoft Teams, which will be set up as part of the RSA independence transition.

# Library Services Department Report for January 8, 2026

Routine Visits

The Operations Team completed their routine in-person visits with the first round of 24 public libraries. School libraries have been allocated to the team, and those visits will start later 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 Bibliographic Services and Library Services 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
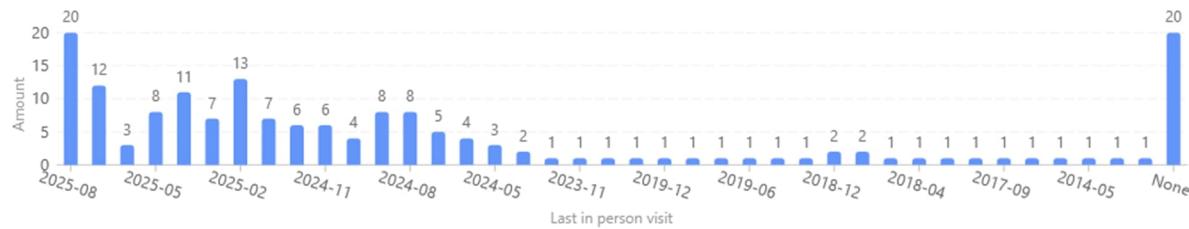
End of December
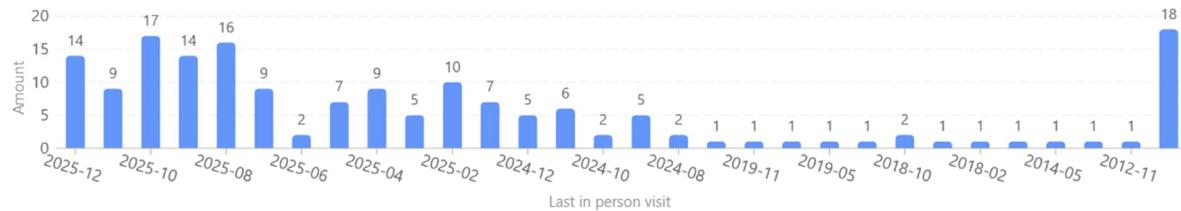
Policy Review

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, I took it back to the DAC as requested where they recommended the draft that's on the agenda for this meeting. It was brought up that perhaps 3 years was a long time for something to be left in MENDING, but that it wasn't enough of a concern for them.

Prohibited Items Policy

The Prohibited Items policy was also presented to the DAC at their last meeting. They recommended the text on this meeting's agenda.

New Materials Item Policy and Standard

Erica has prepared a new draft of the New Materials Item Types policy. This draft has been prepared using our recent methodology to ensure that policies only contain statements of the board's intent. The accompanying standard does not need approval of the board but is presented to show how the policy and standard work together.

BLUEcloud Circulation testing and roll out

Fondulac and Henry public libraries as well as Astoria High School have been testing BCC for us for some while and continue to provide us with some very useful feedback which we are sending onto SirsiDynix for their input.

In addition, BCC has been rolled out to Unity High School and to Quincy, Normal and Henderson County public libraries for their outreach programs to replace AnyConnect. We have a list of 12 other libraries lined up for late winter rollout, most of whom used AnyConnect for some kind of outreach work, but who reported they needed a replacement less urgently. The team will start reaching out to them early in the new year.

There is a new page on the Support Site for BLUEcloud Circulation where we are building out a collection of guides and cheat sheets to support this roll out: https://support.librariesofrsa.org/project/bluecloud-circulation/. So far there are four guides and a cheat sheet on how to get started, but we will be adding another shortly.

BCC was updated to version 25.06 sometime in November. Print customization for the current and future BCC sites will also be worked on in the new year.

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.