SWAN Tactical Plan

IN SUPPORT OF STRATEGIC PLAN FOR FISCAL YEAR 2024

AARON SKOG, EXECUTIVE DIRECTOR, SWAN

Strategic Plan Objectives

1. Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)
2. Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions
3. Reconstitute as a Mission Driven 501c3 with Clear Representative Governance Practices
4. Increase Presence of the Patron Perspective
5. Strengthen the Collective Identity
6. Seek External Funding Options to Support the Research & Development Initiatives of SWAN

Completed Goals: 2019 - 2022

Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)

- Form operational think tank, aka Clarity Task Force
- Curriculum of training for library staff
- Study ILS processing inefficiencies
- Expand online documentation
- Assess discovery platform & provide recommendation
- Implement new discovery platform (Aspen)
- Form item type task force
- Initiative for online self-paced training
- Institute monthly office hours for key applications and services

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

- Complete infrastructure migration
- BLUEcloud Mobile app
- OCLC Holdings Manager
- Offer e-content group purchases
- Evaluated BLUEcloud staff interface
- Perform assessment of BLUEcloud Acquisitions
- Automate delivery in-transit label
- Negotiate extension of SirsiDynix agreement
- Negotiate 3-year agreements with EBSCO
- Migrate servers & services from RAILS to SWAN infrastructure
- Replace automated voice notification
- Add 3 new libraries: SWAN100 project
- Develop AV item type recommendations
- Establish parameters for Fine Free
- Pilot Baker & Taylor rentals
- Build "Your Library Statistics" monthly report
- Implement Book Club Reservation system
- Implement Pseudo Libraries for drive-up and locker pick up
- Automate monthly removal of inactive patron records
- Provide Recommendation on Marketing Automation Platform for Libraries
- Complete BLUEcloud Circulation usability test with member libraries

Objective 3: Reconstitute as a Mission Driven 501c3 with Clear Representative Governance Practices

- Evaluate organization legal entity
- Revise budget structure

Objective 4: Increase Presence of the Patron Perspective

- Develop & deploy online patron registration
- Incorporate patron help into public catalog
- Increase protection to patron personal identifiable information (PII)
- Develop accessibility standards

Objective 5: Strengthen the Collective Identity

- Pilot online membership forums
- SWAN eXpo 2019
- Clarify role of advisory & user groups

Objective 6: Seek External Funding Options to Support the Research & Development Initiatives of SWAN

- ARPA research conducted in 2021

• Hold SWAN eXpo 2020 web series • Convene monthly Fireside Chat sessions	• Apply for National Endowment for the Arts grant • Engage with ILA Public Policy Committee • Research Federal funding options

Tactical Plan: initiatives for 2023

Timeline categorization represents when activity begins in earnest. Many of the tactical plan work efforts will continue across multiple quarters, with many becoming adopted ongoing practice.

.

Mobile App Evaluation

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

Tara Wood, User Experience Manager

Beginning this fall or winter we will conduct an evaluation of the landscape of catalog mobile apps. We are currently using BLUEcloud Mobile as our supported app, but we are encouraged by recent developments in LiDA, the companion app to Aspen Discovery. Moving to LiDA would give patrons a consistent experience with search and account management across platforms, and development of new features has been as frequent as we see with Aspen.

Though we're most interested in LiDA at present, our evaluation will not neglect other offerings, including the new Library App released by SOLUS this year.

MessageBee Phase 2 Development

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

Scott Brandwein, Assistant Director

Now that we are fully migrated to the MessageBee platform for SMS and e-mail patron notifications, we have concluded what we have been informally calling "Phase 1." We now have a short list of adjustments planned and future developments we are tracking. During "Phase 2," we have reduced our regular meetings with Unique Management, but we will continue to meet monthly to receive support and advocate for development of the platform that will serve our members.

Phase 2 will include the following:
- Deployment of a new "reports only" tier of access to the MessageBee portal in response to member feedback

- Tracking member and patron feedback on the loss of autorenewal notifications to determine if this is something we need to build out
- Migration of phone notifications from SWAN Central portal to individual libraries
- Monitoring development of features for direct SMS messages to individual patrons and lists with plans to implement if possible

Continue to Improve Patron Data & ILS Platform Security

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

Ian Nosek, IT & System Support Manager

SWAN's 3rd party integrations with a number of vendors needs to move away from SIP2 and over to a secure system for authenticating patrons. This effort will entail SWAN IT & System Support educating the membership on the issues within the flawed, "easy" methods presented by 3rd party vendors.

Update: Ongoing

Vendors offering 3rd party integration are required to sign a Vendor Access Policy which outlines privacy, security, and connectivity requirements. New vendors are provided with secure access through web services which includes support from SWAN development staff in access data securely. Recent vendors integrations include Plymouth Rocket, MeeScan, and Patron Point. Work continues with e-Book and e-streaming services to migrate from SIP2 to web services. SWAN has developed a guide to authentication methods to assist vendors and partners in determining the best approach for connecting to SWAN's systems.

Managed Detection and Response (MDR) with Arctic Wolf

We have already begun the onboarding process with Arctic Wolf, a provider of security monitoring, threat detection, and response. The June 2023 board packet includes a memo providing an overview of the service. The suite of services we have purchased includes a collection of training materials for staff. These are designed to raise awareness of cybersecurity provide staff the tools to recognize cybersecurity threats, such as phishing attempts. We'll evaluate these tools and push them to SWAN staff as appropriate.

After we are set up, the following months will be an opportunity to fine-tune our incident reporting configuration, get an understanding of our security situation, and make a decision regarding a renewal with Arctic Wolf for another year.

Continue to Improve ILS Platform System Reliability

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

Ian Nosek, IT & System Support Manager

With new tools available in the Azure Cloud infrastructure, the IT and System Support team will finalize a plan for essential infrastructure disaster recovery, incorporating responses for service outages and security threats. Execute a planned fire drill of system outage to test redundancy and backup recovery.

Update: Ongoing

COVID-19 redirected IT and Systems Support efforts to managing changing ILS configurations, reports, and policies. Planned disaster recovery drill has been postponed until after SWAN100 project. Infrastructure fail-over network enhancements were operationalized in response to the August 2019 storm which impacted SWAN headquarters enabling additional service support migrating to the cloud infrastructure established in 2018.

Work in 2021 included review of backup processed and archival storage for recovery. Platform security was a major component in the work contracted in Fall 2021 with Sikich for their Information Security Risk Assessment Services.

Network Infrastructure Updates

As we are beginning to plan for hardware retirements and the eventual relocation of SWAN HQ, we have been taking an active look at our on-premises infrastructure. Both of our virtualization hosts are approaching retirement, however, as most of our critical systems are now hosted, these hosts will not be replaced outright Our new Synology network storage can also operate as a virtualization host, allowing us to run the servers with on-premises requirements under this device. All remaining servers at QR will be migrated to Azure or decommissioned.

Once completed, this project will significantly reduce our on-premises footprint and effectively bring all our critical systems into our cloud infrastructure. This will not only provide better reliability of systems, but also ensure that we're as flexible as possible when it's time to relocate.

Continued Support Site Development

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

Tara Wood, User Experience Manager

Once Tara Wood returns from leave, we will return our attention to our support site. We recently upgraded the platform to Drupal 9 alongside our migration to Pantheon hosted service. Drupal 9's end of life is scheduled for November 2023, so we hope to further upgrade to Drupal 10 before the year is out. We will investigate migrating the SWAN patron site to Pantheon as well.

Infographic on Value of SWAN Membership

Objective 5: Strengthen the Collective Identity

Aaron Skog, Executive Director

The Decennial Act statement SWAN provided prompted a discussion at the June 2023 Quarterly meeting about the benefits of SWAN with cost savings and cost avoidance perspectives. SWAN will provide a

infographic for member libraries on the benefits of membership to coincide with July 2024 membership fees.

Funding & Advocacy: ILA Public Policy Committee (PPC)

Objective 6: Seek External Funding Options to Support the Research & Development Initiatives of SWAN

Aaron Skog, Executive Director

This year the 3-year seat (2023 – 2025) on the Public Policy Committee seat was filled by Aaron. Up until this point, shadowing the PPC during its Zoom meetings was generously provided by ILA Executive Director, Diane Foote (now retired). The PPC allows for a front seat view of library policy and funding at the legislative level. The opportunity for SWAN/LLSAPs to obtain funding on a one-time or ongoing basis will require ongoing engagement with ILA and Illinois library leadership.

SWAN 50th Anniversary

Objective 5: Strengthen the Collective Identity

Aaron Skog, Executive Director

SWAN was established in 1974 and in 2024 the organization will turn 50 year old. The strategic plan initiative could be incorporated into a celebration of what libraries in Illinois have built cooperatively. The 50th anniversary could coincide with a new office space, and a new 5-year strategic plan.

Ticketing System & CRM Investigation

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

Tara Wood, User Experience Manager & Ian Nosek, IT & System Support Manager

Our current ticketing system, OTRS, is no longer meeting our support needs. The included tools for reporting, categorization, prioritization, and trend analysis are all either rudimentary or non-existent, and the version of OTRS we currently use is no longer supported.

This year, we plan to do an evaluation of alternative services. Beyond a straightforward help desk solution, we are interested in tools that integrate customer relationship management (CRM) and possibly a documentation platform. A more robust system can help us to tune our member support services, reduce response time, more easily provide access to documentation and training options, and give us the analytical tools we need to determine where members are struggling to adjust our support strategy accordingly.

The SWAN Management Team already began researching options in fall of 2022, but the project was pre-empted by MessageBee, the Addison migration, and some staff turnover. The newest version of our current software, OTRS 8, will be a candidate in this evaluation. Depending on how the research phase goes, we may begin an implementation before the fiscal year ends.

Create, Recruit, and Hire Web Application Development Position

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

Aaron Skog, Executive Director

Once the parallel discovery platform is up and running in SWAN's test environment, the decision on recruiting and hiring the new Web Application Development position will need to move forward.

Update: On Hold

The Executive Director took steps to eliminate a full-time staff position and prepare the personnel budget for the Web Application Developer. However, this position creation and recruitment is on hold due to the pandemic.

Standardize the Management of Holds for New Items (Clarity Recommendation)

Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)

Scott Brandwein, Assistant Director

Clarity identified that the way libraries in the consortium handle new items creates friction among libraries who need local copies for home library patrons, and confusion in accurately explaining the hold queues. SWAN will provide a recommendation for handling new materials within the consortium and create a set of benchmarks for reviewing and moving new items back into the generally available collection.

Update: Extended to 2023 (recommendation to be presented to membership)

Consistency and reduction in item types associated with new and special collections, representing book and audio-visual material types, is the first step in providing some uniform sharing practices. Expansion of reciprocity resource sharing group usage provides another tool in managing unique situations, both permanent and temporary, in the membership. Based on consolidation of item types, review of priority placement of local copy in Aspen, and analysis of high demand holds supplement through rentals, a proposal for more uniform practice in transiting new materials will be presented to the membership. Pilot libraries wishing to implement recommendation will be tracked through circulation efficiency (time with patron vs time in transit) of new items to measure effectiveness.

Form Governance Study Committee

Objective 3: Reconstitute as a Mission Driven 501c3 with Clear Representative Governance Practices

Aaron Skog, Executive Director

The charge to Governance Study Committee is to review the current governance structure, identify and review other forms of governance, and develop a recommendation for the SWAN Membership. The SWAN Board will formally call upon library directors and administrators to self-nominate for the Board appointed Governance Study Committee.

Update: On Hold

The Governance Study Committee written charge is complete. Ted and Aaron agree that library director's time and availability at this time is at a premium but will revisit this goal at the January 2021 SWAN Board meeting.

Create Net Promoter Score Survey

Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)

Aaron Skog, Executive Director

SWAN Executive Director will create an organization membership survey to set a baseline and ongoing evaluation of the performance and value of SWAN through a "net promoter score." This will require outside consulting for survey design that can be used consistently for the 5-year duration of this plan's objective.

Update: On Hold

HR Source has been contracted to work with SWAN on the survey. The survey was planned development and to be issued in October 2020. However, with continued exceptions to normal activities during the pandemic, this survey is on hold until a closer return to status quo.

Expand Patron Driven Acquisitions AV Experiment

Objective 4

Scott Brandwein, Bibliographic Services Manager

The membership survey showed high interest in patron driven acquisitions. Patron driven acquisitions is a process through which patrons trigger the request for purchase of an item found in the library catalog. The existing SWAN software platform cannot support individual library efforts for a "local patron driven acquisitions." However, a consortia-wide or subset of libraries in SWAN could participate in a centralized collection with material budget funds allocated towards the patron driven acquisitions activity. In 2019, SWAN experimented with patron driven acquisitions for the St Charles Public Library music collection. This experiment revealed a workable solution that could be targeted for specific collection development such as purchasing music AV.

Update: On Hold

While work with supporting schools, teachers, and students is ongoing, formation of the Task Force to further expand services and outreach to these populations is on hold. This is due to member library staff limitations and school constraints during these times. When our member libraries and school partners

have capacity to work more closely on partnerships, this work with commence.

Initiatives 2024

Strategic Planning

Our next phase of 5-year strategic planning will begin in earnest in calendar 2024. This will entail forming a committee with the governing board to create an RFP document, review proposals, and select a strategic planning consultant. The process will include feedback from membership and SWAN staff.

Completed Goals

Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)

Form Operational Think Tank, AKA Clarity Task Force

Clarity issued its report in November 2019. The report in full can be found online under the Strategic Plan Objective 1 on the SWAN support site (link to PDF). Findings from the Task Force have been added to the 2020 Tactical Plan.

Create a Curriculum of Training for Library Staff

SWAN created a curriculum of training for member library staff and provided these classes as ongoing online or in-person events. Courses include self-paced instructions on cataloging, serials, series, circulation basics, and patron management. Ongoing webinars are recorded for just-in-time learning. The SWAN Support Site was revamped to provide a more focused and sequenced list of training. https://support.swanlibraries.net/meetings-trainings/training/search

Conduct ILS Processing Inefficiencies Evaluation

The Symphony ILS configuration was reviewed for holds management, lending, and record loading within the Acquisitions workflow. SWAN's configuration and procedures are continuously reviewed, and documented both on the SWAN Support Site for members and internal knowledge base documentation for SWAN staff .

Create More Online Documentation

The SWAN support website relaunched in December 2018 and staff continued focus on writing documentation for library staff. Annually a content audit is managed by the UX team and content review assigned throughout SWAN staff. The latest audit was completed in summer 2021.

Assess the Discovery Platform for SWAN & Provide Recommendation

SWAN User Experience Manager completed catalog and discovery interface studies in 6 months intervals. Discovery & User Experience members were trained in user interface testing. The Discovery Platform Evaluation is posted online and the Aspen Discovery Service received the highest score of the platforms evaluated by SWAN.

https://support.swanlibraries.net/documentation/67126

Recommend Replacement of Discovery Interface

The Enterprise discovery interface was identified within the Clarity report as a major stumbling block for SWAN libraries in providing patrons a streamlined interface for print, e-content, and eBooks. The first

phase of the SWAN Aspen Discovery project concluded August 2020.

Implement Parallel Discovery Platform (Aspen)

The Aspen Discovery Service was set up in May 2020 and development of various e-content integration took place with a service agreement between SWAN and ByWater Solutions. The SWAN Aspen Project has involved the DUX advisory and a pilot with SWAN member libraries will take place as the next goal.

The catalog was deployed to the first group of libraries in October 2021, with the second group set for January 2022. The subscription to SirsiDynix Enterprise will no longer be included in the upcoming budget, effectively ending the use of Enterprise for SWAN libraries May 1, 2022.

Form Item Type Task Force (Clarity Recommendation)

Clarity identified the need to consolidate Symphony Item Types. The approach of using a task force was modified due to the global pandemic that arrived in March 2020.

The decided approach during the pandemic is to utilize Cataloging, Circulation, and DUX advisory groups to discuss SWAN's recommended Item Type configuration. This topic is a focal topic for FY20, illustrating the interdependency between technical services, circulation, and the patron experience. The plan is to continuously work with libraries to move toward a more manageable set of item types which present a consistent experience to the patron. Advisory group work and library consultations will continue to evaluation and implement these changes.

Led by Samantha Dietel, Bibliographic Services Consultant, book, audio-visual, and LoT (Library of Things) item types have been consolidated. Libraries continue to schedule one-on-one consultations and collection analysis with Sam to modify their collections and policies.

Training initiative for online self-paced training

The pandemic has made it evident that one-on-one training with new library hires is ever more a challenge with social distancing guidelines in place. SWAN created a series of online self-paced training using video instruction, interactive exercises and simulations, and learner engagement. A key focus of this training initiative is to combine situational scenarios are teachable moments to assist in onboarding and continual reinforcement of skills. Advisory groups continue to assist in identifying these situational training lessons.

SWAN now has a subscription to the software platform Articulate 360 which includes tools for rapid course development in a responsive format, allowing staff to review training on desktop, tablet, or mobile device. Style guide and templates for consistent learning experience were created.

As of November, 2021, seven online courses have been developed and deployed. In Fall, 2021, Inquisiq, an LMS (Learning Management System) was added to our toolset. This LMS allows tracking of learners and certification. Self-registration will open up in early 2022 for library staff.

Institute Monthly Office Hours for Key Applications and Services

Starting in January 2021, SWAN offered monthly office hours in cataloging, circulation, interlibrary loan, and BLUEcloud Analytics. Additionally, special sessions were offered for academic and special libraries. Aaron also hosted bi-monthly Directors' Office Hours. All of these casual, member-driven problem-solving sessions were open for shared discussion and specific case study. They proved to be valuable to members and SWAN staff and often identified areas where additional clarification, instructions, and procedures were required. These will continue and be expanded in 2022 to include Aspen Theme-based sessions, Circulation & Hold Map, and BLUEcloud staff.

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

Complete Infrastructure Migration

The transition to new servers and firewalls was completed in January 2019. The new volume email service was leveraged to provide an email lookup web application to member library staff. Cloning and backups procedure documentation was updated internally.

Membership Implementation Schedule

The Executive Director provided a recommendation on new libraries being allowed to join on a window that opens every other year, with a go-live set for the fourth quarter of the calendar year starting in 2020.

Internet Access membership was modified to only be provided to school libraries that have an existing partnership with a SWAN public library member.

Offer Library Patrons Mobile Application through BLUEcloud Mobile

All SWAN libraries now have a mobile app that has individual library branding (called Mobile templates). The SWAN Mobile app integrates with each library's e-content through the SirsiDynix eResource Central metadata harvest.

The mobile app feature set was expanded in 2021 to support self-checkout. Ten SWAN libraries have implemented this service.

Create New OCLC Holdings Update Process for SWAN: OHM

The long-standing arrangement of updating OCLC through The MARC of Quality (TMQ) will come to an end in 2019. SWAN has replaced this process for updating OCLC holdings with a new system called OCLC Holding Management (OHM). This was completed in a collaborative arrangement amongst our consortia peers (Illinois and SirsiDynix consortia).

Since June 2020, SWAN has provided monthly OCLC holdings updates for our consortia partners (CCS, Pinnacle, PrairieCat, RSA, SHARE/Heartland, and SWAN).

Study & Offer E-Content Consortia Purchases

The membership indicated a high level of interest in a consortium purchase for online subscriptions and e-content for library patrons. The SWAN Electronic Resources Consultant completed an e-content subscription through EBSCO offering to the 92 public libraries.

Additional opportunity for group discounts included Kanopy with SWAN libraries procuring a 10% discount in FY 2022 based on participation levels.

Evaluate BLUEcloud Staff Interface

Perform research/evaluation/usability testing on the new web-based interface BLUEcloud Staff which will replace the Java based client WorkFlows. Phase I evaluation includes Cataloging and Circulation. SWAN libraries (La Grange, St. Charles, SWAN headquarters) also participated in a controlled Phase III Pilot of BLUEcloud Acquisitions under the direction of SirsiDynix. All participants in pilot activities are also engaged in SirsiDynix Strategic Partners Program (SPP) feedback and activities.

In 2022, a production-readiness phase begins for libraries well suited for use of BLUEcloud staff.

Perform an Assessment of BLUEcloud Acquisitions

The BLUEcloud platform includes for SWAN a new system for library acquisitions. SWAN, LaGrange Public Library, and St Charles Public Library District participated in an official pilot for BLUEcloud Acquisitions with SirsiDynix. The assessment was shared at the December 2019 Quarterly membership meeting.

In December 2020, three new libraries joining SWAN, Glenside Public Library District, Roselle Public Library District, and Warrenville Public Library District implemented BLUEcloud Acquisitions in production.

Automated Delivery In-Transit Label

SWAN staff deployed an automated In Transit Delivery Label using the software development skills currently in-house. This tool is now in wide use throughout the membership, and is being made a requirement for new member libraries to use at go-live.

The BLUEcloud Central update of Fall 2021 has embedded this functionality into BLUEcloud Circulation. We shared our development of the Transit Delivery Label code with SirsiDynix in hopes of making this a part of the BLUEcloud functionality. It is exciting to see this work implemented into BLUEcloud.

Negotiate Extension of SirsiDynix Agreement

Executive Director negotiated renewal options for SirsiDynix vendor and presented a recommendation to SWAN Board for approval.

Year 6: May 1, 2020 (Extension begins, 0% escalation)

Year 7: May 1, 2021 (0% escalation, ability to remove specific products such as Enterprise begins)

Year 8: May 1, 2022 (0% escalation)

Year 9: May 1, 2023 (1.9% escalation)

Year 10: May 1, 2024 (1.9% escalation)

Negotiate Long Term Agreements with EBSCO & OCLC

EBSCO is now in a multiyear contract with fixed escalation rates. The EBSCO role is in SWAN's e-content platform with EBSCO for Discovery Service, Novelist Select, and OpenAthens. The OCLC statewide group services contract for cataloging and statewide resource sharing preclude SWAN from negotiating a contract outside of that negotiated by the Illinois State Library.

Migrate RAILS Hosted Servers to SWAN Infrastructure

SWAN transitioned its ticketing system, support site, and single-sign-on service out of the RAILS network and into SWAN's Azure infrastructure by June 30, 2021.

Migration of all RAILS hosted services including OTRS ticketing system, Drupal support site, and mailman subscription lists were migrated in early 2021. RAILS support of these services was discontinued in June 2021. All of these services are now hosted in our cloud infrastructure.

Replace SWAN Automated Voice Notification

SirsiDynix Voice Automation reached end of life and was replaced in June 2021. SWAN selected the 3rd party solution from Unique Management, using a service called MessageBee. This system could stand in front of any ILS SWAN choses in the future.

Add Three Libraries to SWAN – SWAN100 Project

The public libraries Glenside, Roselle, and Warrenville were added as full SWAN members in December 2020. The project was funded by RAILS Catalog Grants to cover one-time costs. Mapping of item types which drive circulation and holdability followed consolidated recommendations as prioritized by the Clarity Task Force. This group of libraries will serve as configuration models for other libraries moving to a more streamlined use of policies. These libraries are the first in SWAN to use BLUEcloud Acquisitions in production.

Develop Audio-Visual Item Type Recommendations for SWAN100

We established a standard set of audio-visual item types for new libraries joining SWAN. Sam Dietel created the standard set of AV Item Types for Symphony and used that during the data mapping phase with Glenside, Roselle, and Warrenville Public Library Districts. Consultations will continue with libraries wishing to move towards this consolidated set of audio-visual item types.

Establish Uniform Parameters for Fine Free

SWAN developed a uniform set of guidelines to provide a consistent staff and user experience in implementing fine free policies across the SWAN consortium. SWAN staff are consulting with libraries to review circulation rules, holdability, item types, user profiles, and bill forgiveness during the process of implementation for a library. The guidelines are all posted on the SWAN Support site. In addition to guidelines established in early March 2020, Fine Free For Now options were introduced during COVID-19 closures allowing libraries to quickly transition to temporary use for patron service.

As of September 2021, Fine Free For Now options were no longer available. Libraries returned to pre-COVID circulation rules or adopted permanent fine free rules. As of November 2021, 59 of 95 SWAN public libraries are fine free.

Pilot BLUEcloud Acquisitions and Baker & Taylor Rental

SWAN implemented BLUEcloud Acquisitions into SWAN's production BLUEcloud environment and conducted a limited rental program with Baker & Taylor to target high demand holds introducing additional copies into circulation. This pilot is intended to test BLUEcloud Acquisitions in production, maintaining close working collaboration with SirsiDynix development team and a major SWAN library vendor. In addition, implementation of Baker & Taylor rentals provides a controlled test of introducing needed copies to meet high demand within the consortium. SWAN now has a contact with Baker & Taylor for rental copies. The first order of rental items were placed in August 2020. The next order will be created and placed using BLUEcloud Acquisitions. Items selected are based on high demand holds and are immediately holdable for any patrons. These items will be continuously shared, with opportunities for testing roaming collections. When circulation demand ceases, the items will be returned to Baker & Taylor.

As part of the rental subscription, a set number of items can be retained permanently. In collaboration with our book club kit pilot, popular titles once removed from SWAN item circulation are re-deployed to support book club kits. Currently Geneva Public Library is working with SWAN to supplement book club kits with targeted copies, giving these resources renewed use and extended sharing across the membership.

Build "Your Library Statistics" Monthly Report

The BLUEcloud Analytics platform has a lot of capabilities for revealing consortia-wide resource sharing as well as the individual library performance. We will create a uniform "Your Library Statistics" showing performance and activity of the collective, as well as individual library contribution to the whole. Sharing this data monthly and/or quarterly will help strengthen the collective identity.

As of July 2020, libraries receive a consolidated Monthly Snapshot in PDF format. This report shows circulation activity throughout the consortium, with a local focus across three dimensions: 1) item library – what items in library's collection/items circulated, 2) station library – what was the activity within the library for staffing, 3) user library – where did a library's patron go to checkout material and where was this material supplied from. These reports provide a numeric and visual presentation of the who, what, where associated with evaluating circulation activity. It also includes a percentage

comparison across the SWAN consortium. The PDF reports are now being delivered to member libraries via email each month.

Implement Book Club Reservation System

In 2021, Helen Pinder, Resource Sharing Consultant teamed with Lauren Maxwell, Geneva Public Library and Lizzie Matkowski, Downers Grove Public Library to implement KitKeeper as a shared reservation system for book club kits. Shared processing flows, cataloging standards, and kits assembly guidelines were developed by the pilots - https://support.swanlibraries.net/documentation/83064.

The project is now open to any library wishing to participate in sharing book club kits. Training sessions and demonstration have been conducted. Oak Lawn Public Library and Westmont Public Library are currently onboarding.

Implement Pseudo Libraries for Drive-Up and Locker Pick Up

In June 2021, seven libraries (Downers Grove, Indian Prairie, Geneva, Glen Ellyn, Oak Park, St. Charles, Villa Park) launched pseudo library locations to support drive-up windows and lockers. Special processing instructions, analytics, and enhancements to the online catalog for patrons to select these locations were developed. The work and success of this project was shared by the group at SLUI (SirisyDynix Library Users of Illinois) in the fall.

Automate Monthly Removal of Inactive Patron Records

As of September 2021, an automated monthly removal of inactive patron records is processed. This transition to an automated process allows libraries to review and update patron records before they are eligible for removal the next month, if desired. This automated process eliminates the previous annual process, providing a more consistent work pattern for library staff and leveling of patron counts for reporting purposes.

Protecting personal identifiable information is critical to SWAN. Removal of inactive records helps protect our patrons' privacy and minimizes potential for security breach.

Provide Recommendation on Marketing Automation Platform for Libraries

The COVID-19 pandemic has revealed a deep need for SWAN member libraries to have a set of tools for digital marketing directly with library patrons that goes beyond a weekly newsletter. The SirsiDynix Community Engagement Platform is a new component of the SirsiDynix Library Services Platform. Patron Point is another service with wide adoption, including the CLEVNET library consortium. Aaron received demonstrations and interviewed customers of Patron Point and OrangeBoy Savannah. Also included in demonstrations is the just released SirsiDynix CEP, and the OCLC Wise platform. A whitepaper was presented at the December 2022 SWAN Quarterly.

Continue BLUEcloud Staff Interface Pilot & Targeted Deployment

Maintain ongoing SharePoint project repository and active participation in SirsiDynix Strategic Partners Program (SPP), including staff from SWAN member libraries. Provide Member Update Sessions with new releases and assignments to member participants. Expand participation as product feasibility addresses niche services areas. Phase II pilot of Circulation targets public service staff. SWAN provided an online portal for the libraries participating in the BLUEcloud pilot and two online meetings took place to provide updates. The SWAN pilot of BLUEcloud Staff has Eisenhower Public Library District using the BLUEcloud Circulation at its circulation desk by library staff. The Eisenhower pilot was on hold during the pandemic. Bibliographic Services expanded the initial pilot of BLUEcloud Cataloging during the pandemic in April 2020. In November, 2021, Circulation Advisory members tested circulation functionality and completed a gap analysis shared with SirsiDynix developers. In January-February 2022, templates for pre-cats were developed and deployed to cataloging pilots libraries.

SWAN continues to provide the SirsiDynix SPP updates with interface changes and member library requests/suggestions.

Support & promote the EBSCO Group-Purchase

SWAN provided centralized management and configuration of databases, including links for remote access use. The responsibility of SWAN is to serve as a centralized point-of-contact for sales and contract renewal, centralized support and troubleshooting – through SWAN help/ticket system.

We provided instructional support through library subject guides and online tutorials, accessible from the SWAN patron website. This entailed online training for library staff in use of resources, including targeted resources to assist library staff in collection development, reference, and readers advisory (working in collaboration with SWAN member library experts). SWAN provided training and support in reporting statistics; consortium-wide statistical analysis. SWAN also continued collaboration with RAILS and the Illinois State Library to expand access to electronic resources with significant cost savings.

In 2022, the EBSCO group-purchase has each library's databases listed on the SWAN patron help site under the "Articles & Databases" category. Promotional material was provided to libraries as graphics to be shared online. Online training has been provided and is available as an on-demand video on SWAN Support.

Form School & Public Library Task Force

SWAN public libraries have long developed and supported collaboration with public and private schools in their service area. The challenges of these times call upon expanding this collaboration. SWAN's public libraries have increased access to electronic resources through virtual programming, and the group licensing of EBSCO research databases has increased access to electronic resources and opportunities exist to leverage the SWAN resource sharing consortium to extend virtual access for children and students.

During 2020, additional documentation and shared practice was developed for supporting teacher cards, out-of-district students, and students within the SWAN membership. Working with our SWAN

library member, Bensenville School District #2, SWAN has entered into an IL-NDPA (Illinois - National Data Privacy Agreement) with Bensenville School District #2. This agreement is a master agreement with BSD#2 which other school districts may "piggy-back" on this original agreement.

Objective 3: Reconstitute as a Mission Driven 501c3 with Clear Representative Governance Practices

Evaluate Organization Legal Entity

Executive Director will work with legal counsel on 501c3 implications to organization, employees, membership, services

- Findings of conversion from Illinois Intergovernmental Instrumentality presented to SWAN Board
- SWAN Board creates Governance Study Committee with written charge with a goal to provide recommendation on organization governance and leadership
- Executive Director implements changes in SWAN operations for accounts payable/accounts receivable.

SWAN has experimented with its governance structure and representation over the 44 years of its existence. The membership in 2006 formed a Governance Study Group comprised of member library directors/administrators and provided recommendations that were enacted. Based on the success of that approach, the SWAN Board should form an official committee with board and membership representation.

Revise SWAN Budget Structure

The FY18 audit management letter recommended SWAN create accounting funds in addition to the operating budget fund. The SWAN budget fund structure with goals of segregated operations, grants, capital improvements, and collections was completed as part of the FY21 SWAN budget.

Objective 4: Increase Presence of Patron Experience

Develop & Deploy Online Patron Registration

Develop and implement the ability for patrons to register online for a library card.

Develop & Incorporate Patron Help into Public Catalog

Redesign patron facing website into a patron-focused help system, providing a platform for instruction, linked from the online public access catalog.

Develop Accessibility Standards

SWAN is committed to providing accessible software and services to our member libraries to serve people with a wide range of hearing, movement, sight, and cognitive ability. In September 2021, our Accessibility Statement was published which includes evaluation of products for accessibility, education and training, and working with partners to address any accessibility issues.

https://support.swanlibraries.net/node/87821

Objective 5: Strengthen the Collective Identity

Pilot Online Membership Forums

The SWAN Community Forums was rolled out in 2019 and is now available for all SWAN user groups.

Plan SWANx19 Event

The annual user group SWANx19 theme was rebranded as SWAN eXpo. The event feedback and results was shared at the September 2019 Quarterly membership meeting.

Clarify Role of SWAN Advisory & User Groups

SWAN provides library staff networking and advisory opportunities. The role of these should be clarified for the membership in 2019. Any changes will be incorporated into the 2020 calendar year schedule. Refer to the User Groups detailed on the SWAN Support site:

https://support.swanlibraries.net/meetings-trainings/user-groups

Hold SWAN eXpo Web Series to Substitute 2020 Event

The in-person event held at Moraine Valley Community College was instead converted to a series of webinar sessions recruited from member library staff and SWAN staff. The web series was held from April to June and recordings are posted online. Nine sessions were held from April-July, 2020. Outside speakers presented 3 sessions, SWAN staff 3 sessions, and SWAN member library staff 3 sessions for a balance of topics ranging from cataloging, collection development, technology, and virtual services during pandemic.

Convene Monthly Fireside Chat Sessions

Starting in March, 2020, SWAN has offered weekly, bi-weekly, and now monthly membership gatherings. These initially served as a vehicle to communicate urgent news during the pandemic and have grown into monthly recaps of projects and happenings within our SWAN community. Input from members indicate that these sessions are of value and help keep us connected and working towards shared goals.

Objective 6: Seek External Funding Options to Support the Research & Development Initiatives of SWAN

ARPA grant investigation

The 2021 research on American Rescue Plan Act (ARPA) benefited SWAN in that the funding sources could potentially be future sources for revenue beyond ARPA. A webinar with John Chrastka from EveryLibrary "How to access maximum ARPA funds" was particularly helpful in understanding the funding opportunities ARPA provides.

Due to the reconciliation method by which ARPA was passed by Congress, the funding went to existing agencies rather than creating new agencies or entities. This means that if SWAN were to prepare and apply through various funding agencies for ARPA, we would have at least at the minimum created pathways for future funding for the organization.

The Illinois State Library announced grant programs that utilize ARPA funding.

1. Bouncing back from the pandemic: developing resources for the local workforce (due August 15, 2021)
2. On the road to recovery: transforming library spaces (due August 15, 2021)
3. Expanding digital inclusion: transforming library services (due August 15, 2021)

In 2021, the State Library did not have any LSTA grants currently open for application, but SWAN could potentially apply for an ARPA grant. The State Library suggested the Expanding digital inclusion and the On the road to recovery grants; "SWAN is one agency with one building, and whatever you propose would support SWAN members recovery from the pandemic."

SWAN ultimately chose not to submit a grant through the Illinois State library.

Library Pandemic Response & How ARPA Funding Can Help

SWAN organized discussions with library directors in June 2021. These meetings were organized by county region and represented 15 libraries. These were attended by public library directors or designated library staff, although they were open to all library types. The meetings were held online and facilitated by SWAN staff with a set of questions intended to get the discussion and brainstorming going on what impact the pandemic had on their community and how ARAP funds could help their library and region's response.

<u>Summary of Need</u>

The discussions with library directors revealed 6 common themes throughout the SWAN region.

1. Improve Community Access to Broadband

- The pandemic has exacerbated the lack access to high-speed broadband in the metropolitan area

- Hot spots are in high demand use, and the supply of them is limited

    o Tech Soup purchasing has wait lists or is limited supply

    o Checkout periods are too short for some users to address the need to provide internet access at home

- Public libraries expressed a desire to have a Wi-Fi signal that extends out from the library to an area that the community could use

2.   Address Mobile Technology Needs

- Libraries were not designed for a mobile workforce

    o Mobile devices such as laptops have been difficult to justify as a purchase versus desktop computers that fit within library budgets

    o Adoption of cloud-based applications, e.g., Microsoft Office365, is slow

- Library networks are not necessarily capable of supporting remote work for staff

    o Library networks are not designed for remote access by staff to connect to apps only available locally at the library building

- Library networks struggle to support Wi-Fi usage beyond the public library facility walls

    o Upgrading and repositioning of access points required additional funds and trustee approval

3.   Support Flexible Library Programming & Events

- Support for outdoor activities and facilities to support them

    o (E.g., Projector for outside display of neighborhood movie night)

- Homebound patrons were isolated during the pandemic

- Library staff visits to senior centers was curtailed by those facilities to prevent spread

    o Provide virtual reality goggles to support learning and entertainment experiences for homebound https://www.myndvr.com/

    o Partner with AgeOptions for programs and classes https://www.ageoptions.org/

4.   Support Expanded Collection Development

- Public libraries and school districts would like to purchase multiple copies of award-winning titles for students

- During the pandemic, SWAN experimented with centralized ordering of "rented" copies of popular titles from Baker & Taylor

5. Support for Flexible & Evolving Space Needs

- Evolving public space utilization has libraries using more tables for 2 person meetings for tutoring, local business meetings, while large group meetings remain limited
    - o Provide more small tables to libraries through a regional group purchase
- Creative space plans for children services remains a source of concern, as children are not vaccinated
    - o "WeeWork/WeePlay" ideas – what does safe space for children look like and can those wee-spaces be deployed throughout the library (e.g. individual reading nooks, outside spaces) [e.g., https://www.schoolsin.com/ang-ang9002.html?gclid=Cj0KCQjw8IaGBhCHARIsAGIRRYqF3UEUN6xyEPPWTGcIVkif9ffE4EGN5_Mv4hrVDYOTRbIL5KhCGXoaAuc_EALw_wcB]
- Alternative methods of material pick-up and delivery – libraries would like to do more of these services if funds were available
    - o Install library lockers, both at the library and within the community
    - o Space redesign to support drive-up window
    - o An "UberEats" delivery vehicle for ordering up a delivery of resources from the library
- Ventilation and outdated HVAC systems were exposed as major problems for some libraries during the pandemic
    - o Building infrastructure needs grant funds to quickly improve the HVAC

6. Staff Needs

- Revising library positions to comply with Federal and state guidelines, incorporate DEI initiatives, and the changing landscape of minimum wage in Illinois
    - o Organizations like HR Source could be funded to assist libraries with a coordinated, regional effort to reassess position descriptions, conduct benchmarking paygrade analysis, and incorporate DEI and grade shifts for minimum wage changes
- Improving skills for remote work and virtual programs is needed
- Staff want to build on new skills acquired during the pandemic

Possible Solutions

- Circulate a shared collection of hotspots for all 100 libraries

Funding would go towards hotspots for libraries to check out to patrons to provide home access to high-speed bandwidth. The hotspots would be purchased and managed centrally by SWAN using contracted staff or vendors. The lending of hotspots for established length of time would be based on a ratio of

demand. This would allow libraries in SWAN to bridge the gap for needed internet connections for families needing online learning, and the isolated elderly.

- Acquire mobile laptop equipment for libraries

Funding would purchase a large collection of laptops or mobile devices such as Chromebooks for the 100 libraries in SWAN for check-out at all member libraries.

- Universal access card

Public libraries could extend services to any student of a school district supported by a public library. Patrons from any library could be eligible to use consortium-supported equipment without a use fee.

- Centralized ordering of book collections

Funding would go towards a common book collection for all libraries in SWAN. SWAN has the capability to centrally order material available for public libraries in SWAN with school districts within service areas.

- Provide human resources help for libraries to retool employee positions

Funding would go towards needed help and guidance in human resources for library administration struggling to find footing within a shifting landscape of staffing.

- Mobile workforce redesign

Funding would go towards libraries purchasing new equipment, improving network designs, which promote remote access to library applications for staff to have flexible working arrangements.

Other Opportunities

- Will County Hackerspace

Two libraries in Will County shared a need for expanded space within their libraries for additional makerspace tools, such as Cricket Machines and devices that generate dust. The libraries in the region should consider a shared space for makerspace programs. The hackerspace in the area recently closed and there is an opportunity to address the need jointly.

- Explore More Illinois

Libraries shared that some cultural institutions could benefit from participation in Explore More Illinois.

- Community Engagement through Technology

Using the model of Daniel X. O'Neil and the Smart Chicago Collaborative, The CUTGroup Book, this Civic User Testing Group focuses on engaging the community in user testing of applications and data. With the deployment of digital resources, extending this model throughout the SWAN membership may help identify trends and needs of our shared library community.

External Funding Options Research

In 2021, as part of the SWAN strategic plan [objective 6](#) "Seek External Funding Options to Support the Research & Development Initiatives of SWAN" I initiated a conversation with John Chrastka, President of EveryLibrary, a national organization that is based in Illinois.

Here are some of the observations and ideas from that discussion.

- ALA could improve its leadership on policy to improve federal funding from multiple agencies, whereas currently IMLS is solely relied on for library funding grants.
- SWAN should consider a shift in semantics at the leadership level towards "equalization" of library service for the region it operates within.
- "Tax equalization" arrangements that exist in Colorado and Minnesota should be researched and could serve as possible Illinois funding for entities and organizations like SWAN.
- Federal funding comes from three primary sources: (1) federal contract, (2) disaster relief, or (3) a competitive grant.
- SWAN, as a regional infrastructure to provide public information throughout the public libraries, is a potential source of ongoing federal funding, e.g., HUD education on lead poisoning.
- ARPA funds are moving through county agencies to districts and towns. The next crisis could emerge in 2025 as this ARPA funding is used up, and municipalities are forced to consider cuts to libraries.
- Nothing in the Illinois library landscape changes unless there is a crisis, e.g., library system consolidation in 2011 because of the Great Recession.
- SWAN should look towards provisions within Illinois to legally fill in the underserved and unserved gaps, using equalization to get these populations enfranchised; SWAN should explore and exploit this mechanism.
- Chicagoland area is essentially under a single media market, so it is very perplexing that there is no brand identification for public libraries in the city and suburbs; more effort could be put into a unified public message.
- SWAN should consider its position as a conduit for funding to its libraries, or as an aggregator for funding for libraries.
- "What do libraries need right now?" might be answered with "help from a trusted and known entity."
- Municipalities might consider SWAN as the entity to legally run multiple libraries, rather than seeking mergers into districts.
  - "Privatizing" libraries is a pitch that has appealed to county commissioners, as a public-private partnership
  - Library Systems & Services (LSS) has shown success in this area (but is also pilloried by the library profession)
  - Running the library is a service that SWAN could explore or be prepared to move forward with as legitimate option if the funding crisis hits in 2025.

We discussed other states to look to as guides to see what is legally possible. Colorado and Missouri have a similar mix as Illinois of municipal libraries and districts. Ohio is very similar to Illinois in its population, but has a much different ratio of local, state, and federal funding. John cited IMLS Public Library Statistics from FY2019 to see the stark difference of how Ohio manages funding at the state level versus Illinois. Illinois also has 2.5 times more public libraries than Ohio, which dilutes Illinois libraries' ability to deliver cohesive services.

Table 7. Total operating revenue of public libraries and percentage distribution of revenue, by source of revenue and state: Fiscal year 2019

State	Number of public libraries	Total operating revenue								
		Total	Federal[1]	State	Local	Other[2]	Federal	State	Local	Other
		(In thousands)					Percentage distribution			
Total[3]	9,057	$14,200,729	$39,245	$947,607	$12,197,578	$1,016,299	0.3	6.7	85.9	7.2
Colorado	112	346,011	734	1,798	320,477	23,002	0.2	0.5	92.6	6.6
Illinois	623	878,783	2,363	31,287	799,248	45,885	0.3	3.6	90.9	5.2
Missouri	149	300,794	2,256	3,743	274,876	19,919	0.7	1.2	91.4	6.6
Ohio	251	918,327	427	409,707	425,179	83,015	#	44.6	46.3	9.0

Rounds to zero.

[1]This includes federal funds, such as Library Services and Technology Act (LSTA) funds, that are distributed to public libraries through state library agencies. Other federal funds that are used by state library agencies or library cooperatives to provide services that benefit local public libraries are not included in the table because they are not received as income by public libraries.

[2]This includes monetary gifts and donations received in the current year, interest, library fines, fees for library services, or grants.

[3]Total includes the 50 states and the District of Columbia but excludes outlying areas, libraries that closed or temporarily closed in FY 2019, and libraries that do not meet the FSCS Public Library Definition. NOTE: Detail may not sum to totals because of rounding. Data were not reported by the following outlying area: Puerto Rico. Missing data were not imputed for nonresponding outlying areas. Additional information on nonsampling error, response rates, and definitions may be found in Data File Documentation Public Libraries Survey: Fiscal year 2019.

SOURCE: IMLS, Public Libraries Survey, FY 2019. Data elements TOTINCM, FEDGVT, STGVT, LOCGVT, OTHINCM from the Public Library System Data File (PLS_AE_PUD19i) were used to produce this table.

FIGURE 1 IMLS TABLE 7 FOR FY2019 COMPARING COLORADO, ILLINOIS, MISSOURI, AND OHIO

It is also possible for libraries to expand our organizing and funding pathways through interstate mechanisms, such as the Interstate Library Compact (32 states participating, 1970's origin). Other examples shared were water rights agreements between states in the Great Lakes region. Lastly, we discussed the need for some library "think tank" of similar entities like SWAN. The organizations Minitex (MN), Library Link (NJ), and CLC (CT) were noted as leaders to approach for seeking ways to provide library services and obtaining funding.

Additional grant funding activity 2021:

• Completed access to State Library Technology and LSTA grants

• Reviewed FEC guidelines for the Emergency Connectivity Funds

• Reached out to Illinois State Library E-Rate Coordinator

• Reached out to Illinois State Library Grants & Programs

National Endowment for the Arts Grant Submitted

SWAN submitted an application for an NEA ARPA grant on Monday, August 30th (deadline was September 2nd noon). This grant was a request for $150,000 funding for a 2-year program to support the literary arts with stipends for authors set within library reading programs and events. SWAN was not awarded the grant.

Below is an excerpt of our description that was used in the application.

Expanding Appreciation and Participation in the Literary Arts

Libraries have traditionally promoted and encouraged literary arts in their collections and programs. As a consortium of 100 libraries, SWAN Library Services is expanding support and promotion of these shared programs through our shared community of literary artists, library staff, library patrons and students who participate in reading, writing, and creation. Known for resource sharing of physical collections (over 2 million interlibrary loan and 1.5 million reciprocal borrowing transactions annually), our library community is well-positioned to extend sharing to event planning, promotion, scheduling, and staffing.

During the past 18 months, disparities in our diverse shared community have been magnified. All libraries have struggled to maintain virtual programming and provide ways for library users to continue to receive material and services. Online author visits and book discussions have continued, strong in some communities, but difficult in our more economically stressed neighborhoods. Our wide geographic base, shared technology, and acquired skills in virtual programming now allow us to better support sharing of not only books and media, but experts and artists across our entire shared network. Through shared programming, promotion of events in our online public catalog and apps, and support of artists via stipends, we can bring these artists to all communities in SWAN.

Starting in January 2022, SWAN Library Services will be supporting a consortium-wide marketing and tracking program for reading and writing goals and public programming of author series, book discussions, and guest author instruction. Each month of the program will feature topics and authors, including guest author visits, across the metro-Chicagoland area we serve. These shared programs and resources will be promoted through our online public library catalogs, as well as through Beanstack. Beanstack is a reading challenge promotional tool used by 44 of our 95 public libraries currently. All libraries will have access to Beanstack through this shared project.

We included Beanstack licensing for all SWAN libraries as part of this proposal based on the heavy adoption rate of our libraries.

The NEA application process required SWAN to complete several important steps that will serve the organization positively for future grants.

- Registered for grants.gov and sam.gov
- Acquired DUNS (Dun & Bradstreet), CAGE (unique identifiers for entities that do business with and/or seek financial assistance from the U.S. federal government), MPIN (Marketing Partner Identification), UEID (Unique Entity ID)

These logins and codes are all stored within SWAN's secure password management system.