SWAN Clarity Task Force

Agenda

Thursday, May 2, 2019, 10:00 a.m. – Noon
SWAN Headquarters
800 Quail Ridge Dr
Westmont, IL 60559

1. Introductions & Welcome
2. Review Notes from April 3, 2019 Meeting
3. Clarity Task Force SharePoint – Steven
4. Data requirements for good decision-making
   a. OLS Collection HQ demo – Ang
   b. Discussion on analytics and needs of membership
5. Role/time-commitments of members and SWAN staff in development efforts
   a. SirsiDynix Strategic Partners Program – BLUEcloud Acquisitions Phase III Pilot
   b. BLUEcloud staff client: BLUEcloud Circulation & BLUEcloud Cataloging
   c. Roadmap – fitting in specific library requests into SWAN-wide planning
6. Communication/Integration of Advisory/User Groups, Board, and members
   a. Review of existing groups/meetings
   b. Discussion: overlapping work and collaboration – how can SWAN advisory, users groups, board and directors embrace a shared vision/workplan?
7. Calendar Setting (Date/Time/Place) through June 2020
   a. Next meeting: Wednesday, June 5 (10-12) -
   https://www.librarylearning.info/events/?eventID=28763

Task Force Membership:

1. Kerry Halter, Technical Services Manager, Batavia Public Library District
   khalter@batvaiapubliclibrary.org
2. Kristina Howard, Adult Reference Manager, Tinley Park Public Library
   khoward@tplibrary.org
3. Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, MKurczak@messengerpl.org
4. Cindy Maiello Gluecklich, Director, Melrose Park Public Library
   maielloc@mpplibrary.org
5. Amy Prechel, Head of Access Services, Downers Grove Public Library
   aprechel@dglibrary.org
6. Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library
   aromano@olpl.org
7. Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library
   asievers@elmwoodparklibrary.org
8. Colleen White, Cataloging Librarian, Oak Park Public Library
   cwhite@oppl.org

SWAN Staff:

- Dawne Tortorella, Assistant Director, Chair
- Aaron Skog, Executive Director
- Scott Brandwein, Bibliographic Services Manager
- Steven Schlewitt, Information Technology and Support Services Manager
- Tara Wood, User Experience Manager

SWAN Clarity Task Force

Notes

April 3, 2019, 9:30 a.m. – Noon

Introductions

Based on the group introductions, we drew the group composition from advisory groups and participation in user groups.

Task Force Membership:

1. Kerry Halter, Technical Services Manager, Batavia Public Library District
   khalter@batvaiapubliclibrary.org
2. Kristina Howard, Adult Reference Manager, Tinley Park Public Library
   khoward@tplibrary.org
3. Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, MKurczak@messengerpl.org
4. Cindy Maiello Gluecklich, Director, Melrose Park Public Library
   maielloc@mpplibrary.org
5. Amy Prechel, Head of Access Services, Downers Grove Public Library
   aprechel@dglibrary.org
6. Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library
   aromano@olpl.org
7. Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library
   asievers@elmwoodparklibrary.org
8. Colleen White, Cataloging Librarian, Oak Park Public Library
   cwhite@oppl.org

SWAN Staff:

9. Dawne Tortorella, Assistant Director, Chair
10. Aaron Skog, Executive Director
11. Scott Brandwein, Bibliographic Services Manager
12. Steven Schlewitt, Information Technology and Support Services Manager
13. Tara Wood, UX Manager (absent)

Review Task Force Charge

Dawne lead the group through the written charge. What the consortium is trying to do is to research the current problems. As we surface these problems, down the road we will be reviewing the SD roadmap as solutions are planned.

Strategic Plan Review – Role of Task Force in Process

Aaron reviewed the entire plan, with the focus on Objective 1.

Cindy agreed that the problems are coming from multiple areas and will require group input. She anticipates this will be a lively group!

Identifying Issues – Surfacing the Shared Diagnosis

Dawne reviewed the single page chart in the packet. These were divided into four areas:

- Learn & Share
- Frame the Issues
- Test & Measure
- Gather Intelligence/Insight

The group conducted an exercise and answered the following questions. These were shared in the group and written on notes gathered by SWAN staff.

If you could make one immediate improvement to your library's operations which rely on SWAN's library technology infrastructure, what would that be?

Group discussion identified the following:

- No interruption of service (e.g. Enterprise instability)
- Placing holds in WorkFlows is difficult.
- Need a universal PIN in Enterprise for library staff to place holds for patrons, i.e. the prior OPAC WebPAC had a "no-PIN" access exclusive to library staff.
- WorkFlows is cumbersome, so Enterprise search is often preferred, and is best for patron instruction.
- Enterprise Searching – desire for lexile or book level searching – not a common problem, but really hard to help when asked about this
- Enterprise Searching improvement in search results and ranking
- WorkFlows item searching (need ability to sort fields) and patron searching (search by partial name)
- Easier procedures: the ILS Acquisitions process increased in complexity for New 19 libraries that joined SWAN.
- Consistency: the preference to allow libraries options should have more emphasis on consistency. The example is a long list of codes with multiple options. This helps part-time or clerical staff with cutting back on the myriad of choices.
- Consistency with Article Search across libraries.
- Gaps in eResources that are not part of the Enterprise catalog searching via eRC
- BCA Reports, but there is reluctance to talk about it! BCA requires too much handholding
- Collection HQ is being used to get reports that should come out of the ILS.
- Creating BCA reports to answer questions on the collection is inefficient. Asking this from SWAN staff or creating another report just to answer this one-time question is frustrating.
- Collection analysis where the local use of the collection is differentiated from the usage of the collection by other consortia library patrons.

- BCA data criteria is not clear, seems duplicative.
- Automatic updates for WorkFlows client software.

When you run into a problem related to the SWAN consortium, what is your first course of action? Second? Last resort?

Group shared:

- Emailing SWAN support, which is very responsive (Colleen)
- At some libraries there is a go-to person on the staff who is on a lot of SWAN advisory/user groups; essentially the point person at the library (Kristina)
- Formalized the point-person within the library to send the support ticket (Angela)
- There is a triage of diagnosing the issue prior to sending the ticket to SWAN (Amy)
- Sending in the ticket is the first choice, rather than troubleshooting locally (Ahren, Ang)
- It depends on who they are dealing with at the library, then checking the support site (Cindy)
- Checking around in-house first, perhaps with the neighboring libraries (Kerry)
- Communication in responding to tickets is not the problem (Kerry)

What would your colleagues at your library answer?

- The cataloging department typically discusses an issue internally first, then bringing this to the manager, and then bringing it to SWAN (Michelle)
- Some of the staff do not understand the problem, or can even say "this is weird" and therefore report nothing (Angela)

Are there any internal tracking systems at your libraries? Formal, informal?

- IT has something, PR/marketing has something, but nothing pertaining specific to SWAN software issues (Amy)
- Emails are just saved and then searched (Amy)
- Was expecting more in the ILS a local login specific to the person to be able to track the issues within the ILS so that it could be used to diagnose and correct the issue with the staff (Cindy)
- Common logins are helpful in other ways—shared settings, experience, which helps instruction (Kerry)
- Staff tend to ask first, and then get input/guidance to send in the SWAN support ticket (Michelle)
- Using the help@swanlibraries.net is often used and is the easiest way to send in a ticket. Sometimes there is a reluctance to send in an issue (Ahren)
- At a larger library, having a point person helps control the flow of information (Angela)
- The downside of having only managers handle specific issues, e.g. if there is a circulation problem, the head of circulation should be contacting SWAN—but if they are on vacation, what should be done? Who takes over, steps on toes? (Michelle)
- Sometimes the issues are not just a department, but a function that does not reside in a department (Amy)
- Sometimes the problem is just not a problem! (Angela)

- First steps are to look at it very closely, and it might be understood as not a problem, e.g. a patron was cancelling the hold and the staff kept placing it, and the patron kept cancelling it, so no problem existed for SWAN to solve (Amy)
- Smaller libraries have part-time staff won't catch the email, and then send in the ticket, when, they might have been doing it wrong (Cindy)

What are areas of support or problem reporting that is not effective? Areas where it is not successful in getting a problem solved?

- When the library does not report a problem, and accepting/assuming it is a limitation of the system. (Ahren)
- When the ILS issue begins to bleed into a vendor, such as the configuration that requires a 3rd party involvement (Ahren)
- People are not educated enough to send in the ticket. Most staff do not have an idea of when to send in the ticket. (Angela)
- Cannot figure out something going on, or needs a change to take place because they cannot resolve it locally (Amy)
- Is there a means to send in enhancements to SWAN, and not knowing this shows there is clearly an issue on needing to escalate more formally within SWAN. Some ticketing systems can turn this into an enhancement request—Envisionware is a good example of this. (Ahren)
- The SD Enhancements forum with voting and polling exist, but who has time to do this? (Amy)
- Dealing with SirsiDynix is SWAN's role, not really a local problem, which can be a good thing for a consortia member (Ahren)
- Even the SirsiDynix Enhancements could be misleading because not understanding how it fits into SWAN leads to uncertainty in participating in the Enhancements forum (Amy)
- Having granular logins and permissions was seen as a benefit prior to the migration to Symphony. This was likely due to some decision at SWAN to continue with shared logins (Ahren)
- The WorkFlows reports removed are missed. (Amy)

List 3 ways you like to collaborate with colleagues.

- Sit down face to face meetings is #1, particularly with stakeholders at the start of a project to see how things are going to go—with snacks! (Amy)
- Face to face is much preferred as the #1 (Angela)
- Working together on a document asynchronously, online using Google Docs, Office365 (Colleen, Ahren)
- Having action items assigned to different people—clear delegation and deliverables (Angela)
- Effective meeting management—doing the work at the meeting may not be the best choice (Michelle)
- Do all of the thinking prior to the meeting, and arriving prepared (Amy)
- Agendas sent out prior to the meeting, not 30 minutes before (Angela, Michelle)
- Having a clear person that is chairing the meeting—a clear hierarchical structure (Angela)
- Who is doing the talking and notetaking is understood ahead of time (Amy)
- Running a good meeting is an important skill (Michelle)

- Having a mission, a goal, and knowing what you want to get out of it (Michelle)
- You don't want to spend 3 hours complaining about something. You can spend time with your staff prior to the meeting, gathering information. Having a point person, an agenda. It can be understood who should go to the meeting depending on the topic. (Cindy)
- Email and message boards online are good when tracking a thread. (Michelle)
- Visual aids as an example of where to place labels, recommended practice. (Amy)

Give a consortium a rating of 1-5 on how the areas of collaboration are? (5 is great)

Face to face: 4, but only if you are going to the meeting!

- Not knowing what is going on the advisory groups
- Public services folks do not care about what technical services/IT is doing unless there is a problem
- The IT and technical services are important
- Finding the time to get away (meetings, story time, time budgeting math to decide to go)
- Buy-in factor is important to allow staff to attend
- Trading off who goes in order to provide coverage back the library

Pre & post meeting information:

Agendas/Pre: 5

- SWAN is better, getting these out sooner
- Having everything on a single page
- Knowing ahead of time

Post meeting: 3

- There are times when some agreement is reached
- Knowing what was discussed
- Meeting notes are not typically sent out, only posted to the support site, so it requires an individual's responsibility to find those, so it varies on how well these notes are shared/read
- Having some communication with a link to the notes
- Summarizing the points discussed, e.g. what was discussed

Discussion on the libraries that do not participate and not attend any face-to-face.

- Having directors endorse participation is important
- Communication within the library is important
- Email communication is not always effective—some staff do not even read emails sent by their managers
- There are too many emails! Filtering these is a challenge
- Some local library staff meetings have detailed notes, beyond any usefulness. Which brings up "What should meeting notes look like?" (Angela)

Other means of collaboration identified:

- Online (asynchronous)

- Clear delegation & deliverables
- Email/message board with threading
- Visual aids

Order these characteristics of an ideal library system/consortium.

a) Ease of use/convenience
b) Quality/accuracy of resources and information
c) Consistency/predictability of behaviors and practice
d) Security/privacy of systems and information

Discussion on if this was for staff or patrons—the group thought ranking these separately was important. There were 5 of the group that identified the same ranking.

Results:

	Me/Staff Ranking								Avg	Rank
Ease of use/convenience	3	3	3	3	4	2	1	2	2.63	3
Quality/accuracy of resources and information	2	1	1	1	1	1	3	4	1.75	1
Consistency/predictability of behaviors and practice	1	2	2	2	2	3	2	3	2.13	2
Security/privacy of systems and information	4	4	4	4	3	4	4	1	3.50	4

	Patron Ranking									
Ease of use/convenience	1	1	1	2	1	2	1	1	1.25	1
Quality/accuracy of resources and information	2	3	3	1	3	1	3	2	2.25	2
Consistency/predictability of behaviors and practice	3	2	2	4	2	3	2	4	2.75	3
Security/privacy of systems and information	4	4	4	3	4	4	4	3	3.75	4

6. What do your colleagues throughout the library most complain about in relation to SWAN?

- WorkFlows is confusing, how to place holds
- How Workflows works
- WorkFlows is slow
- High demand holds (this report is hated)
- Inability to do things in consistent practices
- Mandates staff do not agree with
- Circulation is a different world—the most retail position in the library, and they get the most abuse, so the philosophy of "Saying yes to everything" as a way to improve patron experience was passed on to share with Clarity Task Force as something SWAN should adopt

- Consternation around the nature of the consortium and fitting within the rules—the issues arise for this, such as the replacement cost for magazines in the ILS, or kids getting on the computers with a library card that was created by another SWAN library with a simple 1235 PIN
- Not all new titles available for holds is a huge patron frustration
- Enterprise showing only the items available, on shelf
- Kids DVDs were going into the wrong AMH bin was based on the boxed sets – inconsistencies of individual libraries impacts automated processes in others

7. What are your colleagues throughout the library most complain about in relation to SirsiDynix?

- The standalone ILS mentality within a shared consortium ILS reality
- Technical limitations within the ILS—at libraries encountering a checkout based on a different Itype, or that a barcode could be accepted that is really invalid.
- The most heard was BCA—they cannot learn it and there is an unwillingness to learn it due to its complexity. The move to Collection HQ was cheered by staff that no longer had to use BCA.
- The longer BCA is being used, the harder it gets.
- There needs to be a magical report that lists everything and then is narrowed.
- BCA in general
- "What is BLUEcloud? Is it coming? Is it still happening?"
- Self-checks will not allow a checkout of the item if there is a hold on it (this is a setting, but how many libraries are living with this issue?)
- WorkFlows has been a bad interface for a while now.

8. Name up to 3 complaints you hear from patrons related to SWAN services, software, etc.

- Some patrons have no idea SWAN exists, some think of SWAN as responsible for a lot of things at the library, e.g. computer reservations.
- Patron confusion around card usage at neighboring libraries
- PINs are still a problem—resetting these in Enterprise is getting better. But even with some patrons they no longer use email but rely on SMS as a means of communication.
- Local complaints about holds not being notified—it is constant, low-level problem.
- Enterprise presents results in some ways where the holds are placed on the wrong bib. This seems to be a pre-cat issue. The combo packs is as a bad issue, so it is good this is being worked on. The policy regarding not breaking up boxed sets is an example of good movement towards improvement for patrons.
- Patron confusion on Enterprise when placing holds on a new item that is restricted and does not allow a hold be placed on it by a member library.
- There was an issue that is either ongoing or was going to be fixed for Acquisition on-order records and patrons placing holds.
- Library staff will get some abuse from patrons for not having ordered/purchased new items, which ends up being a confusing ILS/Enterprise presentation issue.
- Chicago Public Library patrons and how they are managed within SWAN is difficult.
- Exact title search in Enterprise

9. Provide a suggestion on how SWAN can improve member communications.

- Prioritization of emails
- Dividing SWANcom into categories
- Email digest could be beneficial
- YouTube channel could be expanded
- Chat system in the past was really helpful with some SWAN staff
- Chat within the libraries is being used, but not widely—more with back of the house with public desk staff
- Microsoft Teams is being explored, but this is only effective for those staff that use it, while other staff have no interest in using it
- Intranets are used, but it may not even include SWAN information

10. Share your ideas on how SWAN advisory, user groups, board and directors can embrace a shared vision/workplan.

- This will be a topic of discussion at the next meeting.

11. What things did not pop up that should be pursued further?

- We did not talk about e-resources, databases, Flipster, digital audio: what is SWAN's role within this environment? The differences between libraries is a source of confusion for patrons.
- Acquisitions is still a problem—waiting for reports during business hours has caused extremely inefficient work for these staff.
- Why can't more than one-report at a time be run within Symphony?
- Why are there so many steps in Acquisitions?
- Frustration with SirsiDynix as a gigantic company with resources, but they appear to not have something to deal with the issues facing SWAN libraries.
- How will more patron input be gathered for the Clarity Task Force?
- Oak Lawn is starting a UX group to study patron use of library services 4 times a year, so this could be a group that would be willing to work with Clarity Task Force.

Calendar Setting (Date/Time/Place) through June 2020

- Fridays are bad, Mondays are bad for staff the have desk coverage (Angela)
- Management team meetings are on Wednesdays
- Telepresence would help (Ahren)
- 2nd Wednesday of the month might be better for the morning (Amy)
- Tuesday or Thursday afternoons are bad (Ahren, Cindy)

We need a poll to determine the best day of the month and time slot.

Meeting ended 12:10 p.m.

Respectfully submitted by Aaron Skog

Clarity Task Force SharePoint
https://swanlibraries.sharepoint.com/sites/ClarityTaskForce

Collaborative work space for our Task Force has been set up in SharePoint. This space gives us a place to continue discussion and share documents for further development and sharing.

Agendas, notes, and packets will continue to be posted on the SWAN Support Site for all members of the community to access.

Data requirements for good decision-making

BLUEcloud Analytics is an area of frustration and concern for members. Specific examples include the following:

- BLUEcloud Analytics is difficult to learn; unwillingness to learn due to complexity
- The longer BLUEcloud Analytics is used, the harder it becomes – due to volume of reports and changing interface with updates
- Volume of reports available is overwhelming and difficult to know which reports will provide the information desired
- Individual logins made it difficult to coordinate work and know which reports were scheduled; easier with the shared login
- Desire for a report that lists everything and can be selectively filtered, rather than multiple reports with minor differences
- Desire for standardized reports that all libraries can refer to
- Lack of presentation of data which allows decision-making – more geared towards reporting of counts/statistics

SWAN future direction for BLUEcloud Analytics

Initially SWAN deployed use of BLUEcloud Analytics for each staff member. Over time, this proved to be extremely difficult to manage due staff changes and inability to have a snapshot per library of what reports were scheduled and customized by the library.

Library-specific BLUEcloud Analytics login

In 2018, SWAN established library-specific BLUEcloud Analytics logins to better organize and access reports within a library. Each SWAN library should now be using their library-specific account (e.g SWANLIBSOPS) instead of previously assigned individual logins. Within these library-specific accounts, libraries can establish folders for organizing custom reports and manage subscriptions within a single account.

DGS Example (organized by department):
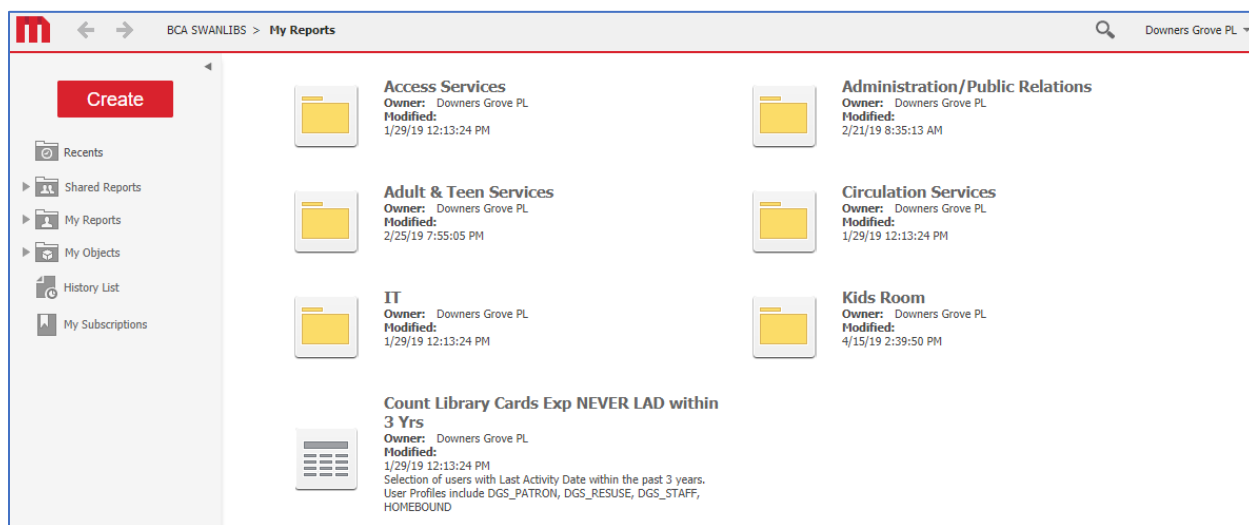
OPS Example (organized by function and staff):

Shared library account enables centralized management of subscriptions.

Composite reporting via BLUEcloud Analytics Dossiers

One goal is to provide libraries with composite dossiers which pull data consistently across the consortium for purposes of statistical reporting, especially required statewide and RAILS reporting requirements.

A dossier is an interactive display that facilitates exploration of business data. They can contain both visual and tabular data. The ILLINET Traffic Study was released as a dossier pulling all the reporting data into a chapter with pages matching the state reporting requirements.

2.4a Requests (Borrowing) from SW…raries

Charging Library	Checkouts
ADS	15,127
AMS	10,580
BBD	60
BBS	1,080
BCS	6,607
BDD	3,421
BFS	24,608
BIS	12,700

2.4b - Requests (Borrowing) outsid… types)

Charging Library	Checkouts
ADS	204
AMS	54
BDD	107
BFS	547
BIS	14
BKS	85
BLD	212
BPS	4

3.4a Supplying (Lending) to SWAN … raries

Item Library	Checkouts
ADS	15,996
AMS	20,909
BBD	151
BBS	35
BCS	3,129
BDD	6,203
BFS	15,630
BIS	14,315

3.4b - Supplying (Lending) outside of…user)

Charging Library	Checkouts
ADS	763
AMS	2
BCS	93
BDD	7
BFS	1,394
BIS	535
BKS	211
BLD	389

4.2a – Reciprocal Borrowing f…atrons

Charging Library	Checkouts
ADS	6,472
AMS	19,181
BBD	2,057
BBS	2,728
BCS	584
BDD	1,013
BFS	16,594
BIS	6,455

4.2b - Reciprocal Borrowing …e SWAN

Charging Library	Number of Checkouts
ADS	915
AMS	15,960
BBD	1
BCS	299
BDD	3,478
BFS	1,345
BIS	2,445

This method of data presentation gives consistent reporting counts, as well as enables libraries to compare against peer institutions.

Movement toward open report templates

Instead of developing multiple versions of similar reports, SWAN is moving in the direction of providing more open templates which pull additional data elements. Libraries can then filter, page, and arrange this data to meet their more specific needs.

INDEX ✕

☑ Summary of your selections

1 Item Category1
2 Item Category2
3 Item Category3
4 Item Status
5 Item Type
6 Item Collection
7 Item Created Start Date
8 Item Created End Date
9 Item Last Activity Start Date
10 Item Last Activity End Date
11 Item Last Checkout Start Date
12 Item Last Checkout End Date
13 Item Library Desc

1. Item Category1

Choose elements of Item Category1

Search for: ☑ Match case

Available:
◇ ART_PIC
◇ AUDIO
◇ BOOK
◇ CONS_GAME
◇ DIGITALRES
◇ EQUIPMENT
◇ KIT
◇ LARGETYPE

1 - 18 of 18

Selected:
(none)

2. Item Category2

Choose elements of Item Category2

Search for: ☑ Match case

Available:
◇ ADULT
◇ JUVENILE
◇ POLICY NOT FOUND
◇ TEEN
◇ UNKNOWN

Selected:
(none)

REPORT HOME ▾ | TOOLS ▾ | DATA ▾ | GRID | FORMAT ▾ | Last update: 4/29/19 1:41:51 PM

RELATED REPORTS ? ✕

▦ **Count/List Items Report**
▦ Item Circ Report

REPORT DETAILS ? ✕

Report Filter:
({Item Last Checkout Date} (ID) >= 4/1/2019) And ({Item Last Checkout Date} (ID) <= 4/30/2019)

View Filter:
{Item Category2} = JUVENILE

VIEW FILTER   ⊤ Add Condition   ✕ Clear All   ☑ Auto-Apply changes   ? ✕

ⓧ **Item Category2** In List (JUVENILE)

PAGE-BY: Item Library Desc: Messenger Public Library of North Aurora ▾   ? ✕

Data rows: 41 | Data columns: 1

Item Collection △	Item Category2 △	Item Category1 △	Number of Items ▽
AV_JUV	JUVENILE	AUDIO	75
AV_JUV	JUVENILE	VIDEO	883
BIOGRAPHYJ	JUVENILE	BOOK	100
BLUESTEM	JUVENILE	AUDIO	2
BLUESTEM	JUVENILE	BOOK	23
BOARDBOOKS	JUVENILE	BOOK	481
BOOKBAGS	JUVENILE	KIT	13
CAUDILL	JUVENILE	AUDIO	6
CAUDILL	JUVENILE	BOOK	14
DISPLAY_J	JUVENILE	VIDEO	35
FAVORITES	JUVENILE	BOOK	498

📄 REPORT OBJECTS
▤ NOTES
▥ RELATED REPORTS

PARENTING	JUVENILE	VIDEO	1
PICTUREBK	JUVENILE	AUDIO	6
PICTUREBK	JUVENILE	BOOK	849
READERS	JUVENILE	AUDIO	6
READERS	JUVENILE	BOOK	631
SERIES_J	JUVENILE	AUDIO	8
SERIES_J	JUVENILE	BOOK	149
SPANISH_J	JUVENILE	BOOK	88
YOUTHSERV	JUVENILE	KIT	2
Total			**6,627**

Development in underway for a monthly dossier and data templates. Grant Halter, SWAN Data Analyst will join our Clarity Task Force in June to review this work.

Questions for Clarity Task Force:

1. Can our consortium identify and agree on a standard set of given reports?
2. If this seems feasible, where do we begin and who needs to be at the table?

3. Inconsistent policies lead to inconsistent reporting of data – are libraries able to understand the implications of their policy decisions on statistics?
4. What approach is best for teaching these skills? Do we need standard reports/direct delivery for the majority and the ability to query and manipulate data returned for a select group of analysts?
5. What support is needed to help move into providing data that is actionable rather than merely historic in terms of reporting?

SWAN Membership Groups

SWAN has an active and growing number of advisory and user groups within the membership. Approximately 60 meetings are held annually across the membership. This year's meetings and events can be accessed on L2 - https://www.librarylearning.info/tags/?SWAN2019
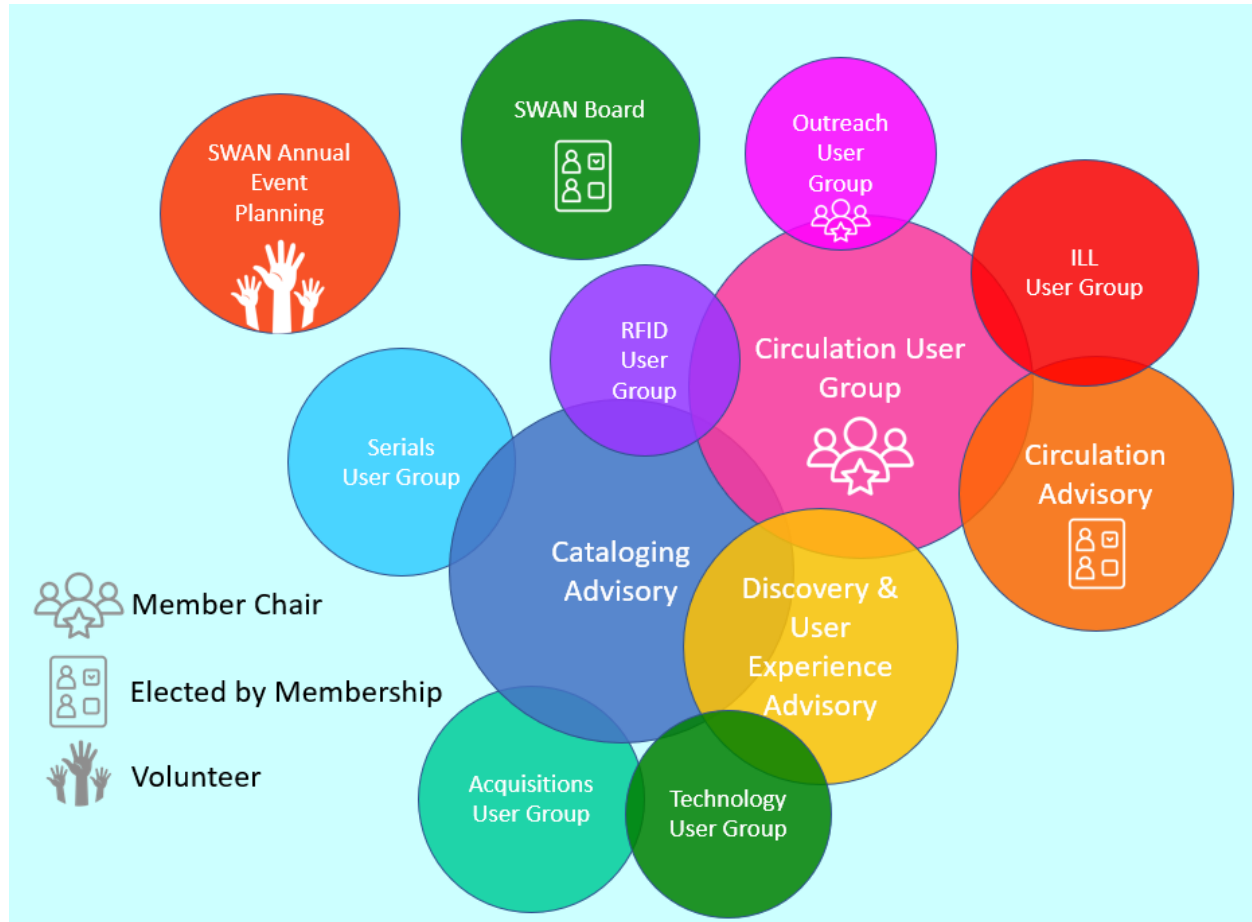
Discussion Questions:

1. What is the most effective method for networking within our consortium?
2. What groups are working? Which are not?
3. How can we most effectively coordinate the work of these groups so that priorities are addressed across functional groups?
4. Which topics are not represented and how can they be incorporated?
5. This past year we have successfully transitioned two groups to leadership from members. How can we expand this member-driven leadership?
6. Should advisory groups be elected, selected, or volunteer-based?
7. Where should meetings be held? We would like to hold these within member libraries, but attendance falls when hosted outside of central location (RAILS, Oak Brook)
8. List one topic/area that can be shared across multiple groups, developing a shared solution in FY20 (July 1, 2019-June 30, 2020)

User Groups

Agendas and documents for all SWAN meetings are available in Meetings & Documents.
To assure we have room capacity at all SWAN meetings and events, we ask that you register in advance.

Acquisitions User Group

Open to all library staff who currently use Acquisitions and for those interested. This is an excellent opportunity to network, so come join us for all things Acquisitions.

2019 Meeting Dates: May 9, Oct. 10

Cataloging Advisory Group

Open to those who want to have a more active role in shaping the catalog. This group discusses and makes necessary changes to SWAN's cataloging standards and procedures.

2019 Meeting Dates: Mar 14, May 9, Aug. 22, Nov. 14

Circulation Advisory Group

This group consists of 11 members elected for two-year terms on a rotating basis. Topics include circulation policy, best practices, and software/enhancements. All library staff are welcome to attend.

Representatives

- Sue Feddersen, Bensenville Community Public Library District [11/2019]
- Cindy Maiello Gluecklich, Melrose Park Public Library [11/2019]
- Sandra Leyva, Alsip-Merrionette Park Public Library District [11/2019]
- Julie Lombardo, Woodridge Public Library [11/2019]
- Victoria Muraiti, River Forest Public Library [11/2019]
- Cheryl Pawlak, Downers Grove Public Library [11/2020]
- Debbie Sheehan, Indian Prairie Public Library District [11/2019]
- Brittany Smith, Westmont Public Library [11/2020]
- Peggy Tomzik, Eisenhower Public Library District [11/2019]
- Thomas Webb, Matteson Area Public Library District [11/2020]

- Stephanie DeYoung, Batavia Public Library District [11/2020]

2019 Meeting Dates: Jan. 16, Mar. 20, May 15, July 17, Sept. 18, Nov. 20

Circulation User Group

Open to all Circulation Managers. This is a wonderful opportunity to network and trade circulation-related tips and tricks. Discussion topics include new policies and best practices.

2019 Meeting Dates: Feb. 20, Apr. 17, June 19, Oct. 16, Dec. 18

Discovery & User Experience Advisory Group (DUX)

Open to all library staff. This group participates in research, testing, and development of User Discovery platforms & tools. Topics include Enterprise configuration, eResource Central, mobile device searching, and EBSCO Discovery Service.

2019 Meeting Dates: Jan. 24, Feb. 28, Mar. 28, Apr. 25, May 23, June 27, July 25, Aug. 22, Sept. 26, Oct. 24, Nov. 21

ILL User Group

Open to those who want to discuss and learn more about Interlibrary Loan. Join us to review Interlibrary Loan processes, procedures, and best practice.

2019 Meeting Dates: Feb. 13, June 12, Oct. 9

Outreach User Group

Open to all library staff. A great opportunity to network with colleagues about Outreach. Topics include outreach activities and best practices when using Symphony WorkFlows Outreach.

2019 Meeting Dates: Jan. 25, Apr. 26, July 26, Nov. 15

RFID User Group

We encourage a representative from each RFID library to join. This group brings together RFID libraries so they can share information and experiences. The focus is the standardization of RFID data models and procedures.

2019 Meeting Dates: Apr. 25, Oct. 24

Serials User Group

Open to all library staff who currently use Serials and for those interested. It is a forum for all things

Serials and an excellent opportunity for networking.

2019 Meeting Dates: June 13, Nov. 14

SWAN Annual Event Planning Group

If you've ever helped plan a conference, or would like to gain experience, we welcome you to join. This group meets in the months leading up to our annual user event SWANx. You'll help plan the day's events, learning sessions, keynote speaker, and theme.

2019 Meeting Dates: Feb. 26, Mar. 20

Technology User Group

We encourage all library IT staff and contractors to join. Topics include trends in library Information Technology and IT projects that relate to SWAN.

2019 Meeting Dates: Mar. 21, Sept. 19

Source URL (modified on 03/04/2019 - 17:50): https://support.swanlibraries.net/node/63717