



DIRECTORS ADVISORY COMMITTEE (DAC) AGENDA

Wednesday, October 14, 2026, | 1:00 PM

Alpha Park Public Library

3527 S. Airport Rd., Bartonville, IL 61607

Member & Guest Attendee Teams Registration Link:

<https://teams.microsoft.com/meet/231480005970103?p=bUwK0elaHqX1QEWGRE>

1. Welcome and Call to Order – Chair
 - 1.1 Roll call of DAC members at meeting location – Note Taker
 - 1.2 In-person quorum: adopt motion allowing members to participate via Teams if they meet
OMA rules preventing physical attendance (action requested) – Chair – *Roll Call Vote*
Teams participation members and sites: **None**
 - 1.3 Roll call of DAC Members participating via Teams – **None** – Note Taker
2. Recognition of guests, public comments, and announcements – Chair
 - 2.1 In person
 - 2.2 Online in Teams
3. Agenda adoption (action requested) – Chair
4. Approve DAC meeting minutes from 8 July (action requested) – Chair
5. Reports & Member Library Topics
 - 5.1 Chair's Report & New Taskings from the Board of Directors – Chair
 - 5.2 RSA Report – ED
 - 5.3 Submitted Discussion Topics from the Membership (discussion)
6. Unfinished Business
 - 6.1 Ongoing mandatory in person member visits update (discussion) – ED / AED
 - 6.2 Standardized No-Transit item types update (discussion) – ED
7. New Business
 - 7.1 Harmony Project: Clean Up, Clarity, Standardization – introduction and explanation of scope (discussion) – AED
 - 7.2 RSA Directors Day – follow up (discussion) – AED
 - 7.3 Strategic Plan update including Member Summit location (discussion) – AED
 - 7.4 Leadership Transition Plan update (discussion) – Board President
8. Committee Development (discussion) – Chair
 - 8.1 Committee Member comments and talk about projects in your library
 - 8.2 Guest comments and talking about projects in your library
9. Chair's Time, Additional Public Comments, Agenda building for 9 December 2026 – Chair
10. Adjournment – Chair

FINAL VOTE OR ACTION MAY BE TAKEN AT THE MEETING ON ANY AGENDA ITEM SUBJECT MATTER LISTED ABOVE, UNLESS THE AGENDA LINE ITEM SPECIFICALLY STATES OTHERWISE.

Future FY27 Meeting Dates:

9 Dec 2026 Kewanee Public Library
10 Mar 2027 Washington District Library



**DIRECTORS ADVISORY COMMITTEE (DAC)
MINUTES - DRAFT**

Wednesday, July 8, 2026 | 1:01 PM
Galesburg Public Library
264 W Main St, Galesburg, IL 61401

1. Welcome and Call to Order [Chair – Genna Buhr]

1.1 Roll call of DAC members at meeting location [Note Taker]

Genna Buhr - present
Bobbi Mock - present
Alissa Williams - present
Randall Yelverton - **absent**
Rachel Ballenger - **absent**
Noelle Thompson – present

1.2 In-person quorum: adopt motion allowing members to participate via Teams if they meet OMA rules preventing physical attendance (action requested) [Chair]

Motion to Allow Members to Participate Via Teams Be Approved

Motion by B. Mock, seconded by A. Williams

Voice vote called: **Motion carried by unanimous vote**

1.3 Roll call of RSA Board Members participating via Teams [Note Taker]

Rachel Ballenger – present

2. Recognition of guests, public comments, and announcements [Chair – Genna Buhr]

2.1 In person

Kendal Orrison, Antony Deter, Laura Spires
Amy Harris – Alpha Park Library
Alyce Jackson – Chillicothe PLD
Jamie Beil – John Mosser Public Library
David Eckert – Kewanee PL
Beth Duttlinger – Lillie M. Evans Library District

2.2 Online in Teams

Maria Ford - RSA
Lori Urban – Heyworth PLD

Lexie Walsh – Washington District Library
Amber Strub-Lay – Camp Point PL
Greg Weydert – Creve Coeur PL
Amy Gee – Carthage PL
Rebecca Seaborn – Farmington PL

Public Comment: Carthage PLD – closing July 15 – 29 to move into their new location.

3. Agenda adoption (action requested) [Chair – Genna Buhr]

Motion to Adopt Agenda

Motion by A. Williams, seconded by B. Mock

Voice vote called: **Motion carried by unanimous vote**

4. Approve DAC meeting minutes from 11 March (action requested) [Chair – Genna Buhr]

Motion to Approve DAC Minutes from 11 March

Motion by B. Mock, seconded by A. Williams

Voice vote called: **Motion carried by unanimous vote**

5. Reports

5.1 Chair's Report & New Taskings from the Board of Directors [Chair – Genna Buhr]

- Genna asked the RSA Board at their last meeting if the president of the Board must chair the DAC. The answer is no. It would be beneficial to have someone else chair this committee.
- Bobbi cannot be the DAC Chair because she is also a board member.
- We need someone to represent schools on the DAC. Genna decided to have this meeting without the school representative. The search for a representative will be picked up when school library directors are back in their buildings.
- Kendal clarified the Board does not run this committee. The intent is to “spread the love.”
- Kendal hopes whoever is running this committee should hear more discussion points bubbling up.
- The newly elected chair may attend the board meetings, or file and submit a report from the DAC.

6. Election of new DAC Chair

Nominations for new DAC chair:

- Kendal wants to get new viewpoints on the committee.
- Rachel said she has a hard time getting to the meetings and does not believe she would be a good choice for DAC Chair.
- Bobbi nominated Alissa Williams as DAC Chair. Genna called a vote; the vote was unanimous to have Alissa as the new DAC Chair.

7. Reports

7.1 RSA Report (ED)

- Reports were included in the DAC Agenda packet.
- AC Central dropped one elementary school.
- Bushnell-Prairie City was the last union lister. They were using a third-party product for circulation. They felt they couldn't afford to continue using RSA.
- Illini Bluffs withdrew their remaining building.
- Fulton County did not withdraw in time.
- Spoon River Valley added a second branch (elementary school). RSA worked with them to set up the new branch in WorkFlows. RSA has been able to help with transfer of materials from the HS to the new building.
- The Independence Project is finished!

8. Unfinished Business

8.1 Individual Circulation/BLUEcloud Circulation and Cataloging accounts update (discussion) [AED]

- BCC roll out – 24 libraries have been set up. Fondulac volunteered to break the system for us.
- All feedback received has been sent to Sirsi.
- A couple of things Nick asked for have already been implemented.
- Twenty-four libraries are using it to some extent. Astoria and Unity High Schools are using it for nearly everything. Some libraries are using it for outreach.
- We have set up 140 individual circulation accounts.
- Sirsi has web-based WorkFlows, but it costs \$100.00 per user. Kendal reports it is not great at knowing who or where you are in terms of configuring, and you must manually set it up every time you log in.
- There is an option in BCC for single sign in, but it is not turned on yet because not enough people are using it.

8.2 Standardization: 2027 there will be either a partial system migration OR in-place migration Symphony to Symphony. Opportunity for standardization. Importance of role of DAC (discussion) [AED]

- We are preparing for a migration to either a third-party system or a migration to a new Symphony database. This has been discussed in the last several Board and DAC meetings.
- Antony promised to come up with a design concept for overdue fine structures. The current version of WorkFlows has 271 overdue fine structures, of which we are only using 35.
- When we move to a new system, we would only create the fine structures needed.
- Surveys were sent out to determine which bill structures would be needed in the future.
- Of the 130 member libraries, 34 libraries charge fines across the board and nine charge for certain items (hotspots, etc.).
- The goal is to offer a menu of standard overdue fines and a chart that is readable. Conversations will be had with every library. No work will be done prior to migration.
- Some libraries have already approached RSA about wanting to change their fine structure.

8.2.1 Review of what we learned from another consortium

- Migrations take from 14-16 months to complete.
- The consortium in Ohio (SEO) Kendal and Antony observed is similar to RSA.
- One of the pillars of the new strategic plan may be migration.
- The reporting RSA has now is not matched by any other system.
- Sirsi is behind on patron interfaces. There are a couple of online staff clients that look good but would require rethinking.
- Aspen is open source and has improved over the last two years. The new Vega catalog from Innovative also looks nice. Vega was impressive, Polaris was gorgeous and did fun things, and Koha was a little clunky.
- Canned reports were fine, but once you moved beyond the canned reports it wasn't good.
- Sierra is more of an academic product.
- We must be migrated by June 30, 2027.
- We will do an environmental scan. We want to know what patron interfaces will be like in three years.

8.2.2 Standardization candidate: overdue bill structures and review of survey results

- One of the survey questions was: should a cap be set for the fine of an item. Items go lost after 90 days. Our current fine structure is useless.
- The data from the second survey indicates we should only need five or six bill structures.

8.3 Ongoing mandatory in person member visits update (discussion) [ED/AED]

- The next round of mandatory site visits has started.
- There are 62 branches in total for this round with four staff members covering the assigned libraries.
- Visits should be completed by the end of the calendar year.
- The amount of data collected and the amount of assistance provided at in-person visits is remarkable. The parameters parties created 700 ticket items.

8.4 Standardized No-Transit item types (discussion) [ED]

- Sirsi had to re-do the entire hold system to get this.
- We have to build item types to use this feature.
- There is a cascade of places where the item types need to be for reporting. The categories are specific, but not too specific.
- These things will not circulate to any other library. The item can only be picked up at the owning library. We must retrain patrons to understand this.
- We came up with a new brief record item for these items. When you catalog a no transit item, the brief record item title should indicate where the item can be checked out and picked up.
- If this works, we can begin rolling it out library by library.
- Our cataloging department will need to provide assistance with rolling this out.
- There should be a big note on the item or container that the item must be returned to the owning library.
- We need to write documentation from scratch.

8.5 Location codes, item cats 4 & 5 (discussion) [ED]

- When we think about a new system, there is an opportunity to think about Item Cat 4 and 5 because of the way 4 and 5 have needed to be super flexible.
- Erica suggests using Item Cats 7-10 to divide some of this out so Item Cats 4 and 5 can be structured in the way they were originally intended.
- Downside: Item Cats 7-10 are not currently configurable, nor are they easily reportable.
- Erica's explanation is that it is not supposed to be a duplication of the subject headings. It is a classification in a patron-friendly way.
- Beth Duttlinger would like to talk to other libraries before we expand.

9. New Business

9.1 Documentation Updates – updates to YouTube videos and Bibliographic Services Department documentation (discussion) [AED]

- This is an ongoing process. These are being replaced with uniform branding.

9.2 Data Project (discussion) [AED]

- There is a write-up from Erica in the meeting packet. It includes a brief record cleanup. She has put a lot of thought into how to mitigate this.
- Parts 1-4 explain we are working with Sirsi. That project has been done to the test survey. The test found 270k records to add. The idea for doing that was to make the records better.
- Stages 2-4 should be more successful. We will do it in production when it can be scheduled for a Sunday.
- Of the 58k records, 28k do not have a match point.
- Boston PL has an open source tool of ISBNs to interrogate OCLC.
- We can't require a standard number.
- If the item has an ISBN, and it isn't being put in the record, it prevents us from doing the work.
- We are considering sending libraries a list of brief records with non-standard numbers.
- It needs to be communicated to everyone to use the standard number or we won't have the match point.
- The point of doing this is discoverability and reciprocity. Those are core principles of RSA.

9.3 RSA Directors Day – call for any more ideas – schedule to be finalized mid-July (discussion) [AED]

- Forty people are registered as of 7/8/2026.
- **Topics:** opening introduction, introduce the strategic plan, a speaker from RAILS to discuss the difference between RSA and RAILS, BNA process, differences with municipal libraries, Laura Keyes from the state library will present on IPLAR, Kendal and Mason will present on reporting, Maria Ford will present on the RSA Support Site, Antony will present on migration and standardization. We might do something on BCC updates. There will be a networking session.
- IMRF have been invited to set up a table.
- A friend of Antony's runs a charity that fundraises through role-playing games. He may come and discuss counseling in the library space.
- This event is intended for directors; if someone needs to send their Assistant Director, that would be fine.
- The schedule of events should be ready in a couple of weeks.

9.4 Holds placed on items only owned by schools (discussion) [AED]

- Some schools are not transiting holds. Part of this is a training issue.
- Schools have a high staff turnover rate, and some school staff are not trained.
- We are considering offering basic orientation at schools this fall. We can offer resources to explain the processes.
- We send emails and mailed packets. We will send something through delivery a little later. Every year we start this process anew. All the schools want to share.

- Schools place less than 10% of system holds.

9.5 Noting patron problems for staff in the system (discussion) [AED]

- This topic comes from feedback from the last DAC meeting. The concern is deleting a patron during general system maintenance or when clearing out old bills.
- If it is your patron and your items, Kendal suggests resolving the issue in house.
- If a patron is in collections, the patron record can be kept for 8 years.
- If a patron is flagged, they should not be able to get another library card if libraries are following the rules.
- The system for removing discarded items works well. This system should be used as it was designed.
- We are considering manually setting the patron status to CARD BLOCKED/DELINQUENT. That would block them but keep them in the system.

10. Committee Development (discussion) [Chair]

10.1 Committee member comments and talk about projects in your library

- Genna states they are going to referendum. Bond levies will be paid off early. They will see how it goes. There is an FAQ on the Fondulac website with more information.
- Alissa shared that her library has issued an RFQ for an architect. They have a lot of land and want to build an addition. This is a five-year journey they have just started.

10.2 Guest comments and talking about projects in your library

- No comments

11. Additional public comments [Chair]

No comments

12. Chair's time, agenda building for 14 October meeting [Chair]

- Alissa requested to move items 9.5 and 9.6 further up in the agenda and calling it Member Topics. This will be moved to the top of New Business.
- An announcement was made to use the directors' listserv to remind them to send agenda items to Antony.

13. Adjournment [Chair]

Meeting adjourned at 3:26 pm

Minutes compiled by: Laura Spires, RSA Business and Marketing Coordinator

Minutes Approved by:

RSA Staff Report for 14 October 2026

Membership Updates: Ongoing Topics & One-Offs

Notable Membership Activity

Hamilton Public Library – Received RAILS Automation Grant in May 2025

- Cataloged 4,802 items so far.

Camp Point Public Library - Received RAILS Automation Grant in May 2025

- Cataloged 4,964 items so far.

Patron Facing System Updates, Projects, Issues: Ongoing Topics & One-Offs

A running list of major projects patrons are affected by directly or may notice while using the system.

Adding Online Payments to RSACat

In 2015 we started adding the online payments integration to RSACat profiles for full online members. At the time we had 24 public libraries who wished for this integration. No libraries requested it after that. When we subsequently rolled out the RSACat Mobile app a couple of years later, we were able to add online payments for all patrons via that app. Patrons love it and well over 50% of the online payments are made via the RSACat Mobile app.

Maria has started adding the online payment option to all public RSACat profiles that don't have it. She immediately hit a snag and is working with SirsiDynix to correct it. She was able to do a few and is still reaching to members to check your contact details for the website. You'll hear from her prior to, and again when your RSACat profile goes live.

Hoopla - RSACat Integrations

Maria will also restart work with member libraries who have a Hoopla subscription, but do not have Hoopla visible in RSACat. The price will be around \$100 a year. Contact [Maria](#) if you are interested.

Important Ongoing Issues & Staff Workplan Updates

Updates to the RSA Staff Workplan and various other important Issues. Note, to keep the length of this report in check, we'll only report on updates and changes.

The entire Workplan was part of the 7 May 2026 Board package and is available on request.

Important Ongoing Issues or Short-Term Projects:

- In depth library automation system review – watching a sister consortia's RFP proposals for Several system vendors.
- June 2 – 4 for 3 vendor presentation imparted useful information for our consideration

Staff Workplan – Patron Visible Items:

- RSAcat (Enterprise/Portfolio server) on the web upgrade.
 - Our Enterprise/Portfolio server which runs RSAcat on the web, was updated to the latest version overnight May 31st.
 - Then we reverted back to the old version a week later due to unfortunate conflicts with the new Cloudflare security enhancements SirsiDynix recently made.
- RSAcat online catalog – online payments for all public libraries (as discussed above)
- Hoopla RSAcat Integrations – (as discussed above)

Staff Workplan – Other Items:

- No Transit Item Types – new feature of Symphony/WorkFlows 4.2.
 - A setup and usage plan was presented for comment at the last DAC meeting
 - Item Types have been created and Fondulac's identified items are being transferred to new No-Transit format records
- Shared ownership of reports – new feature of Symphony/WorkFlows 4.2.
 - Development work done, on hold for more important projects
- Brief Bot – Database cleanup project – further information in the Bibliographic Services section of the report below.
- BLUEcloud Circulation – slowly coming to a library near you. 135 users have been configured at 24 member libraries
 - BC Circ was updated overnight in late August with version 26.03. The key feature is that both patron and item searches can be limited by library. Sirsi tells us to anticipate 26.04 around Thanksgiving. Our documentation for members has been updated where necessary to reflect the recent changes.
- RSA Directors Day – Directors Only
 - About 43 attended plus 8 presenters. Big thank you to Laura, the presenters, and Noelle.
- Reports – Reworking End of Month reports and cooking up new Dashboards.
 - First batch of testing reports has gone out to the Reports Working Group. We're working to create short videos and are working on updated Support Site report index pages with short descriptions.
 - You can still volunteer to join the working group! Just let us know.
- BLUEcloud Cataloging – matching and attaching via your browser.
 - Still needs setup work by SirsiDynix before we can start staff testing
- Review, update, replace, remove – the lifecycle of documentation continues. The average age of documents on the support site is now 19 months. In 2027 we will start a formal 3-year cycle for refreshing documents with all documents from 2024 and earlier to be updated during the year.
- Library Automation System Environmental Scan – let's see where the library world is in late 2026.
 - This will help us review the current state of the backend systems, reports systems, and the patron-facing systems. Patron-facing systems are the easiest to swap out.
- New Executive Director and transition process – knowledge sharing already started.
 - Update from Genna.
- Additional RSA Staff in calendar 2027 – 2 new positions in planning, +1 for the ED position.
- Strategic Plan 2027 – Independence is ours, what's our plan for the future? Initial meeting of the working group planned for October 13th.

Reminder About Library Holds for Hamilton PL and Camp Point PL

Both these new members pay full RSA membership fees during their cataloging periods. As full members, they are eligible to place system level holds. The RSACat Union List holds page has been updated to include these new members in the selection of hold pickup libraries. The RSA delivery codes cheat sheet and membership list have been updated to show these new, special user IDs.

Bibliographic Services Department Update

- Routine cataloging site visits are underway, with 14 public libraries visited by Jennifer or Lisa since the July DAC meeting. Zac shadowed 6 of these visits.
- Basic WorkFlows Cataloging Workshops have been taught monthly, with a total of 12 library staff participating in July, August, and September. Zac is teaching his first Basic WorkFlows Cataloging Workshop today, October 14th, for 7 participants.
- Erica taught the first in-person Bibload Workshop at the RAILS East Peoria Service Center in August. The 4 participants expressed interest in more RSA training held in-person at the RAILS office.
- The [Cataloging No-Transit Items Guide](#) was finalized and is now available on the RSA support site. Fondulac DL assisted with testing cataloging and circulation procedures for no-transit items. Bibliographic Services converted 390 OCLC records for existing Fondulac items into no-transit records due to the library's sizable no-transit collection.
- Bibliographic Services has been assisting Antony with the cleanup of items assigned misused home locations by sharing reports of the affected items during cataloging site visits and editing home locations to the correct codes.
- All schools will have their WorkFlows TECH accounts disabled by the end of this month. Bibliographic Services is in the process of contacting 12 schools to transition them to using individual cataloger accounts. TECH accounts for 24 public libraries were already disabled over the summer.
- The [Cataloging Chat recording](#) and its [agenda](#) were shared on the RSA Cataloging email forum in late September. This Chat was recorded without live participation because there was interest in this type of meeting when RSA conducted a membership survey about Cataloging Chats last fall.
- The topic of the Cataloging Corner article in the September RSA e-newsletter was the Global Item Modification wizard. Check out the recently updated [guide](#) for a refresher on this helpful but often forgotten about wizard.
- Bibliographic Services has begun sharing a new [online form](#) to set up circulation and hold rules. Keep this form in mind the next time you need to set up new rules or modify existing ones. Please call the RSA Help Desk if you have questions about the form.
- Zac contacted all public libraries and schools to ask their help reviewing reports of older brief records to see if any can be discarded. The brief records have either never checked out or not in the past ten years. Newer items cataloged in the past 13 months are excluded from the brief record reports based on a suggestion from the DAC at their July meeting. A total of 1,672 brief records for public and school libraries have been removed so far since this project began over the summer.
- Jennifer is participating virtually in two SirsiDynix Strategic Partner Programs. They focus on the implementation of AI in the BLUEcloud Discovery catalog and the development of checkout, bill, and holds histories in BLUEcloud Circulation.

- Lisa presented as part of a panel at the Illinois Library Association annual conference last week. The session was titled “Unsolved Mysteries: Cataloging for Non-Catalogers.” About 60 people attended the session.
- Brand new cataloging documentation created since the July DAC includes a [cheat sheet](#) that explains the OCLCEXCLUDE item cat 6 code and a [flyer](#) that provides an overview of WorkFlows cataloging codes. Brand new videos include [Matching an OCLC Record to Your Book](#) and [Matching an OCLC Record to Your DVD](#).
- Development continues for Brief Bot, RSA’s ongoing automated brief record cleanup process. This [flyer](#) explains each step in the process. RSA is currently working with SirsiDynix to develop step 2 mentioned in the flyer, which involves merging duplicate brief records into a single brief record. During the previous step of Brief Bot, 10-digit ISBNs on 4,392 brief records were converted to the 13-digit equivalent ISBNs to improve matching and ease overlay of brief records with matching OCLC records. Brief Bot’s goal is to reduce the backlog by cataloging brief items on matching OCLC records that have rich bibliographic description. OCLC records improve discoverability in WorkFlows and RSACat.
- As a parallel project to Brief Bot, Antony began testing a new Standard Number Addition Project with 5 public libraries. Reports of brief records without standard numbers (i.e., ISBNs, ISSNs, and UPCs) were shared with each library. They were asked to pull each item on the report from the shelf, scan or type the standard number for that item into the report and email it back to the RSA Help Desk once they worked through the report. RSA then uses an administrative tool to add the standard numbers to the brief records so they can be considered during Brief Bot.
- As part of the Harmony project, the UNKNOWN code has been removed from all libraries’ WorkFlows item cat 1 and 2 drop-down menus. UNKNOWN should never be assigned to an item. RSA plans to work with SirsiDynix to completely remove UNKNOWN from WorkFlows in item cats 1 and 2 and eventually item cats 3, 4, and 5.
- Bibliographic Services began collaborating with the Cataloging Maintenance Center to plan a joint session for RSA Day 2027. The topic will be cataloging services, tips, and tricks RSA libraries may not know or have forgotten about.

Staff Updates Since the Previous Meeting

Staff Anniversaries

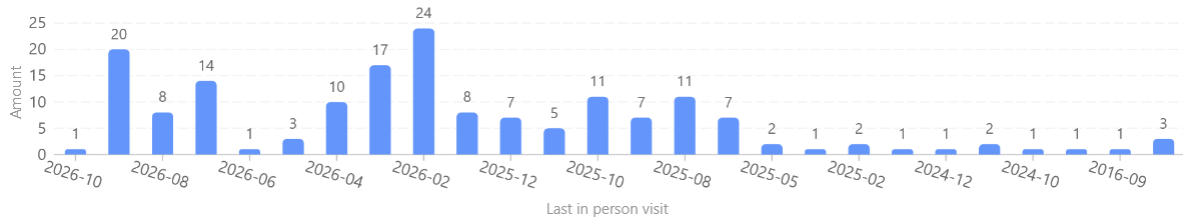
- James Campbell – 15 years in August
- Patty Kweram – 8 years in August
- Sara Naslund – 7 years in August
- Kendal Orrison – 21 years in September

Misc. Staffing Notes

- We continue to train our four new staff members. Great progress for everyone.
- Kendal continues to schedule time blocks with Mason and Maria to train various items.
 - Blocking out time appears to be the best solution to busy schedules.
- Kendal has presented two Symphony U courses to the entire RSA Staff. We’ve covered
 - Library Policies, which are quite a bit more involved than just a line saying P8_NORTH. Item policies, item types, item categories, etc. was the second course.
 - User policies next which are very complicated.

Completed RSA Events July through August: Training & Visits

In person visits – visiting every library branch every 18 months. This continues with half of the public libraries being visited between July 1st and December 31st. The graphic below shows library visits by month. It is significant because we have reduced the number of branches never visited from 20 down to 3 since July 2025. The total number of libraries visited more than 18 months ago is now only 12.



IVC3 - Mossville	Back to School Circ Refresher	Member Services
Fulton County CUSD Elementary School	FY27 New Director Visit	Member Services
RAILS East Peoria Service Center	RSA Bibload Workshop	Cataloging
Hudson Area Public Library District	Routine Visit Hudson Area PL	Member Services
IVC CUSD Mossville	FY27 Holds Training	Member Services
Heyworth Public Library District	Routine Visit Heyworth	Member Services
Winchester ES	FY27 New Director Visit	Member Services
Clover PLD (CV_CLOVER)	Cataloging Site Visit	Cataloging
Microsoft Teams	Basic WorkFlows Cataloging Workshop	Cataloging
Wyoming Public Library District	Cataloging Site Visit	Cataloging
Lacon PL (LC_LACON)	Cataloging Site Visit	Cataloging
Teams	FY27 Special visit	Member Services
Dunlap PL	FY27 Routine Visit	Member Services
Henderson County PLD (HC_HENDRSN)	Cataloging Site Visit	Cataloging
online	WF Basic Workshop	Member Services
Greater West Central Libraries - all branches individually	FY27 Routine Visit	Member Services
IVC Schools Mossville	Back to School Refresher	Member Services
Mt. Hope-Funks Grove PLD	Cataloging Site Visit	Cataloging
Chenoa PL	FY27 Routine Visit	Member Services
LaHarpe Carnegie PLD	Cataloging Site Visit	Cataloging
Blandinsville-Hire Library District	Cataloging Drop In	Cataloging
Danvers Township Library (DANVERS-TL)	Cataloging Site Visit	Cataloging
Teams	FY27 Holds Workshop	Member Services
Knoxville Public Library	Routine Site Visit Knoxville	Member Services
Teams	FY27 BCC Training	Member Services
Virginia HS	FY27 New Director Visit	Member Services
Mason Memorial LD	Cataloging Site Visit	Cataloging
Chenoa PL (CHENOA-PL)	Item Group Editor Training	Cataloging
Wyoming Public Library	BCC Training	Member Services
In-person at Carlock PLD (CK_CARLOCK)	Basic WorkFlows Cataloging Workshop	Cataloging
Chatsworth Area Library	FY27 New Director Visit	Member Services
Microsoft Teams	Modify Title Training	Cataloging
Warren County PL - Roseville (WA4_ROSE)	Cataloging Site Visit	Cataloging
Warren County PL (WARREN-CO)	Cataloging Site Visit	Cataloging

Warren County PL - Alexis (WA2_ALXS)	Cataloging Site Visit	Cataloging
Kewanee Public Library District	Routine Site Visit Kewanee PLD	Member Services
Viola Public Library District	Routine Site Visit Viola PLD	Member Services
Towanda District Library	Routine Site Visit Towanda	Member Services
Teams	Basic Circulation Workshop	Member Services
Atlanta PL	FY27 New Director visit	Member Services
Teams	FY27 Holds Workshop	Member Services
Village of Avon PL	Cataloging Site Visit	Cataloging



Resource Sharing Alliance
715 Sabrina Drive
East Peoria, IL 61611
866-940-4083 & 309-315-9123

Harmony: Clarity, Cleanup, and Standardization Concepts for RSA's ILS

Last updated: September 29, 2026

Background

RSA staff have been working for several months to prepare for an Integrated Library System (ILS) migration. We have been working on the assumption that following an environmental scan to be conducted this fall, we would most likely complete an in-place Symphony to Symphony migration about a year from now followed by the possibility of a full migration at the end of our current contract with SirsiDynix.

The current Symphony system went live almost 20 years ago and was designed at a time when there was little consensus among member libraries about the way that materials should circulate to patrons, and there were tighter constraints on what Symphony could do.

In the intervening two decades several trends have developed to build something of an unplanned consensus. 128 of our libraries have gone fine free, meaning there are many fewer fine/bill rules required. Libraries have often standardized their own circulation rules so that there are fewer different circulation limits for different types of patrons or for different types of material. These trends were accelerated by the COVID-19 pandemic as libraries sought to make things easier for their staff and patrons and have further developed as 58 RSA libraries have adopted autorenewals. In addition, updates to Symphony means that multiple user profiles and item types can be combined on a single row in the circulation map.

In a recent conversation with the support team at Sirsi we were strongly encouraged by them not to work towards an in-place migration but instead clean up our current database by removing policies including old libraries, item types, and item categories, circulation rules and overdue bill structures as well as renaming the current libraries, all using our new naming conventions. We had not previously understood that this kind of work was possible in the confines of our existing database, and this came as a bit of a revelation.

The advantages of this approach is that it will be less disruptive for member libraries, RSA staff can work on the project over a longer period, we can leverage services from Sirsi that we already pay for to help us, and it will cost a lot less to implement than an in-place migration.

To this end, we have started implementing some changes already, including creating new overdue bill structures and circulation rules. These changes will be explained more fully below.

What is Harmony?



As we have adjusted our focus away from an in-place migration to thinking about how we should clean up our current Symphony database, we realized that referring to the overall project as a database migration was no longer useful.

The **Harmony Project** will focus on three aspects of work on the database: Clarity, Clean Up, and Standardization. These aspects will go hand in hand so that the database is easier to understand and simpler to administrate. Look for the Harmony logo on our communications about this project.

The name **Harmony Project** was chosen partly as a music inspired riff on the database's name, Symphony, and partly as an expression of the main aims of our work to provide clarity, to clean up unused system policies, and to work towards greater standardization between libraries where it is possible and desired. The **Harmony Project** supports the [RSA Core Principles](#) of Reciprocity, Convenience, Discoverability.

Implementation of the Harmony Project

Design Fundamentals

In developing the design for the elements of the new database I have followed these fundamental principles.

1. The design language must be system neutral
 - Examples are based on Symphony constraints, but the overall principles should apply in the event we migrate to a different vendor in the future
2. Codes should be human readable
 - Codes should be designed consistently to allow RSA staff and others to easily interpret them
 - When abbreviating codes such as Library System Codes to fit digit constraints vowels are cut first as this leaves the abbreviated code human readable
3. Ensuring a future proof design where possible
 - Codes should be designed to allow for addition of library branches, new circulation rules, new item types, and so on
 - No design can be future proofed against a library changing its name, but new codes will reflect the new names of libraries that have changed in the last 20 years

Library System Codes

The first candidate for redesign is the System Codes in no small part because they were one of the easiest to work on. These codes have been developed using the Design Fundamentals listed above. Another consideration is that when the current Symphony database was developed the

decision was made to use the two-digit codes used in the previous CarlX system as a kind of prefix to the ten-digit system code. In a new system we would no longer need to follow that strict rule and would instead use a four-letter abbreviation when we need one. The other major consideration we need to address in designing the new codes is to clearly distinguish school libraries from publics in the hopes of ameliorating the large number of items which get sent to school libraries in error.

In the example shown in Figure 1, Peoria Public Library's branches are numbered 1-6. PEORIA0 refers to the library group to which all the branches belong. If Peoria Heights were to open a new branch it would receive the code PHEIGHTS2. While this might be unlikely, it is much more likely they might obtain lockers, which if they "own" items would need to be set up as a pseudo-branch. By dropping "-PL" in RUSHVIL-PL RUSHVILLE1 is easier to read. And by prefixing the school codes with "S_" it is easy to determine that this library is a school. To keep to ten digits, we drop the vowel "o" from the name Abingdon but "S_ABINGDN2" is still easy to read.

Figure 1: Sample of new system codes

Current System Code	Proposed New System Code	Length	Description
P0-ALL	PEORIA0	7	Peoria Public Library - Group
P0_MAIN-ST	PEORIA1	7	Peoria Public Library - Main Street Branch
P1_LVIEW	PEORIA2	7	Peoria Public Library - Lakeview Branch
P2_LINCOLN	PEORIA3	7	Peoria Public Library - Lincoln Branch
P3_MCLURE	PEORIA4	7	Peoria Public Library - McClure Branch
P8_NORTH	PEORIA5	7	Peoria Public Library - North Branch
P7_OUT	PEORIA6	7	Peoria Public Library - Outreach
PHEIGHTS	PHEIGHTS1	9	Peoria Heights Public Library
PITTSFIELD	PITTSFILD1	10	Pittsfield Public Library District
RANSOM-MEM	RANSOM1	7	Ransom Memorial Public Library
RUSHVIL-PL	RUSHVILLE1	10	Rushville Public Library
AB-ALL	S_ABINGDN0	10	Abingdon - Avon District 276 - Group
ABINGDN-HS	S_ABINGDN1	10	Abingdon-Avon CUSD #276 - High School
AB2NGDN-GS	S_ABINGDN2	10	Abingdon-Avon CUSD #276 - Hedding Grade School
AVON-CUSD	S_ABINGDN3	10	Abingdon-Avon CUSD #276 - Middle Elementary School

Although new System Codes were the first thing to be designed, they will be the last thing to be implemented as Sirsi will charge for the renaming process and that price should be cheaper once the rest of the work is done.

Item Types

There are currently 192 item types in Symphony, including 64 just for Books. Historically, Item Types were created to solve various problems with the large number of ways libraries wanted to circulate their items because the item-owning or circulating library, Item Types, and User Profiles are the only three elements Symphony considers when deciding if a circulation can happen or a hold can be placed. In addition, Item Types were created to describe both what the item is and how long it can circulate.

We will develop a simpler set of Item Types which are more generic and flexible. In the example in Figure 2, there would be several generic Book Item Types to accommodate the various needs of member libraries as well as some item types designed for specific purposes such as for limiting items to local holds only or to make them non-circulating such as for reference or special collections. A set of these Item Types would be available for Books, Periodicals, DVDs, Blu-rays, Audiobooks, Interlibrary loan items, Realia, and other broad categories. These broad categories would be mapped to format icons in the OPAC discovery layer.

We will also move away from any reliance on item types to tell library staff and patrons as to where to find items in your library. Instead, we will rely on Home Locations, which would not be restricted, as well as reliable call numbers implemented by staff at member libraries.

Figure 2: Suggested Item Type example

ITEM CAT 3	ITEM TYPE	LENGTH	Description
BOOK	BOOK-01	7	Generic
BOOK	BOOK-02	7	Generic
BOOK	BOOK-03	7	Generic
BOOK	BOOK-04	7	Generic
BOOK	BOOK-05	7	Generic
BOOK	BOOK-06	7	Generic
BOOK	BOOK-07	7	Generic
BOOK	BOOK-08	7	Generic
BOOK	BOOK-09	7	Generic
BOOK	BOOK-10	7	Generic
BOOK	BOOK-LH	7	Local Holds only
BOOK	BOOK-NC	7	Non-Circ
BOOK	BOOK-NWH	8	New Holdable
BOOK	BOOK-NWL	8	New Local Holds only
BOOK	BOOK-NWN	8	New Non Holdable
BOOK	BOOK-SP	7	Special

Overdue Bill Structures

There are currently 235 overdue bill structures in Symphony which we no longer use. These will be removed by Sirsi Dynix as part of the cleanup they are helping us with. The naming of new bill structures will be based on the table at Figure 3.

Figure 3: Overdue Bill Structure naming table

Daily Amount	First Letter	Maximum Amount	Second Letter
0.05	A	1.00	A
0.10	B	2.50	B
0.20	C	3.00	C
0.25	D	5.00	D
0.50	E	6.00	E
1.00	G	7.50	G
2.00	H	10.00	H
5.00	J	12.00	J
STAGGERED	X	15.00	K
		20.00	L
		25.00	M
		50.00	N
		80.00	Q
		100.00	R
		Price of item	P

An overdue bill structure of 10 cents a day up to a maximum of \$3 would be named BC_05C_03D which I hope provides a clear explanation of the rule within the ten-character limit we currently have available.

I completed a census of which bill structures are currently being used and what we would call them under the new naming convention which can be found in Figure 4. (Lines in green represent structures that have already been created. I also included how many days it would take to get to the maximum amount. It is worth considering that if a rule won't max out before the item goes lost then the max amount could be reduced to be in line with the go lost period, or to max out at the price of the item.

We will be reaching out to all the libraries that charge overdue fines to check with them that the current rules still work for them before we create the new overdue bill structures and circulation rules.

Figure 4: Overdue Bill Structure Census

Existing Code	Occurrences	New abbreviation	New full code	Length to max
AC	3	AA	AA_05C_01D	20 Days
AH	4	AD	AD_05C_05D	100 Days
AL	1	AM	AM_05C_25D	500 Days
BE	2	BB	BB_10C_2DL	25 Days
BF	1	BC	BC_10C_03D	30 Days
BH	9	BD	BD_10C_05D	50 Days
BI	2	BH	BH_10C_10D	100 Days
BT	1	BE	BE_10C_06D	60 Days
DH	2	CD	CD_20C_05D	25 Days
EH	2	DD	DD_25C_05D	20 Days
EI	1	DH	DH_25C_10D	40 Days
FE	1	EB	EB_50C_2DL	5 Days
FH	3	ED	ED_50C_05D	10 Days
FJ	1	EK	EK_50C_15D	30 Days
FU	1	EE	EE_50C_06D	12 Days
GH	8	GD	GD_01D_05D	5 Days
GI	1	GH	GH_01D_10D	10 Days
GK	1	GL	GL_01D_20D	20 Days
GL	2	GM	GM_01D_25D	25 Days
GQ	1	GN	GN_01D_50D	50 Days
GT	1	GE	GE_01D_06D	6 Days
II	1	HH	HH_02D_10D	5 Days
IK	1	HL	HL_02D_20D	10 Days
IQ	1	JN	JN_05D_50D	10 Days
IT	1	HJ	HJ_02D_12D	6 Days
LH	1	JD	JD_05D_05D	1 Day
LK	1	JL	JL_05D_20D	4 Days
LL	2	JM	JM_05D_25D	5 Days
LR	4	JR	JR_05D_CD	20 Days
LU	1	JQ	JQ_05D_80D	16 Days
NEW	1	BP	BP_10C_P	Price
NEW	1	GP	GP_01D_P	Price
NO		FF	FINEFREE	N/A
X1	1	XD	XD_05C_05D	100 Days
X2	1	XH	XH_05C_10D	200 Days
YC	1	BG	BG_10C_7DL	75 Days
YD	1	DG	DG_25C_7DL	30 Days
37	67			

Circulation Rules

After 20 years of using our current Symphony database, we have accrued 1850 circulation rules that are no longer used. We have asked Sirsi to start removing these for us. In addition, under our previous way of creating circulation rules each line in the circulation map has its own unique rule which meant that if a library wanted to change its method of circulating certain items, we created a brand-new rule.

We have already started moving to new rules that are not unique to a certain library but instead are named after the billing structure they use. So, all circulation rules that are fine free will begin FF. Any that charge overdue fines will be named after the first two letters of the bill structure they rely on. So far, we have created 19 new circulation rules with the new naming convention which have replaced approximately 170 old ones. The great advantage of this is that now when a library contacts us to change how their items might circulate there is a strong chance that we will already have a rule ready to be implemented right away which is more convenient for the member library and saves RSA staff time.

As mentioned above, part of the design fundamentals is that codes should be human readable. While circulation rules are not directly visible to staff at member libraries (although they can be seen in the circulation map available on the Support Site), I thought it would be useful to show how rule names might be designed to make system administrative tasks easier and more efficient for RSA staff.

Circulation rule naming convention

Figure 5 shows examples of some Circulation Rules and how we are now naming them. The naming convention shown in this example is based on the 10-digit maximum allowed in Symphony but could be rethought and adapted should we migrate to a different ILS with different constraints.

Figure 5: Circulation Rules Examples

Example 1

FF_14_2_U: Fine free items that are checked out for 14 days can be renewed twice along with an unlimited number of items.

BILL Structure used	Number of checkout days	Number of renewals	Number of items	Grace period
FF_ (FINEFREE)	14_	2_	U (Unlimited)	

Example 2

FF_14_1_4: Fine free items that are checked out for 14 days can be renewed once along with a total of 4 items.

BILL Structure used	Number of checkout days	Number of renewals	Number of items	Grace period
FF_ (FINEFREE)	14_	1_	4	

Example 3

GL_21_1_4: Items that use the GL_01D_20D overdue bill structure that are checked out for 21 days, can be renewed once along with a total of 4 items.

BILL Structure used	Number of checkout days	Number of renewals	Number of items	Grace period
GL_ (GL_01D_20D)	21_	1_	4	

Example 4

GL_21_1_4G: Same as Example 3 but has a Grace period before fines are charged.

BILL Structure used	Number of checkout days	Number of renewals	Number of items	Grace period
GL_ (GL_01D_20D)	21_	1_	4	3 days

What's next?

We will be identifying other policy categories where cleanup can be done and will be working through them with Sirsi Dynix. We are already thinking through the removal of unused item categories, user policies, and user categories.

Later this year RSA staff will take an environmental scan to see what other ILS systems are available and might meet RSA's complex needs and financial constraints. SirsiDynix and other interested vendors will be invited to provide demonstrations of their products.

What can we do?

If you are Director or their designee, I would encourage you to attend the DAC where I will continue to provide updates on the **Harmony Project**. Details of DAC meetings can be found [here](#).

Most important of all

When you receive emails inviting you to take part in surveys or to ask what settings you need us to implement, please be responsive. We really do need your input.

I would also encourage you to contact me at antony.deter@librariesofrsa.org if you have any suggestions, concerns, or questions with standardization and migration. Also email for a copy of this document. It will also be available [here](#).

7-4 RSA Succession Plan

August 3, 2026

To: RSA Board of Directors serving in FY2027

From: Genna M. Buhr, President, on behalf of the RSA Board of Directors serving in FY2026

RE: RSA Succession Planning and Recommendation

As you are aware, Kendal Orrison's upcoming retirement requires the Resource Sharing Alliance Board of Directors to complete the succession planning and hiring processes necessary to successfully employ a new Executive Director effective June 1, 2027.

The members of the FY2026 Board determined it should provide written documentation to the members of the Board serving in FY2027 regarding its recommendation on next steps. While a majority of the Board members serving in FY2027 served in FY2026, any final hiring decisions will be made by the Board serving in FY2027, which includes two members that did not serve previously in FY2026.

During FY2026, the Board met in closed session multiple times to discuss these processes. In the course of discussion and prior to making a recommendation, the Board considered pursuing an internal candidate, Assistant Executive Director Antony Deter, or conducting a broader recruitment strategy. The Board confirmed with its counsel that an internal promotion is legally acceptable, and no legal requirement exists for the position to be posted either internally or externally. The Board also reviewed the job description and the unique combination of skills and expertise necessary for anticipated success in the position and considered these requirements when gauging the probability of qualified unknown candidates available in the market.

Therefore, the consensus of the Board is to decline pursuing a full search committee recruitment process. Rather, the Board recommends conducting a confirmation interview with the intent of promoting the current Assistant Executive Director, Antony Deter, to the Executive Director role.

Deter was hired to a newly created Assistant Executive Director role in 2023. The role was created as part of a potential succession plan with the knowledge that the Executive Director would be retiring in the next five years. Since Deter's hiring in 2023, he has played an integral role in the administration of RSA, successfully completed many vital projects related to policy, governance, staff oversight, and membership structure, and was crucial to the transition from not-for-profit entity to intergovernmental instrumentality. Deter has led and continues to spearhead many projects related to the current management and future operations of RSA. RSA leadership has noted and many members have reported positive interactions with Deter. As a Board, we appreciate his input and value his experience and commitment.

In evaluation of Deter's qualifications, in addition to the current and anticipated needs of RSA and a probable limited pool of candidates with LLSAP leadership experience, we have concluded Deter's knowledge of our organization, leadership experience (both within RSA and Illinois libraries), and performance since joining RSA make him an ideal candidate to engage.

As such, the Board respectfully recommends the following succession planning timeline moving forward:

- August 7, 2026, Board meeting
 - Open session
 - Review and discuss the succession planning and timeline recommendation outlined in this memo
 - Board votes to determine whether to follow the recommended timeline below or develop a new timeline for a broader search process (roll call vote)

- September-October
 - Board members submit interview questions for consideration to Board President by October 1
 - Membership is notified the interview will be conducted in open session as part of the November 5, 2026, Board meeting and that Directors may submit interview questions for consideration to Board President by October 1
 - Board President and Vice President review and assemble questions and structure interview, providing outline to Board (via Orrison, per OMA requirements) mid-October
- November 5, 2026, Board meeting
 - Teams link for remote viewing
 - Open session
 - Board interviews Deter
 - Executive session in compliance with 5 ILCS 120/2(c)(1)
 - Determine whether to extend an offer to Deter or develop a new timeline for a broader search process
 - Open session
 - Board vote on next steps
 - Two action items will be included on the agenda so as to cover either outcome of the executive session. (The Board can move, second, and vote on the one that corresponds to the determination made in executive session. When the other is called, no one needs to make a motion, and the item will not be discussed.)
 - Motion to grant authority to Board President to negotiate terms of employment, including compensation (roll call vote)
 - Motion to pursue a broader search process and develop a new timeline (roll call vote)
- November-December
 - Board President presents Deter with pay scale and benefits before offer or discussion of compensation
 - Board President develops and negotiates offer/terms of employment with consultation from HR consulting firm and Orrison (for budgetary questions)
 - Board President makes offer and serves as contact for discussion or negotiations
- January 14, 2027, Board meeting
 - Executive session in compliance with 5 ILCS 120/2(c)(1)
 - Board President presents results of negotiations of terms of employment, including proposed compensation
 - Board discusses terms of employment, including proposed compensation
 - Deter may be invited by Board to enter session if needed for final agreement or to discuss consensus before open session vote
 - Open session
 - Board vote to confirm hiring of Deter as Executive Director effective June 1, 2027 (roll call vote)
- January 15, 2027
 - Board President officially informs staff of Board vote and next steps
 - Board President officially informs membership of Board vote and next steps
- Starting January 18, 2027
 - Assistant Executive Director position would not be refilled if vacated by Deter upon Orrison's retirement
 - RSA Administration and Board begin further transition planning, including pursuing creation of a position for Operations