SWAN ADMINISTRATORS' & DIRECTORS' QUARTERLY MEETING

Oak Brook Public Library
600 Oak Brook Road
Oak Brook, IL 60523

September 5, 2019
10:00 A.M.

SWAN Administrators' & Directors' Quarterly Meeting

September 5, 2019
10:00 a.m. – 12:00 p.m.
Oak Brook Public Library, 600 Oak Brook Road, Oak Brook, IL 60523
Meeting Room
Please join the meeting from your computer, tablet or smartphone
https://global.gotomeeting.com/join/963473653

Agenda

1. Call to Order and Welcome
2. Public Comment
3. Introduction of New Library Directors
4. Action Item-- Approval of the June 5, 2019 Quarterly Meeting Minutes (pgs. 3-7)
5. Discussion Item – SWAN Demand Management: Configuration Changes to Holds & Testing Underway (pgs. 8-10)
6. Discussion Item – Overview of the New SirsiDynix BLUEcloud Circulation, Cataloging, & Acquisitions (pgs. 11-25)
7. Discussion Item—BLUEcloud Mobile App Feedback & Questions
8. Discussion Item – SWAN Board Recommended Change in Accounting Service (pgs. 26-28)
9. Action Item – Amend the Fiscal Year 2020 Budget

   RESOLVED, THE SWAN FISCAL YEAR 2020 BUDGET LINE #5420 ACCOUNTING WILL BE INCREASED FROM $8,445 TO $21,555 FOR 10 MONTHS OF ACCOUNTING SERVICES PLUS ONE-TIME SETUP FEES.

   Library roll call performed by Dawn Bussey, SWAN Board Secretary, Director of Glen Ellyn Public Library

Article IX Section 6 Voting: The following items require membership vote to pass: Budget & Revisions (In-person affirmative vote of 2/3 of all members present is required)

10. Information Item – 2019 SWAN Expo (pgs. 57-66)
11. Announcements and Questions
12. Next meeting: December 5, 2019

Meeting Information

Member Comment after each agenda item.

The Quarterly Meeting will be live-streamed via GoToMeeting. The URL below is specific to the date of the meeting. Please join the meeting from your computer, tablet or smartphone.

https://global.gotomeeting.com/join/963473653

SWAN Administrators' Quarterly Meeting Minutes

Oak Brook Public Library
600 Oak Brook Road
Oak Brook, IL 60523
June 6, 2019 10:00 a.m.

1. **Call to Order and Welcome**
   President Bodewes called the meeting to order at 10:00 a.m. Bodewes, Verzani, Milavec, and Wittmann were present to establish a quorum

2. **Public Comment**
   No public comment

3. **Introduction of New Library Directors**
   Jane Jenkins, Green Hills Public Library
   Robin Wagner, South Holland Public Library

4. **Approval of the March 6, 2019 Quarterly Meeting Minutes**
   David Seleb (OPS) moved to approve the March 2019 Quarterly meeting minutes, seconded by Julie Milavec (DGS). Motion carried by unanimous voice vote.

5. **Information Item – 2019 SWAN Board Election Results**
   Bodewes gave Board Election results. Jane Jenkins, Robin Wagner were present. Dawn Bussey was not. Bodewes also recognized outgoing board members Rich Wolff, Doug Losey & Tiffany Verzani.

6. **Information Item – BLUEcloud Mobile App**
   Tara Wood gave an update at the meeting that the App is in the testing phase and going well. She stated they are closer to a go-live date. She gave a brief explanation on how the App will work.
   Q&A – What will it be branded in the App Store where you download it? –
   Wood answered – SWAN Libraries App, not published in the store yet, we are using a test. Promotional materials will be distributed.

7. **Information Item – Enterprise Usability Study: Article Search**
   Robin Hofstetter gave an update on Article Search Usability Testing. Recommendations are to have a pilot study with Eisenhower Public Library District as a volunteer.

8. Information Item – SWAN Strategic Plan & 2019-2010 Roadmap

Skog discussed the 6 objectives from the Strategic Plan. Skog went over the 1st objective which led to the formation of the Clarity Task Force. He explained the focus of the group is to come to a shared diagnosis on issues surrounding use of Symphony WorkFlows and Enterprise. We will get more feedback for a more accurate diagnosis. Based on what was shared, Skog wanted to know are we on the right track?

Q&A – Can the membership offer more input.

Tortorella commented that we hope to collect information from several sources including Town Hall meetings where initial findings can be shared and explored further.
Milavec – At the Board level I will make sure our process allows that.

Skog noted that the during this next fiscal year July 1 , 2019 through June 30, 2020 we will have a membership freeze. Skog indicated the libraries that are interested in SWAN. Part of the plan for adding libraries includes migration activities every other year which will contain need to allocate SWAN staff continuously for migration work.

There were comments applauding the pause/freeze for new libraries but also adding new libraries does affect existing libraries as well. We want to be doing the best practices for all involved.

Skog gave an update on the annual Summer SWAN Expo conference with planning underway. The event will be August 16th at Moraine Valley Community College.

Tortorella discussed ILS audit. Look at reports, how they are run. We would like to do that audit for all libraries

Tortorella gave an update on the dissatisfactions around the ILS, pinpointing inefficiencies in Symphony WorkFlows. BLUEcloud staff client is becoming a viable product in some work situations. We can provide feedback to SirsiDynix through involvement in their Strategic Partner Program and Pilot studies. They seek input from SWAN. We need to be involved in the product development to impact functionality that is important to our membership. La Grange & St. Charles are working with us in the BLUEcloud Acquisitions Phase III Pilot.

Skog discussed automated transit and delivery labels. Green Hills implemented the In Transit label upon go live and it is going very well. Skog showed on the SWAN website how the transit label system works. We have about 15 libraries using the system now.

Skog discussed SWAN Community Forums, which is in the very early stages. The topics are being discussed and we will continue to have other libraries participate in the discussions. The initial group of members participating is a group of cataloging staff collaborating with SWAN Bibliographic Services on cataloging standards.

Skog mentioned we are adding new documentation and expanding existing on our support site and encouraged members to take a look at the site.

OCLC Holdings Process – Scott Brandwein
We are working with a vendor called The MARC of Quality (TMQ) to maintain OCLC holdings on behalf of the entire consortium. One year from now they are retiring so we are meeting to put together a product to replicate this product.

Skog discussed the 501 c (3) option. SWAN is at the early stages with the Board Members, draft ideas, getting legal opinions. More discussion will follow at the July Board Meeting.

Q&A What is any is your timeline for completing this and what if any are the roadblocks:
Skog commented that SWAN would have to create new bylaws, a new membership agreement as this would entail moving away from an intergovernmental agreement. The 501c3 option would set the stage for fundraising, getting donations, and providing more avenues for participation. One of the first things we have discussed with the lawyers is what is the definition of "a public body". We are only in the initial stages.

Skog commented that we are in the final 5-year agreement with SyrsiDynix and plans to extend that agreement are underway.

Skog discussed briefly the net promoter score and how that will be used in future member surveying. It helps us gage how we are doing as a consortium.

Skog reviewed additional projects as outlined within the operational plan supporting the Strategic Plan.

9. BLUEcloud Analytics Dossiers

Tortorella discussed the objective of providing numbers that can tell a story.

Q&A – Are you running the reports for both sets of fiscal years January-Dec & July-June.

Yes, they are different dates on your fiscal year.

Is the report online?
Yes, in BLUEcloud Analytics, look at SWAN reports > IPLAR > ILLINET Traffic Survey

Templates will be available in the next week or so.

10. Cataloging Library Overview & Eisenhower Welcome – Scott Brandwein

Brandwein mentioned Eisenhower Public Library joined earlier this year as a cataloging library. Brandwein discussed the application requirements & application process for becoming a cataloging library.

11. Information Item – Book Clubs:
A Holistic View – Scott Brandwein & Crystal Vela

Vela discussed Book clubs and what effect is has on libraries. Vela gave an example and how we will change to a standardized practice.

Q&A Will you be discussing the Library of Things?

Yes, it is on our radar.

Explain the High Demand Holds on page 25 in the packet
Tortorella indicated we have asked five libraries to test high demands holds and we have gotten very minimal feedback. We know this is due to the complexity and difficulty of running and analyzing this data. It is on our list to complete documentation, so we can roll out to everyone.

Vela recommends you run weekly report on holds that cannot be filled and contact those patrons, while determining what is best for your library and patrons in terms of filling those requests.

Q&A- How does a library become a pilot library?
Tortorella responded this question is a good one. SWAN staff work closely with our members and we are able to identify members who will have a strong voice and expertise in an area and/or benefit from the experience, while keeping the consortium perspective in mind.

Announcements:
Ted Bodewes stated Thomas Ford Memorial Library renovations are done.

La Grange Park Public Library renovations are done.

Tiffany Verzani -Elmwood Park stated her library main lobby is done.

Kelley Nichols from Chicago Heights spoke and let the members know she has now taken over as Library Director since there has not been one in 5-7 years. Tony Preckwinkle would

like to do a show time at all Cook County libraries - she will be contacting Dee Brennan at RAILS.

Next meeting: September 5, 2019 at Oak Brook Public Library

Adjournment: 11:41 a.m.

Minutes Prepared by Ginny Blake

Respectfully Submitted,

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SWAN Holds Management Evaluation

Date: August 29, 2019

July-October 2019 – Timeline for initial evaluation and impact of global changes

Statement of Issue

Holds fulfillment management within a large consortium is challenging. The goal is to get the requested title into the hands of the patron as quickly as possible. This requires balancing two potentially conflicting configuration settings: allowing dynamic holds (first available copy triggered) vs filling the hold with an on-shelf item at the pick-up library.

Evaluation Team

Members:

- Christine Sporleder, Bloomingdale Public Library
- Bonni Ellis, St. Charles Public Library District
- Michelle Kurczak & Mary Malach, Messenger Public Library of North Aurora
- Julie Lombardo, Woodridge Public Library
- Cheryl Pawlak, Downers Grove Public Library
- Christine Sporleder, Bloomingdale Public Library

SWAN Staff (primary consultants, others will be included too):

- Dawne Tortorella
- Crystal Vela
- Samantha Dietel
- Vickie Totton

Current Global Configuration

Success in the SWAN holds configuration environment is very dependent on internal procedures. Libraries which include opening and closing procedures to check available holds, as well as periodically throughout the day checking the dynamic *Onshelf Items wizard* within Symphony WorkFlows are able to fill holds with local items at a higher level.

This practice of allowing dynamic database updating differs from some consortia, including past practice of N19 consortia, that did not enable dynamic holds. In SWAN, the Onshelf Items wizard dynamically updates during the day, based on newly available items.

Member Library Practice

SWAN runs the *List onshelf Items with Holds Report* (pullonshelfhld) daily at 7:30 AM. This list creates a pull list containing a list of items that are qualified to satisfy a hold and can be picked up somewhere in the library system. This list updates the items listed in the *Onshelf Items wizard*.

Library staffing patterns and holds processing within SWAN tend to fall within the workflows, or a combination:

1. Set time when Onshelf Items wizard is reviewed, typically once or twice a day
2. Continuously check Onshelf Items throughout the day
3. Staffing determines when/if pulling items to fill holds is possible on any particular day

Proposed Changes

See the *Hold Configuration Options Analysis 2019-07-26.pdf* document.

9.	SWAN	RSA	Other	Test Case
System is configured to NOT trap hold with first item received	x			
System is configured to trap hold with first item received		x	x	X – target

Test Change #1 – Scheduled for 9/10/19: This configuration change is recommended as a first step in testing configuration options. Through consultation with other consortia and SirsiDynix, this is the most likely setting to positively impact "time to patron's hands" – getting the item to the patron as quickly as possible. It may also result in items being transited (from Library A to Library B for hold, Library B checks in – and it immediately is transited back to Library A because Library B filled the hold locally while item was in transit). This will impact some procedure practice and require communication, but impact is positive for patron experience.

To begin the process of configuration changes and analysis, the following timeline is proposed:

July 25-August 31:

Run a daily report to calculate mean and median of holds filled that day. This report will be compiled to determine of titles filled on a daily basis, what is the average of median of time to fill. The monthly composite will also be calculated. The following examples show the extreme cases of time to fill from 7/24/19, as well as the average and median days to fill.

On July 24, 2019:

5,896 holds filled
Average days to fill: 9.97
Median days to fill: 6

1	Title	Hold Placed	Hold Filled	Days	Median
2	Guinea pigs / Anita Ganeri	20190724	20190724	0	
3	Teen mom 2. Season 1 [videorecording]	20190724	20190724	0	
4	Woodrose mountain / RaeAnne Thayne	20190724	20190724	0	
5	Sweet Laurel Falls / RaeAnne Thayne	20190724	20190724	0	
6	Best of Bond-- James Bond [sound recording] : 50th anniversary collection	20190724	20190724	0	
7	Dad is fat [sound recording] / Jim Gaffigan	20190724	20190724	0	
8	Willowleaf Lane / RaeAnne Thayne	20190724	20190724	0	
9	Console wars : Sega, Nintendo, and the battle that defined a generation / Blake J. Harris ; for	20190724	20190724	0	
10	Bad love : an Alex Delaware novel / Jonathan Kellerman	20190724	20190724	0	
11	Veronica Mars [videorecording] / Warner Bros. Digital presents ; a Spondoolie production ; s	20190724	20190724	0	

…

1	Title	Hold Placed	Hold Filled	Days	Median
5888	Girl, wash your face : stop believing the lies about who you are so you can become who you	20190207	20190724	167	
5889	Sophia princess among beasts / James Patterson with Emily Raymond	20190205	20190724	187.2	
5890	Gunsmithing - Rifles	20190205	20190724	169	
5891	Why they can't write : killing the five-paragraph essay and other necessities / John Warner	20190204	20190724	170	
5892	Educated [book club bag] : a memoir / Tara Westover	20190124	20190724	181	
5893	Letting go : the pathway of surrender / David R. Hawkins, M.D., Ph.D	20190117	20190724	188	
5894	Mini habits : smaller habits, bigger results / by Stephen Guise	20181027	20190724	270	
5895	Mission: Impossible : the 5 movie collection	20180921	20190724	306	
5896	Incredibles 2 / Disney presents a Pixar Animation Studios film ; written & directed by Brad Bi	20180814	20190724	344	
5897			5896	9.974780893	6

August 16, 2019:

Present plan and discussion at SWANx. After SWANx, documentation and communication will go out to the membership attempting to simplify this complex puzzle as much as possible. We need to communicate “what does this mean for me” and how it may impact checkout and processing of transited items.

September 10, 2019:

Implement changes to global configuration settings as outlined. This must be scheduled and completed by SirsiDynix.

September 2019:

Continue data analysis to determine if any change in average and median days to fill is seen.

October 1-15, 2019:

Assess additional recommendations

What is BLUEcloud?

SWAN Quarterly Meeting, Sept 5, 2019

Aaron Skog, SWAN
Dawne Tortorella, SWAN
Tara Wood, SWAN

1

What is BLUEcloud?

What is a Library Services Platform?

Aaron Skog, SWAN Executive Director

What is Symphony? What is BLUEcloud?

Symphony

- Integrated Library System (ILS)
- Application, Oracle database
- Staff interface is WorkFlows
  - Searching, Circulation, Cataloging, Acquisitions, Managing Holds, User Management
  - Java based client
- Can be sited locally or hosted by SirsiDynix Software-as-a-Service (SaaS)

BLUEcloud

- Library Services Platform (LSP)
- Can work with either Symphony ILS or Horizon ILS, but does not replace either ILS
- BLUEcloud Central allows managing and launching applications through a user-specific login
  - BLUEcloud Circulation, Cataloging, Acquisitions
- Sited in geographical regions
- Accessed through web-browser

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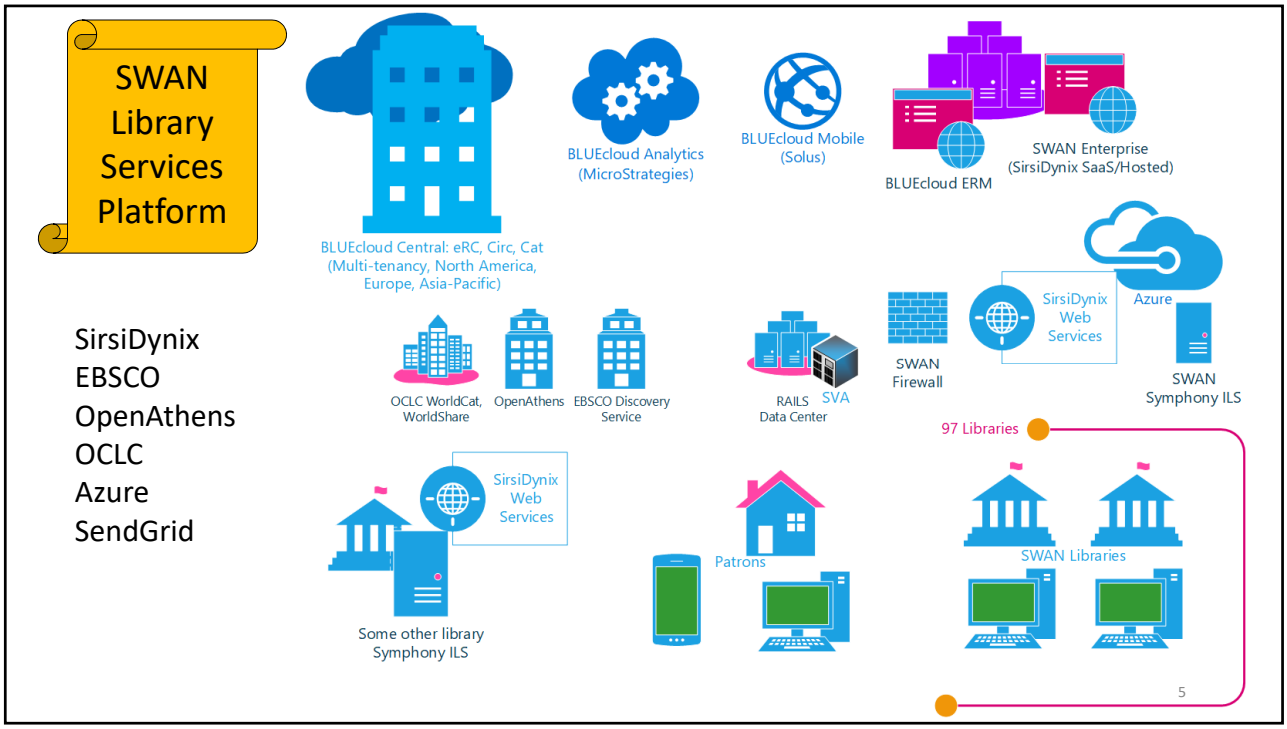

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BLUEcloud Regions & Upgrades

- Multi-tenancy: global, data centers in different continents
- Users in a region access nearest data center
- Shift access should failure occur
- Version naming: 19.06.0 = June 2019
- "Agile" Software Development
- BLUEcloud Global regions
  - North America (three regions):NA1, NA2, NA3
  - Europe: EMEA
  - Asia-Pacific: APAC
- SWAN is NA2

The projected schedule for upgrades in each region is as follows:

BLUEcloud Environment URL	Upgrade Date and Start Time
https://na2.bc.sirsidynix.net	23 July, 2019 10:00 PM MDT
https://na3.bc.sirsidynix.net	23 July, 2019 10:00 PM MDT
https://sg1.bc.sirsidynix.sg	23 July, 2019 11:00 PM SGT
https://emea1.bc.sirsidynix.net.uk	23 July, 2019 11:00 PM BST
https://apac1.bc.sirsidynix.net.au	24 July, 2019 1:00 AM AEST
https://na1.bc.sirsidynix.net	25 July, 2019 10:00 PM MDT
https://can1.bc.sirsidynix.net	25 July, 2019 10:00 PM MDT

BLUEcloud: Now

What is SWAN already using?

Aaron Skog, SWAN Executive Director

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What does BLUEcloud do for us and our patrons?

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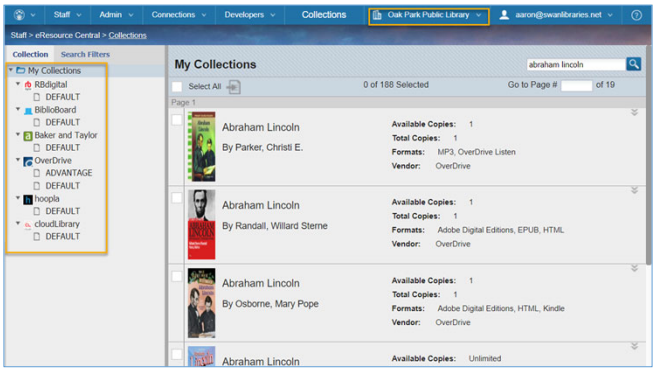
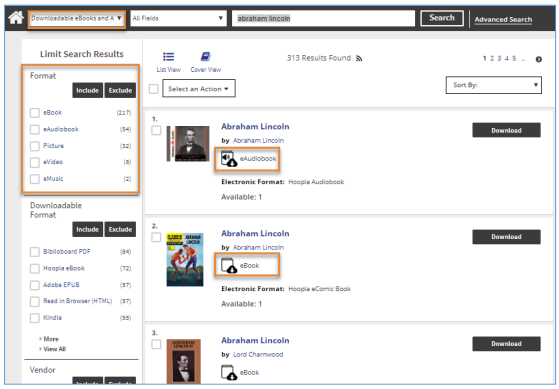
E-Content Integration with Enterprise

eResources subscriptions are managed in BLUEcloud Central

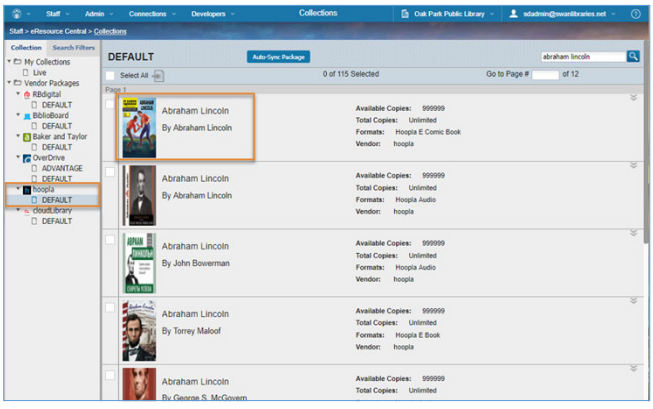


Enabling access to eResources in Enterprise

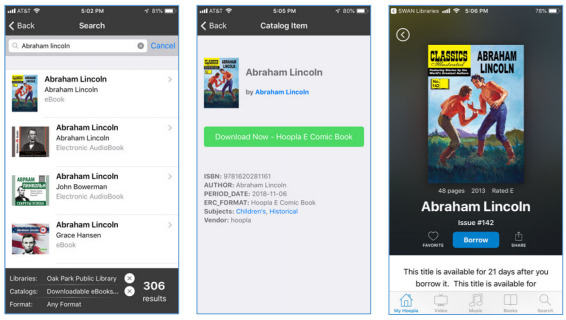


E-Content Integration with and BLUEcloud Mobile

eResources subscriptions are managed in BLUEcloud Central

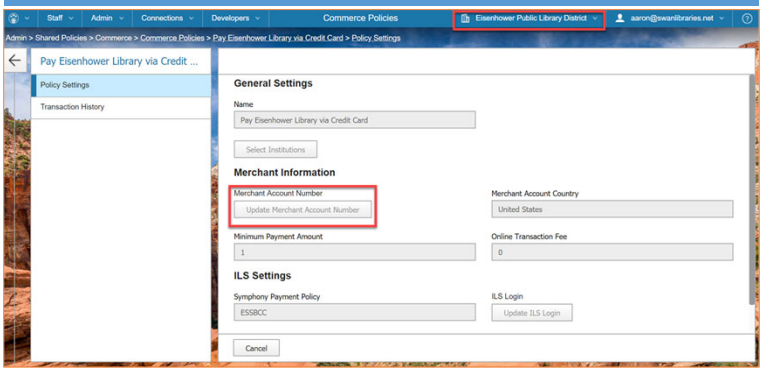


Enabling access to eResources in BLUEcloud Mobile

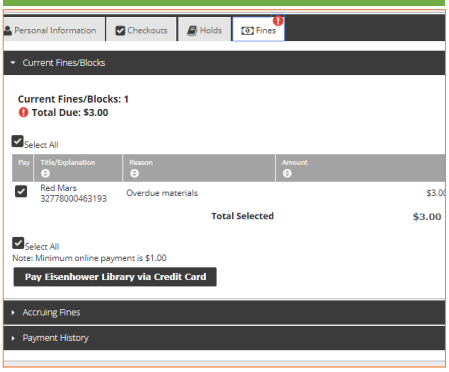


BLUEcloud Commerce

BLUEcloud Central used to configure Commerce Policies



Patrons can pay fines online

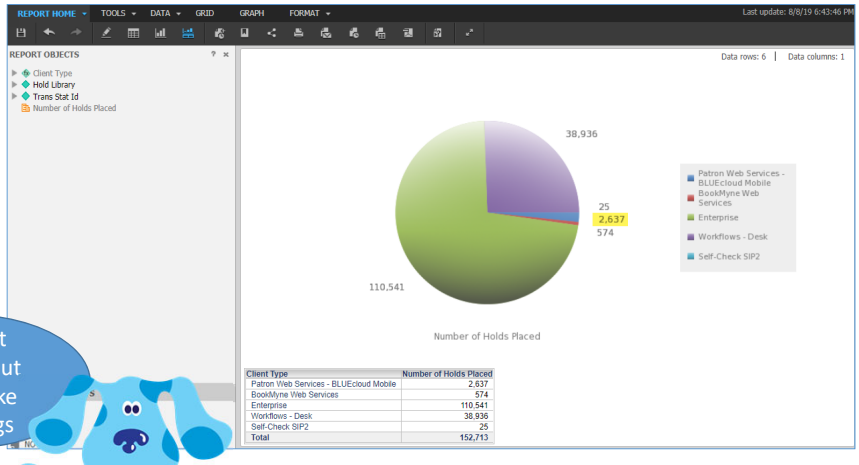


BLUEcloud Analytics, formerly known as BCA

BLUEcloud Analytics can report on transactions within BLUEcloud applications.

From 7/16-8/7:

2.3% of patron-initial holds came through BLUEcloud Mobile.



BLUEcloud: Research & Development in SWAN

Dawne Tortorella, SWAN Assistant Director
Tara Wood, SWAN User Experience Manager

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What is research & development?

From the *Oxford English Dictionary:*

n. Work directed towards the innovation, introduction, and improvement of products and processes.

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What are SirsiDynix SPP, Beta, and Pilots?

SPP: Strategic Partnership Program

Exists to create customer participation in new feature discussions, user centered design and product direction

Providing feedback on features earlier in development cycle while there is still time to incorporate feedback into product

Beta Testing

Customer Testing of Newly Developed Software releases prior to General Release

An opportunity to seek firsthand customer input

An opportunity to find unanticipated issues

Pilot: Projects

Pilot programs are offered when SirsiDynix is developing brand new product offerings

Similar to beta testing, but distinction is that product has not been in live release previously

An opportunity to test early development and provide feedback, iterative testing process

See SirsiDynix article: https://support.sirsidynix.com/article/40

15

BLUEcloud Central: SWAN Research Teams

BLUEcloud Circulation

- Crystal Vela, SWAN
- Tara Wood, SWAN
- Ridgeway Burns, HDS
- Bonni Ellis, SCD
- Peggy Tomzik, ESS

BLUEcloud Cataloging

- Scott Brandwein, SWAN
- Samantha Dietel, SWAN
- Diane Nickolaou, SWAN
- Claudia Nickson, SWAN
- Joy Anhalt, TPS
- Rebecca Bartlett, LGS
- Amanda Kaiser, SCD
- Julie Tegtmeier, SCD

BLUEcloud Acq Pilot

- Scott Brandwein, SWAN
- Samantha Dietel, SWAN
- Claudia Nickson, SWAN
- Vickie Totton, SWAN
- Rebecca Bartlett, LGS
- Linda Ertler, LGS
- Amanda Kaiser, SCD
- Julie Tegtmeier, SCD

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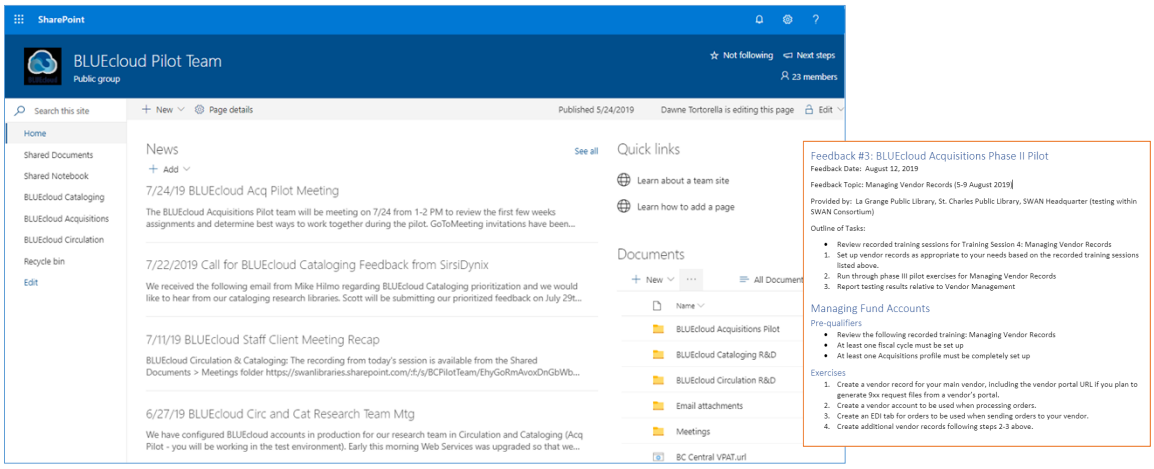
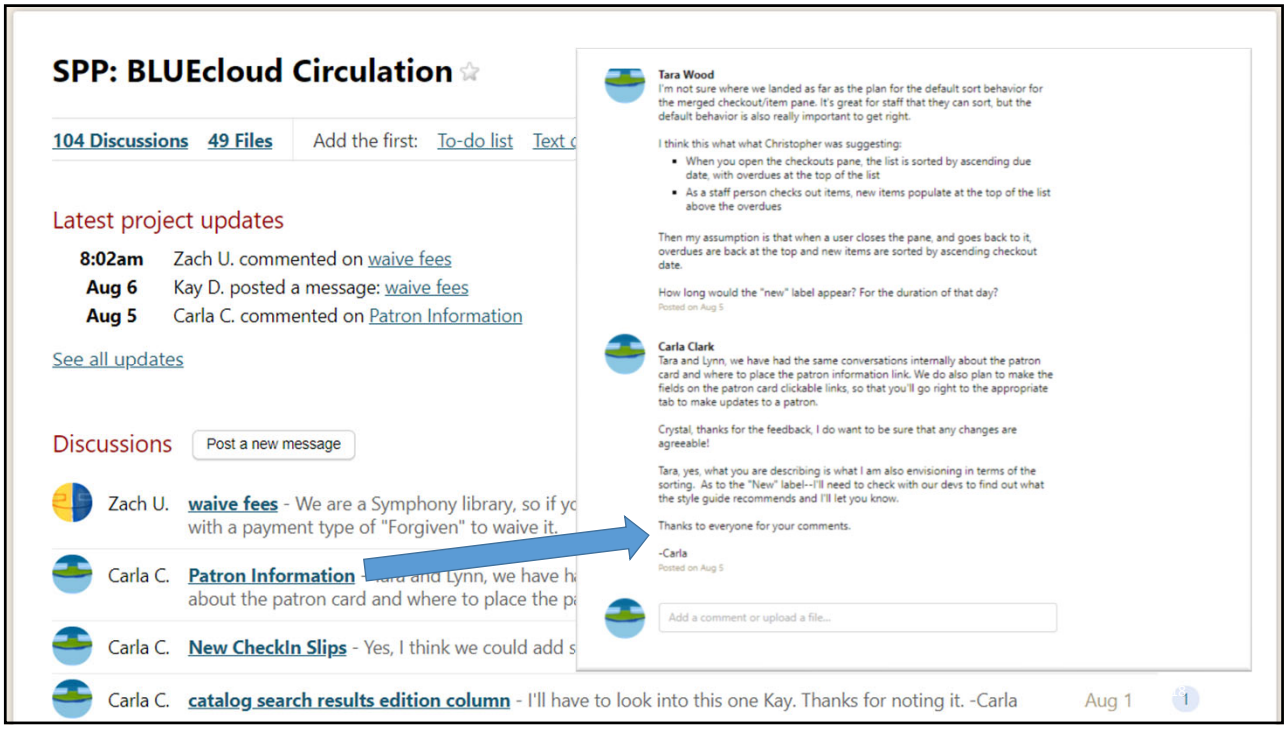
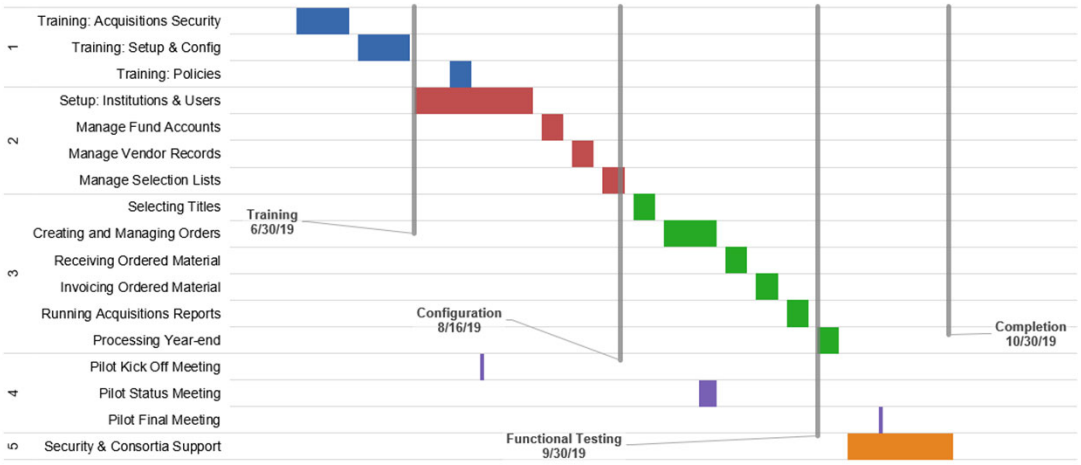
Research Teams SWAN Online Portal





BLUEcloud Acquisitions Phase III Pilot



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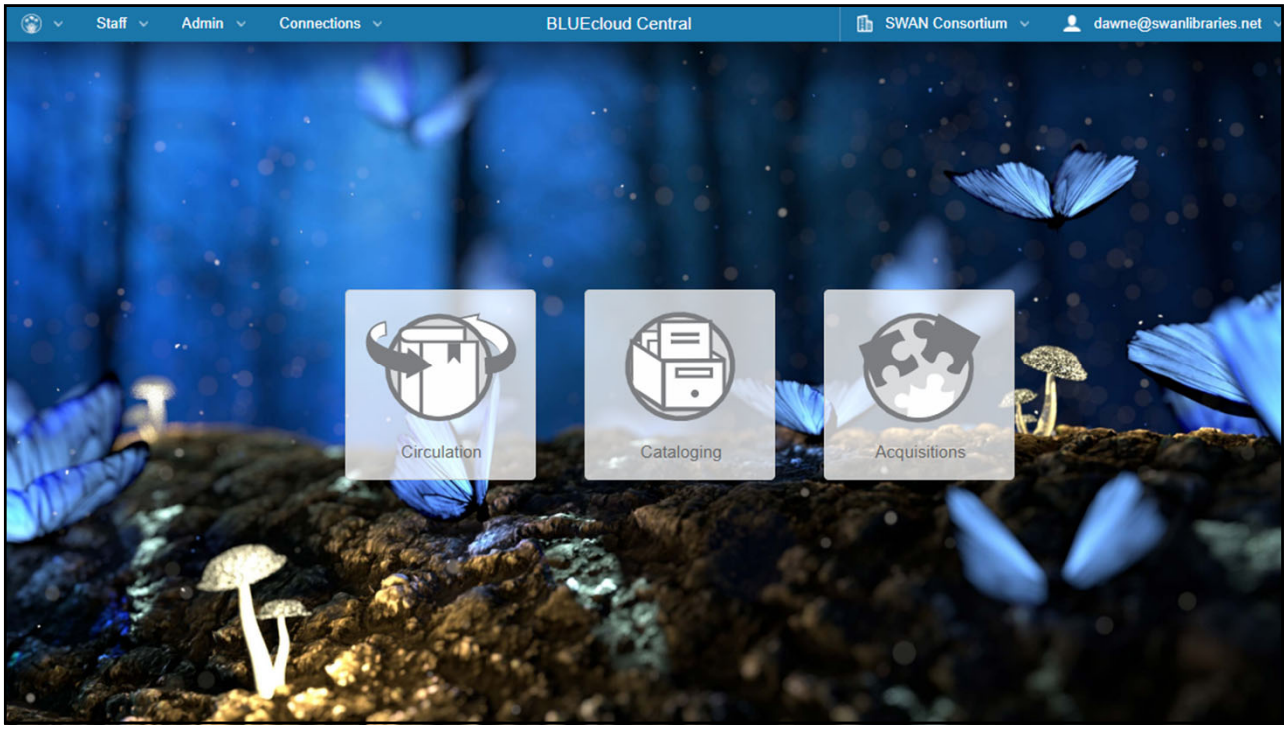
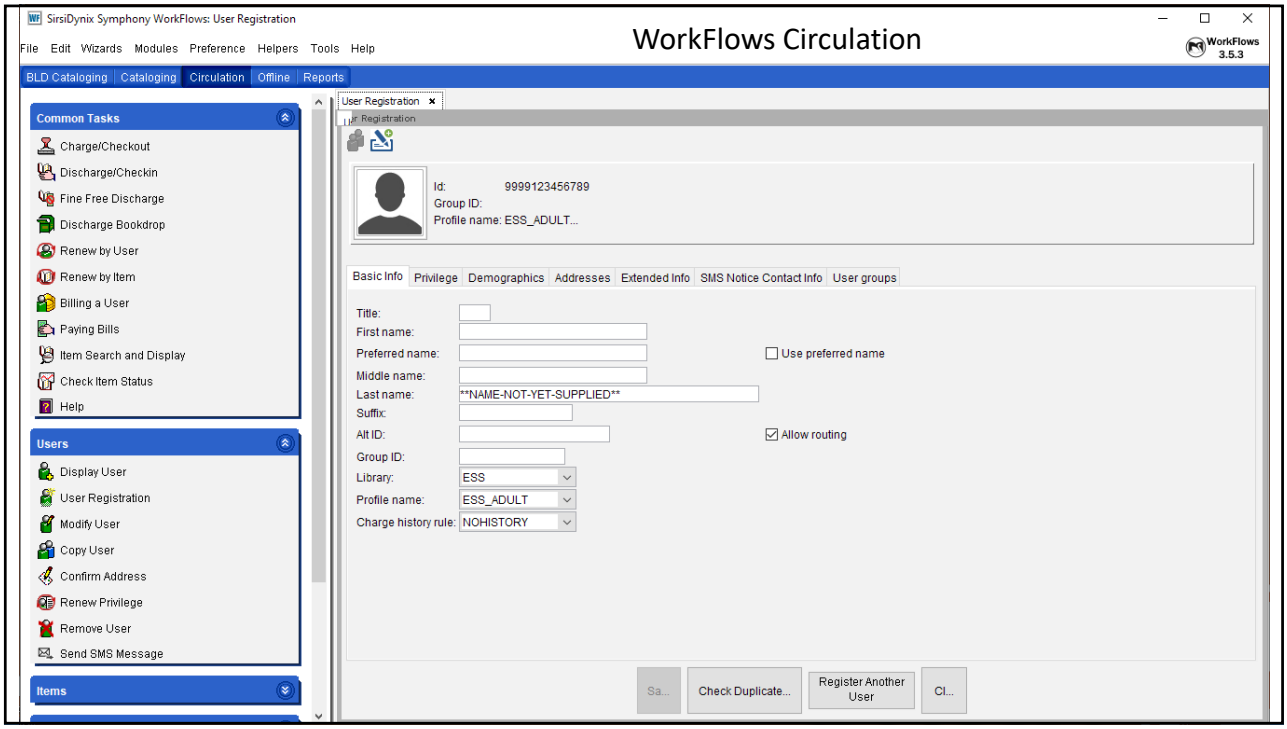
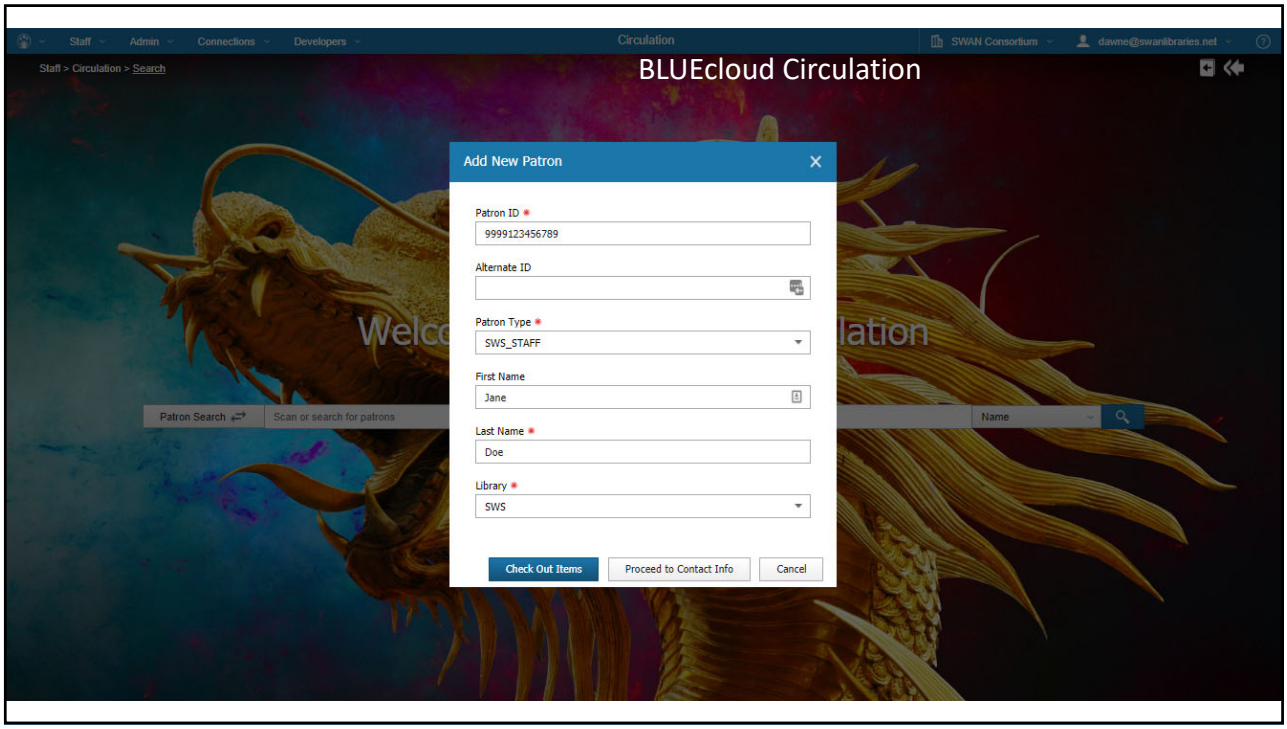
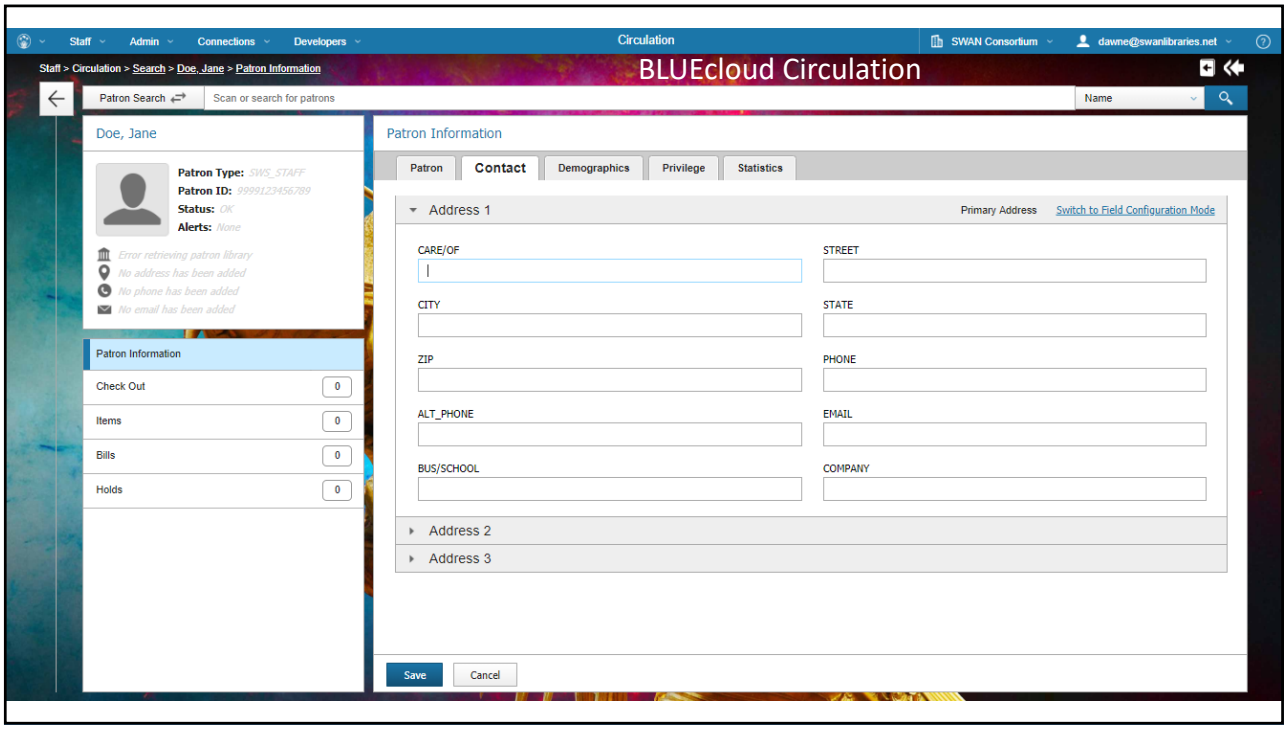
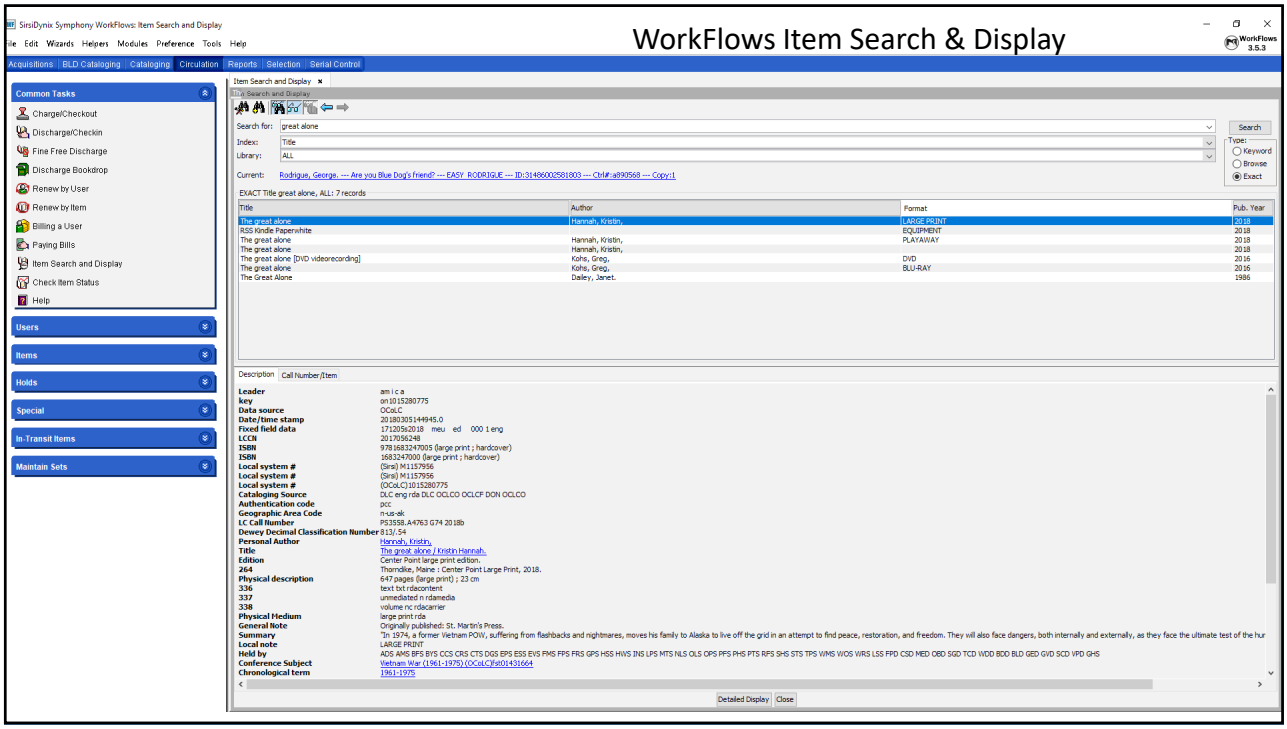


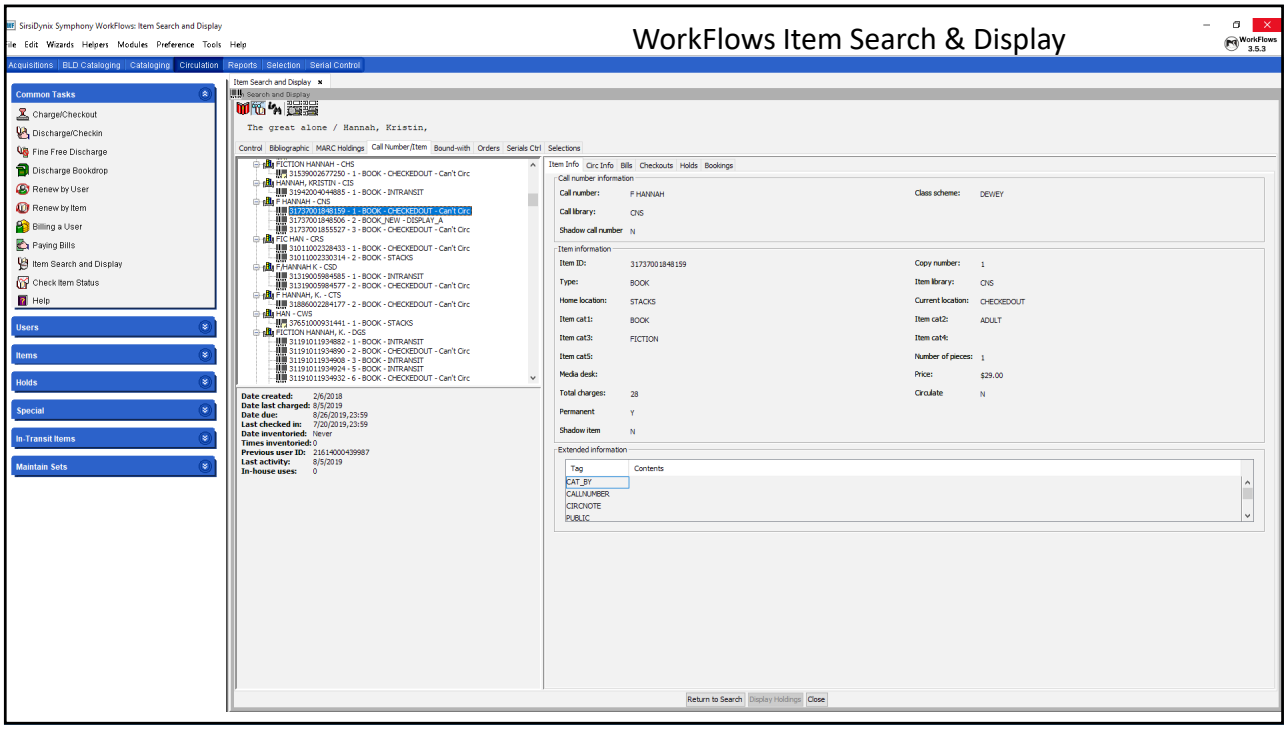

WorkFlows Circulation
SirsiDynix Symphony WorkFlows: User Registration
File Edit Wizards Modules Preference Helpers Tools Help
WorkFlows 3.5.3
BLD Cataloging Cataloging Circulation Offline Reports
Common Tasks
Charge/Checkout
Discharge/Checkin
Fine Free Discharge
Discharge Bookdrop
Renew by User
Renew by Item
Billing a User
Paying Bills
Item Search and Display
Check Item Status
Help
Users
Display User
User Registration
Modify User
Copy User
Confirm Address
Renew Privilege
Remove User
Send SMS Message
Items
User Registration
Id: 9999123456789
Group ID:
Profile name: ESS_ADULT...
Basic Info Privilege Demographics Addresses Extended Info SMS Notice Contact Info User groups
Title:
First name:
Preferred name:
Use preferred name
Middle name:
Last name: **NAME-NOT-YET-SUPPLIED**
Suffix:
Alt ID:
Allow routing
Group ID:
Library: ESS
Profile name: ESS_ADULT
Charge history rule: NOHISTORY
Check Duplicate...
Register Another User


BLUEcloud Circulation
Staff Admin Connections Developers
Circulation
SWAN Consortium
dawne@swanlibraries.net
Staff > Circulation > Search
Add New Patron
Patron ID *
9999123456789
Alternate ID
Patron Type *
SWS_STAFF
First Name
Jane
Last Name *
Doe
Library *
SWS
Check Out Items
Proceed to Contact Info
Cancel
Patron Search
Scan or search for patrons
Name

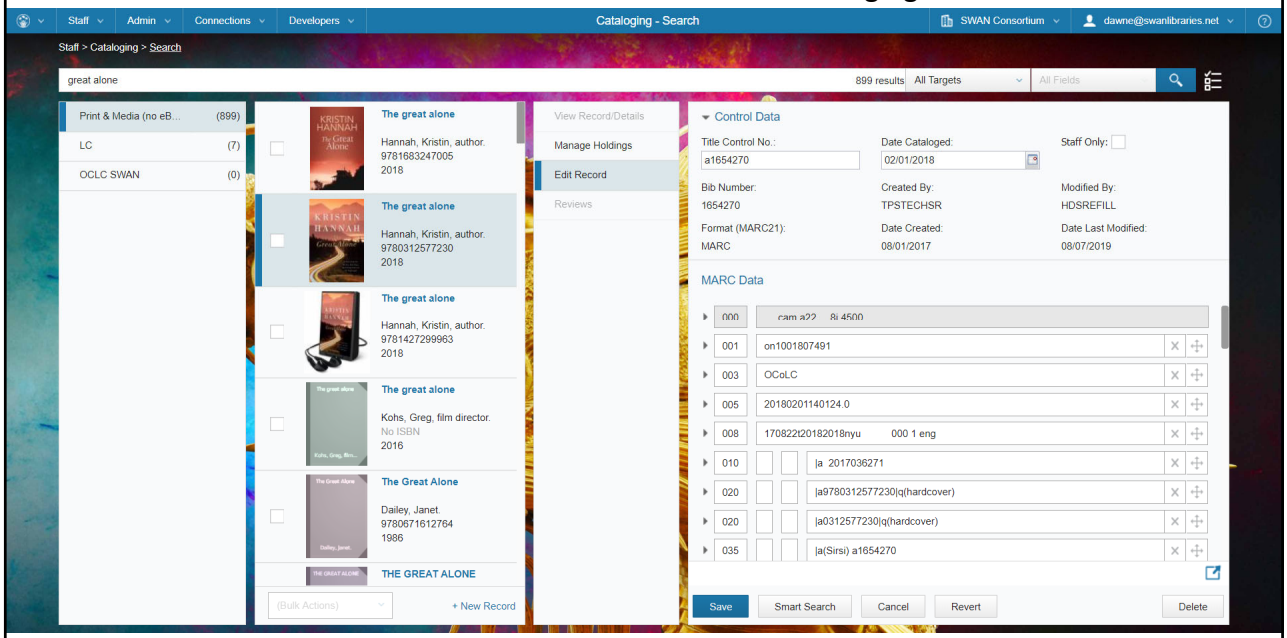

Staff
Admin
Connections
Developers
Circulation
SWAN Consortium
dawne@swanlibraries.net
Staff > Circulation > Search > Doe, Jane > Patron Information
BLUEcloud Circulation
Patron Search
Scan or search for patrons
Name
Doe, Jane
Patron Type: SWS_STAFF
Patron ID: 99991234567890
Status: OK
Alerts: None
Error retrieving patron library
No address has been added
No phone has been added
No email has been added
Patron Information
Check Out 0
Items 0
Bills 0
Holds 0
Patron Information
Patron
Contact
Demographics
Privilege
Statistics
Address 1
Primary Address
Switch to Field Configuration Mode
CARE/OF
STREET
CITY
STATE
ZIP
PHONE
ALT_PHONE
EMAIL
BUS/SCHOOL
COMPANY
Address 2
Address 3
Save
Cancel


SirsiDynix Symphony WorkFlows: Item Search and Display
WorkFlows Item Search & Display
File Edit Wizards Helpers Modules Preference Tools Help
Acquisitions BLD Cataloging Cataloging Circulation Reports Selection Serial Control
Common Tasks
Charge/Checkout
Discharge/Checkin
Fine Free Discharge
Discharge Bookdrop
Renew by User
Renew by Item
Billing a User
Paying Bills
Item Search and Display
Check Item Status
Help
Users
Items
Holds
Special
In-Transit Items
Maintain Sets
Item Search and Display
Search for: great alone
Index: Title
Library: ALL
Search
Keyword
Browse
Exact
Current: Rodrigue, George. --- Are you Blue Dog's friend? --- EASY RODRIGUE --- ID:31486002581803 --- Ctrl#:a890568 --- Copy:1
EXACT Title great alone, ALL: 7 records
Title
Author
Format
Pub. Year
The great alone
Hannah, Kristin,
LARGE PRINT
2018
RSS Kindle Paperwhite
EQUIPMENT
2018
The great alone
Hannah, Kristin,
PLAYAWAY
2018
The great alone
Hannah, Kristin,
2018
The great alone [DVD videorecording]
Kohs, Greg,
DVD
2016
The great alone
Kohs, Greg,
BLU-RAY
2016
The Great Alone
Dailey, Janet.
1986
Description
Call Number/Item
Leader
key
Data source
Date/time stamp
Fixed field data
LCCN
ISBN
ISBN
Local system #
Local system #
Local system #
Cataloging Source
Authentication code
Geographic Area Code
LC Call Number
Dewey Decimal Classification Number
Personal Author
Title
Edition
264
Physical description
336
337
338
Physical Medium
General Note
Summary
Local note
Held by
Conference Subject
Chronological term
Hannah, Kristin.
The great alone / Kristin Hannah.
Center Point large print edition.
Thorndike, Maine : Center Point Large Print, 2018.
647 pages (large print) ; 23 cm
LARGE PRINT
Vietnam War (1961-1975) (OCoLC)fst01431664
1961-1975
Detailed Display
Close

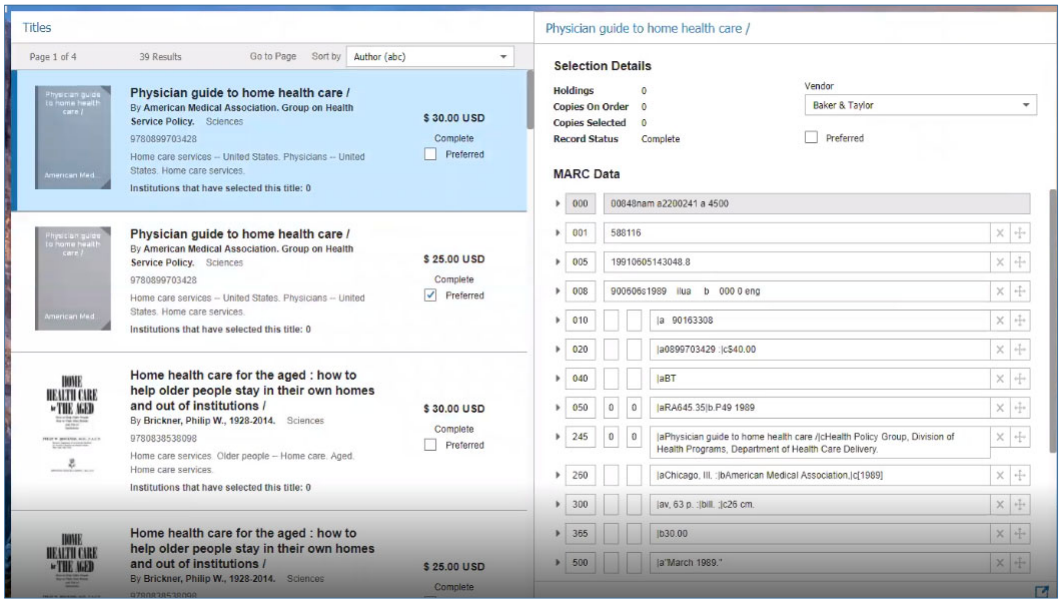
WorkFlows Item Search & Display



BLUEcloud Cataloging



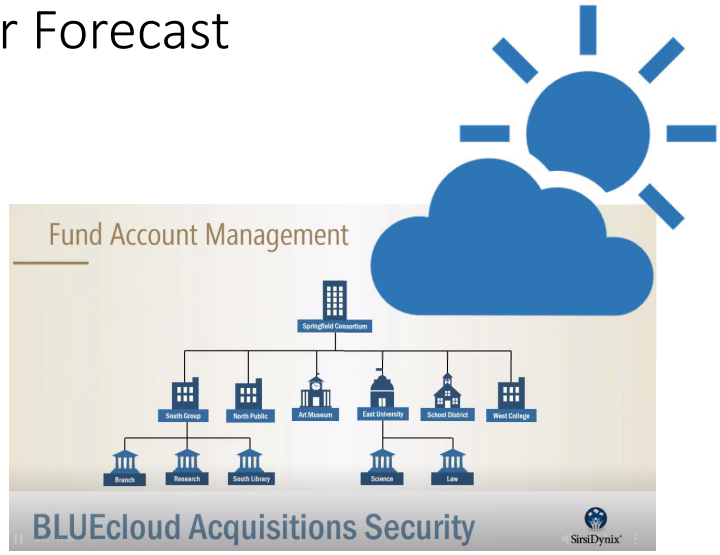
BLUEcloud Acquisitions – Selection Lists



BLUEcloud Weather Forecast

- No shared logins
- Increased need for secure policies and practice
- Shared interfaces
- Frequent updates
- Opportunities for new consortium models (e.g. shared fund circles)

Sunny but with a chance of scattered clouds



and a final note…

BLUEcloud Circulation	≠ MobileCirc ≠	BLUEcloud Mobile
• **Staff** tool running in a web browser • Runs within the BLUEcloud staff interface, BLUEcloud Central • Cloud-based application • Live and limited • *The future*	• **Staff** tool that supports a subset of staff functions • Application runs on a tablet, preferably Apple iOS • Requires a licensed installation on the device, managed by SWAN IT • Not part of the BLUEcloud suite • Used for inventory, on-shelf item processing • *Not a great Circ tool*	• **Patron** tool for searching the catalog and managing library account • Mobile app that runs in both iOS and Android operating systems • Uses search and electronic resource indexes managed in BLUEcloud central • *Available now for all SWAN patrons*

SWAN LIBRARY SERVICES EST. 1974

29

Questions?

SWAN LIBRARY SERVICES EST. 1974

Date: September 5, 2019
To: SWAN Member Library Directors & Administrators
From: Aaron Skog, Executive Director
Re: Recommendation on SWAN Accounting Service

Introduction

At the March 2019 SWAN Quarterly meeting, the question arose if SWAN was considering a change in its accounting service. The SWAN Treasurer Jamie Bukovac and I discussed this after the meeting, and we thought it would be time to conduct research and consider a change.

Knowing that the CCS library consortium was utilizing a non-RAILS provided accounting service, I arranged a visit to their offices with Ginny Blake, SWAN Office Manager, and Dawne Tortorella, SWAN Assistant Director. We met with the CCS Executive Director and Office Manager. They provided an overview of the arrangement, the accounting software used, and the service cost. After discussing this with the SWAN Treasurer, we wanted to introduce this topic to the SWAN Board.

Background

The current arrangement for SWAN accounting services is with RAILS Finance. The services provided are summarized.

- Board financial documents
- Assistance with annual audit
- Accounts payable
- Accounts receivable
- Cash management
- Bank and credit card reconciliation
- Lockbox service for deposits (a PO box with SWAN's bank)
- Maintains and stores SWAN financial records (record retention)

Under this arrangement, SWAN administration provides invoices and approvals to RAILS Finance. SWAN runs its payroll independently. There is a shared "Dropbox-like" folder used between RAILS and SWAN for generated reports, approvals, and invoices.

Benefits

SWAN would see the following benefits with a change of the accounting service.

- Better oversight: direct access to the accounting software would allow better oversight of SWAN's budget. The inability for SWAN administration to run reports and monitor activity directly in the accounting software is inefficient, and a continual source of frustration for SWAN administration and the management team.

- New chart of accounts: SWAN could create a new budget designed for its needs, rather than a chart of accounts designed for library systems. Currently, SWAN is using a chart of accounts shared by RAILS, PrairieCat, and RSA.

- Access to dedicated vendor: the use of a dedicated vendor would allow SWAN to tap into a deeper pool of accounting experience as it considers 501(c)3 status, multiple funds, donations, and fundraising.

- Independence: as noted in the legal opinion for SWAN regarding 501(c)3 status, direct ties to governmental entities such as RAILS could be interpreted that SWAN is a "public body" and would complicate its future 501(c)3 status.

SWAN has transitioned from a department of its parent library system (SLS/MLS) beginning in 2010, taking on its own employees in 2012, and moving to an independent facility in 2016. A transition of the accounting services would complete this transition to full independence for the organization.

Timeline

This timeline is preliminary and will be discussed in detail with Lauterbach & Amen once the service begins.

August 2019	ED brings recommendation for accounting service
September 2019	SWAN staff complete training with accounting service
October 2019	Complete design of new chart of accounts with board input
November 2019	Draft FY21 budget and refine new accounts with board input
January – February 2020	Migrate prior fiscal year data into accounting software
March 2020	FY21 budget is approved: includes full year of accounting service costs
April - June 2020	Run parallel accounting system against RAILS Finance system
July 2020	SWAN is live in new accounting system

SWAN Board Steps

1. SWAN Board directed Executive Director to complete an RFI for accounting services.
2. SWAN Board reviewed recommendation by Executive Director and approved the accounting service.
3. Current year SWAN budget would be amended by the membership would amend the budget at the September 2019 meeting with directors and administrators.

Executive Director Recommendation

SWAN issued a request for information letter to six accounting firms. We received three proposals from Lauterbach & Amen, Sikich, and Selden Fox. The proposals were reviewed and rated within a scoring and ranking system created prior to viewing the proposals. All three proposals were read by SWAN Assistant Director Dawne Tortorella and SWAN Office Manager Ginny Blake. After discussing the proposals with them, and following up on the references provided by Lauterbach, I recommend that SWAN move forward with Lauterbach & Amen.

Lauterbach provided answers to concerns regarding the accounting software. SWAN would utilize the Lauterbach & Amen software Accounting Creative Solutions. This system will allow SWAN to import data from the RAILS accounting system using standard .CSV files. If SWAN decided later to migrate away from Lauterbach and its Accounting Creative Solutions platform, the only current software Accounting Creative Solutions exports seamless into is QuickBooks.

Accounting Services Costs

Prior to the new LLSAP funding arrangement which began in FY20, RAILS charged $41,651 for financial services. As of this year, this is no longer deducted from the LLSAP grant amount per a change in the way RAILS calculates the LLSAP grant. The SWAN budget for accounting is for the annual financial audit.

SWAN's FY20 budget line #5420 Accounting for the 10 months of accounting service (September 2019 – June 2020) would be increased from $8,445 to $21,55 based on the Lauterbach proposal. This includes the one-time setup cost of $3,060.

SWAN Office Manager Ginny Blake is experienced in accounting software, accounts payable, and accounts receivable. After SWAN has moved this service to Lauterbach it is likely the monthly cost will be lower for the next fiscal year.

Membership Resolution to Amend FY20 Budget

The budget for FY20 would be amended for the expense. No membership fees would be increased in FY20.

RESOLVED, THE SWAN FISCAL YEAR 2020 BUDGET LINE #5420 ACCOUNTING WILL BE INCREASED FROM $8,445 TO $21,555 FOR 10 MONTHS OF ACCOUNTING SERVICES PLUS ONE-TIME SETUP FEES.

SWAN Executive Director Report

September 5, 2019 SWAN Quarterly Meeting

1 SWAN Board Officer Election

The SWAN Board officers were appointed at the July meeting.

President: Ted Bodewes, Thomas Ford Memorial Library

Vice-President: Stacy Wittmann, Eisenhower Public Library District

Treasurer: Jamie Bukovac, Indian Prairie Public Library District

Secretary: Dawn Bussey, Director, Glen Ellyn Public Library

Julie Milavec, Downers Grove Public Library

Jane Jenkins, Director, Green Hills Public Library District

Robin Wagner, Director, South Holland Public Library

2 Preliminary Analysis of FY19 Budget

The SWAN budget concluded the fiscal year 2019 (FY19) on a positive note. Total expenses were $21,841 under budget, and revenue was up $100,810. The FY19 budget was a planned deficit budget of ($70,083) but we ended up being $52,568 in the black.

Highlights from SWAN Expense Budget	FY19 Budget	FY19 Actual Budget (Preliminary)	FY19 Budget Variance	FY20 Budget
Total Salaries & Wages	$1,546,800	$1,377,832	($168,968)	$1,546,800
Total Personnel Benefits	$503,000	$463,148	($39,852)	$504,600
Total Building & Grounds	$116,720	$123,838	$7,118	$123,584
Total Travel & Registration	$30,100	$34,163	$4,063	$30,100
Subtotal Equipment and Software Maintenance Agreements	$491,683	$583,240	$91,557	$653,700
Subtotal Information Service Costs	$273,200	$276,433	$3,233	$336,200
Total SWAN Budget Expenses	$3,184,484	$3,162,643	($21,841)	$3,371,976
Total SWAN Revenue	$3,114,401	$3,215,211	$100,810	$ 3,301,526
	($70,083)	**$52,568**	**$78,969**	**($70,450)**

SWAN revenue being up $100,810 in FY19 was due to two factors: the RAILS grant funding the New 19 migration had $84,735 unbudgeted revenue to offset some FY19 OCLC expenses, and the investment income was $30,015 higher than budgeted.

SWAN salaries for the new FY20 will remain well under budget. I would encourage the SWAN member library directors to consider this during the discussion on the accounting service recommendation.

Typically, the SWAN Finance Committee will review the prior budget lines in detail as part of the work to create next year's SWAN budget. The FY19 financial audit will be completed in November and presented to the SWAN Board at that month's meeting.

3 ACCOUNTING SERVICE

At the March 2019 SWAN Quarterly meeting, the question arose if SWAN was considering a change in its accounting service. The SWAN Treasurer Jamie Bukovac and I discussed this after the meeting and we thought it would be time to conduct research and consider a change. The SWAN Board agreed to have the Executive Director request proposals from accounting firms and provide a recommendation at the August board meeting. They recommend SWAN change from the RAILS Finance department to Lauterbach & Amen. The September 5, 2019 SWAN Quarterly meeting agenda will include a discussion on this topic and a resolution to amend the current budget.

4 SWAN STRATEGIC PLAN 2019-2023

Here are updates on the plan objectives.

4.1 OBJECTIVE 1: DEVELOP A SHARED AND ACCURATE DIAGNOSIS OF MEMBER DISSATISFACTION AROUND THE EXISTING ILS AND OPAC (STAFF INTERFACE AND ONLINE CATALOG)

Guiding Principle
At this stage, the primary goals are gaining insight and developing a culture of collective ownership of problems.

4.1.1 Form Clarity Task Force

The Clarity Task Forces serves as an operational task force of member library front-line staff, representing a wide range of expertise. This Task Force is collectively charged with assisting the SWAN Executive Director in evaluating core Library Services Platform software and services and how it is

implemented in our consortium. Membership expertise and creativity are critical to the success of surfacing areas of improvement, increased efficiency, and future exploration/experimentation.

The group will assist SWAN in surfacing and documenting areas of dissatisfaction and frustration with our Library Services Platform, as well as help provide direction in priorities for research and exploration. The group will look at specific areas of inefficiency and concern including:

- acquisitions processing bottlenecks,
- circulation practices,
- resource sharing,
- patron access to resources.

This group will also look at the product roadmap of releases and how that impacts implementation into SWAN's project list and strategic priorities.

4.1.2 Members of the Clarity Task Force

Kerry Halter, Technical Services Manager, Batavia Public Library District,

Kristina Howard, Adult Reference Manager, Tinley Park Public Library

Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora

Amy Prechel, Head of Access Services, Downers Grove Public Library

Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library

Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library

Colleen White, Cataloging Librarian, Oak Park Public Library

4.1.3 Clarity Task Force Study

Clarity met on July 10th to outline a study where library dissatisfaction can be captured in detail using user experience methodologies. These eight libraries are participating in a study within their libraries during the July 22nd through August 12th period. SWAN staff will complete interviews at other member libraries and arrange focus groups of 10 people at 4 regional locations for library staff to attend.

During the summer, members of the Clarity Task Force and SWAN staff will gather input from our members to help identify and surface areas of concerns regarding our Library Services Platform.

The following methods of research will be used:

1. Time studies

2. Diary studies
3. Interviews
4. Focus Groups

The time studies of Symphony WorkFlows and diary studies will include libraries represented by Clarity Task Force members. This will allow Task Force members to help guide their colleagues in completion of these studies. Upon initial review of the studies, Clarity and SWAN will determine if including additional members in these studies would be beneficial to gathering input. There will be a written report compiling what is learned and provide recommendations to the SWAN Board.

4.1.3.1 Time Study

With time slice studies, it is helpful to have a specific day/time for capture of screen recordings. This provides an opportunity to see a cross section of activity across multiple libraries within the same period – enabling review of both commonalities and uniqueness.

This independent capture of Symphony WorkFlows activity will allow us to determine exactly what features of the software are most accessed and the efficiency of that work process. It will help identify areas where finding information of completing actions could be improved. It will reinforce potential differences in periods of the day and at libraries, providing a range of activity patterns to observe. We may also uncover areas where additional training or configuration of the interface could be helpful.

Clarity Task Force members will upload their recordings into a secure online folder in the team-based SWAN Clarity Taskforce SharePoint project. SWAN staff will download these screen captures to a secure storage for coding. The function of coding does not include any barcodes or personal identification. That analysis will capture functions enabled during the session.

4.1.3.2 Diary Studies

Journaling, or diary studies, are intended to provide a method of capturing noteworthy interactions with the software and how that impacts either daily operational work processes or providing services to end users. This is a common methodology employed within user interface design. The journaling activity Clarity Task Force is based on “Universal Methods of Design.”

The journals were distributed to the 8 Clarity Task Force members. Each journal is supplied with a set of prompted or questions which vary slightly based on the role within the library.

4.1.3.3 Interviews

The first group of interviews were determined through volunteers at the SWAN Circulation User Group held in June. Tara Wood and Crystal Vela have been visiting these staff to conduct interviews. These interviews will be compiled as part of the Clarity Task Force Study.

4.1.3.4 Focus Groups

These will be group meetings of 10 staff held in locations north, south, central, and west of SWAN's region. Dawne Tortorella will facilitate these meetings with one other SWAN staff present as notetaker.

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

The strategic plan objective 2 activities noted within the Operations Report include the following:

4.2.1 Improve patron email notification through a volume email service: COMPLETE

Steven Schlewitt shared at the March quarterly meeting on how this new service allows SWAN to better monitor the delivery success of emails. SWAN staff can now verify upon library request if a specific patron email address successfully received an email or bounced.

4.2.2 Provide all SWAN libraries a mobile app through BLUEcloud Mobile: COMPLETE

Tara Wood updated the membership at the March quarterly meeting. We do have some support cases open with SirsiDynix that pertain to some snags encountered in the setup of eResource Central resources within Mobile. Tara has cautioned us that the late April publication in the app store will depend on these cases being resolved. I have escalated these cases with our SirsiDynix Library Relations Manager Pam Arnold.

4.2.3 Develop and pilot a SWAN created Automated Delivery In-Transit Label: COMPLETE

Green Hills Public Library District went live with this online label system. The system was piloted with three member libraries and was announced for general availability on May 28, 2019.

4.2.4 Create a new OCLC holdings update process for SWAN: UNDERWAY

Consortia staff from CCS, Pinnacle, PrairieCat, RSA, SHARE, and SWAN met at RAILS Bolingbrook on March 8th to continue work on the technical requirements for transitioning to a new system.

4.2.5 Perform a catalog discovery evaluation: UNDERWAY

Tara Wood and the DUX group reviewed criteria and weighting for an OPAC evaluation.

4.2.6 Begin an assessment of BLUEcloud Acquisitions: UNDERWAY

SWAN is working with Rebecca Bartlett at La Grange Public Library and Amanda Kaiser at St Charles Public Library on the SirsiDynix Strategic Partner Program for BLUEcloud Acquisitions.

4.2.7 Upgrade Enterprise catalog to mobile friendly version: UNDERWAY

SirsiDynix announced on August 28th the 5.0.1 version of Enterprise. SWAN is in the queue to upgrade our test Enterprise. No date is set yet, but we work with the Discovery & User Experience Advisory group on our test system before scheduling the upgrade to our Enterprise system in use by all libraries.

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

4.3.1 Complete a 501c3 Conversion Study: UNDERWAY

Our attorney has completed the initial review of having SWAN convert from an Illinois Intergovernmental Instrumentality to a 501c3 entity. This 6-page letter is included as a discussion for the April 12, 2019 SWAN Board meeting.

4.4 Objective 5: Strengthen the Collective Identity

4.4.1 Establish Vision & Direction of SWANx19 Event: COMPLETE

The SWAN Expo for 2019 was held on August 16th. The feedback on the event will be shared at the SWAN Quarterly meeting on September 5th.

5 Libraries Interested in SWAN

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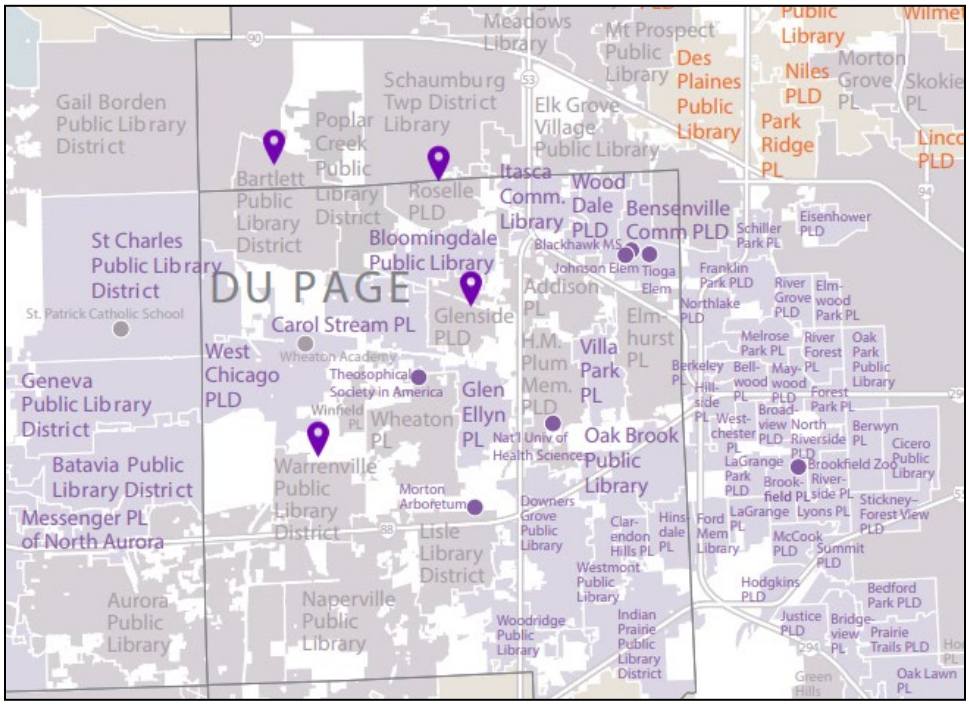
5.1 4 Public Libraries

I have been contacted by the library directors from each of the following standalone libraries, last year in March 2018 with Bartlett and Glenside, and more recently Roselle and Warrenville in April 2019. I have completed quotations for all four libraries. Thus far Glenside and Roselle libraries have accepted the quotation and agreed to the timeline SWAN provided.

LIBRARY	SWAN QUOTATION FY21		CURRENT ILS	LETTER OF INTENT RECEIVED
Bartlett	$	32,445.72	Millennium III	
Glenside	$	45,674.26	Polaris III	Yes
Roselle	$	29,622.80	Library.Solution TLC	Yes
Warrenville	$	29,960.42	Horizon III	

5.2 Region

These libraries are in the area where the New 19 libraries are located. The purple pins in the map below note the location of the four libraries. The four libraries are all within SWAN's geographic region and have significant reciprocal borrower activity.



5.3 Revenue Benefit

The addition of these libraries would bring in an estimated revenue of $137,700 annually to SWAN and increase SWAN's operating expenses $68,420. The net revenue to SWAN would be $69,280 annually. SWAN would receive $34,425 in a one-time joining fee for cash reserves.

5.4 RAILS Catalog Grant

I have provided updates to Anne Slaughter at RAILS on the prospect of four libraries joining SWAN in FY21. It would be possible to apply for the grant and be awarded prior to the project start, as funds must be spent within 18 months of being awarded the grant.

5.5 Tentative Timeline

The SWAN Tactical Plan freezes adding libraries during the FY20 period, July 1, 2019 through June 30, 2020. I have discussed with these libraries the timeline of joining SWAN in the second half of 2020.

Membership approval	June 2020
Migration Project Start	July 2020
Staff Training	October 2020
Go-Live	November 2020

5.5.1 Recommendation

1. SWAN Board endorses moving forward with limiting new membership to 4 libraries in FY21. This can be made an agenda topic at a future Board meeting.
2. Depending on the next round of interested libraries, SWAN should set an "open period" and maximum number for joining. The next window could be July – November 2022.
3. SWAN staff involvement should be limited only to the SWAN Executive Director and Assistant Director with these library conversations and plans for the FY20 period, honoring the tactical plan membership freeze.
4. Update the SWAN directors at the June and September 2019 quarterly meetings and solicit feedback.
5. Use the FY20 period to create a recommended ILS configuration and data mapping for all new incoming libraries.

6 Explore More Illinois & SWAN: Connection Status Update

SWAN and RAILS established a secure patron authentication connection. Libraries interested in joining the service will need to contact RAILS. Explore More Illinois has wide participation among SWAN member libraries. As of this report, 66 libraries are live on the system. Jessica Barnes at RAILS shared the following list of libraries now active on the service.

Acorn PLD	Glenwood-Lynwood PLD	Oak Lawn PL
Bellwood PL	Green Hills	Oak Park PL
Berwyn PL	Harvey PLD	Palos Heights PL
Blue Island PL	Hillside PL	Palos Park PL
Bridgeview PL	Hinsdale PL	Park Forest PL
Broadview PLD	Homewood PLD	Prairie Trails PLD
Brookfield PL	Indian Prairie PLD	Richton Park PLD
Calumet City PL	Justice PLD	River Forest PL
Carol Stream PL	Kaneville PLD	River Grove PLD
Chicago Heights PL	La Grange PL	Riverside PL

Chicago Ridge PL	LaGrange Park PLD	Schiller Park PL
Clarendon Hills PL	Lansing PL	St. Charles PLD
Crete PLD	Lyons PL	Steger-South Chicago Heights PLD
Downers Grove PL	Matteson PL	Stickney- Forest View PLD
Elmwood Park PL	Maywood PLD	Sugar Grove PLD
Evergreen Park PL	McCook PLD	Summit PLD
Flossmoor PL	Melrose Park PL	Thomas Ford Memorial Library
Forest Park PL	Messenger PL of North Aurora	Tinley Park PL
Frankfort PLD	Midlothian PL	Town & Country PL
Franklin Park PL	Nancy McConathy PL	West Chicago PLD
Geneva PLD	North Riverside PLD	Westchester PL
Glen Ellyn PL	Northlake PLD	Worth PLD

7 Find More Illinois & SWAN: Connection Status Update

Find More Illinois is an effort led by RAILS to create a resource sharing union catalog with Auto-Graphics solution. The individual libraries participating represent various Illinois consortia. There is a cost to being a member of Find More and it does require arranging with RAILS your library's participation. SWAN staff also will need to be involved in the configuration and code mapping.

SWAN and RAILS have established a secure authentication of patron information using SWAN's OpenAthens service.

Frankfort Public Library is working with RAILS to become the first SWAN member library connected and participating in the service.

SWAN Operations Report: Q3 2019

1 SWAN ADMINISTRATION

Dawne Tortorella, Assistant Director

As we revise our reporting within the Operations Report, we would appreciate feedback or recommendations on how to convey member engagement and interaction. Currently we have broken this out in each section, but it may be more effective as a combined report of activities related to site visits, training, and networking.

1.1 BLUECLOUD STAFF CLIENT RESEARCH & DEVELOPMENT

Much work is being done by the BLUEcloud Acquisitions Phase III participants and our teams are staying on top of assignments, providing weekly updates to SirsiDynix' development team.

We thank our volunteers for their time and expertise in this work. Their input and voices are important to the application development efforts by SirsiDynix and to SWAN as we assess product readiness and work to increase efficiencies and ease of use in your daily work.

BLUEcloud Central	**BLUEcloud Cataloging**
Steven Schlewitt, SWAN	Scott Brandwein, SWAN
Rudy Host, SWAN	Samantha Dietel, SWAN
Ian Nosek, SWAN	Claudia Nickson, SWAN
Dave Pacin, SWAN	Diane Nickolaou, SWAN
Michael Szarmach, SWAN	Joy Anhalt, TPS
Vickie Totton, SWAN	Amanda Kaiser, SCD
	Julie Tegtmeier, SCD
BLUEcloud Circulation	**BLUEcloud Acquisitions Pilot**
Tara Wood, SWAN	Scott Brandwein, SWAN
Crystal Vela, SWAN	Samantha Dietel, SWAN
Peggy Tomzik, ESS	Claudia Nickson, SWAN
Ridgeway Burns, HDS	Vickie Totton, SWAN
Bonni Ellis, SCD	Rebecca Bartlett, LGS
	Linda Ertler, LGS
	Amanda Kaiser, SCD
	Julie Tegtmeier, SCD

1.1.1 BLUEcloud Acquisitions Pilot Update

This pilot is run by SirsiDynix and is a more rigorous and time-constrained pilot project. The pilot testing schedule includes:

May 27-July 12:	Pilot Preparation (training and system configuration)
July 15-27:	Setting up BLUEcloud Acquisitions
July 29-Aug 2:	Managing Fund Accounts
Aug 5-9:	Managing Vendor Records
Aug 12-16:	Managing Selection Lists
Aug 19-23:	Selecting Titles
Aug 26-Sept 6:	Creating and Managing Orders
Sept 3-6:	Pilot Status Meeting
Sept 9-13:	Receiving Ordered Material
Sept 23-27:	Running Acquisitions Reports
Sept 30-Oct 4:	Processing Year-End
Oct 7-11:	Security & Consortia Support
Oct 14:	Pilot End

During the pilot, we will be answering the following questions:

1. What areas of BC Acquisitions provide you the ease-of-use experience?
2. What features do you prefer in BC Acquisitions over Symphony Acquisitions?
3. What features to you prefer in Symphony Acquisitions over BC Acquisitions given that both products have the given features?
4. How likely are you to take BC Acquisitions live?
5. If you can't take BC Acquisitions live, what features are keeping you from going live?
6. How would you improve the implementation experience for new customers adopting BC Acquisitions?
7. How would you improve the product training you received for new customers adopting BC Acquisitions?

After the pilot, our pilot libraries and SWAN staff will determine work processes and situations where BLUEcloud Acquisitions may be considered production-ready. This many mean new libraries wanting to use acquisitions are transitioned directly into BLUEcloud Acquisitions. It could also provide some hybrid approaches where some libraries use Selection Lists in BLUEcloud Acquisitions while continuing to use Symphony Acquisitions.

We greatly appreciate the time and expertise our partner libraries are devoting to research, development, and feasibility testing in the BLUEcloud staff client software suite.

1.1.2 BLUEcloud Cataloging, Circulation

Work continues on the assessment and evaluation of Cataloging and Circulation features and functional readiness of the BLUEcloud staff client. SWAN staff conducted an overview session for member participants and distributed BLUEcloud Central accounts required to access these web-based applications.

While these products are not ready for large-scale deployment within the membership, our library partners assisting with evaluation are determining potential niche staff functions where these applications may be ready to use in a production environment. We will continue to be active in the SirsiDynix Strategic Partners Program for both Cataloging and Circulation, to provide ongoing input into product development. Based on time commitments of member libraries, we will look to rotate participating members to involve more member libraries in the future and to share responsibility in research and development activities related to the future staff client.

1.2 Curriculum of Training for Member Library Staff

SWAN has released training sessions through December 31, 2019. All SWAN events and training sessions can be found at:

https://www.librarylearning.info/tags/?SWAN2019

We are expanding our training options in both content and format. Starting in July, GoToMeeting sessions will be provided as a format to allow staff to take shorter courses online. The format is intended to provide 60 minutes of guided demonstration and training, followed by 30 minutes of Q&A. These sessions will be recorded so that we can share widely with the members and facilitate training whenever convenient for members.

This online format supplements our existing hands-on labs, open consultation sessions (Open Labs) and lecture/discussion workshops. The course offerings include:

- Acquisitions Overview (1.5 hours) [GoToMeeting]
- Pre-cat Training (1.5 hours) [GoToMeeting]
- BLUEcloud Analytics Overview (2.5 hours) [Hands On Lab]
- BLUEcloud Analytics Advanced (2.5 hours) [Hands On Lab]
- Open Lab: BLUEcloud Analytics (2 hrs) [Open Lab – SWAN HQ]
- OCLC Connexion Import (2 hours) - consulting/by request on site [By request, on site]
- OCLC WorldCat Discovery and WorldShare ILL Integration (2.5 hours) [Lecture– In Person]
- SWAN Resource Sharing Overview (1.5) [GoToMeeting]
- OCLC WorldShare ILL - Setting Up Groups and Deflection (1.5 hours) [GoToMeeting]
- Open Lab: OCLC WorldCat Discovery and ILL Configuration (2 hrs) [Open Lab – SWAN HQ]
- Article Search and EBSCO Discovery Service for Reference Support (1.5 hrs) [GoToMeeting]
- Searching in Workflows (1.5 hours) [GoToMeeting]

- Serials Control Workshop (1.5 hours) [GoToMeeting]

We are soliciting additional ideas for development and have the following on our 2020 wish list so far:

- Setting up OCLC Interlibrary Loan Fee Management (IFM) (1.5 hr)
- Using OCLC Article Exchange for Electronic Copies (1.5 hr)
- What is BLUEcloud? (1.5 hr)
- Serving Homebound Patrons Using WorkFlows Outreach (1.5 hr)
- SWAN Office Hours monthly online drop-in hours (1.5 hrs)
- Bookclubs: Best Practice and Examples (1.5 hr) - maybe online panel with a couple of members
- Highlighting SWAN Cataloging Standards (1.5 hr)
- Tracking Open Tickets with SWAN and Best Practice for Submitting Tickets (1.5 hrs)
- SWAN Library Services Platform – An Overview of Systems & Services (1.5 hrs)
- Short video BLUEcloud Analytics segments (3-5 minutes each)

1.2.1 Online Training Resources

Training sessions that are conducted via GoToMeeting are recorded and made available to all members at their convenience. As additional training sessions are offered, these resources can be accessed on the SWAN Support Site - https://support.swanlibraries.net/meetings-trainings/tutorials. Feedback from members has been positive in providing these recordings and the continuous development of topics.

Watch our classes online at your convenience:

Searching in WorkFlows

Using WorkFlows and Enterprise Search to Assist Patrons

Creating Pre-Cats

Serial Control

Symphony Acquisitions Overview

Look under the Meetings & Trainings menu on the support site for Tutorials & Training Resources for the growing selection of recorded sessions and class resources.

1.3 Exposing Consortial Holdings Work Group (RAILS)

A working group established by RAILS as part of the RAILS Consortia Committee. This working group has been tasked with examining the challenges and need to expose consortial holdings. This working group was formed after the Illinois consortia staff began work to replace The MARC of Quality OSMOSIS service, which will end in June 2020. Dawne is a member of the working group. Aaron, Scott, and Dawne have prepared a written overview of what consortial holdings are and why they are important in the work we do in SWAN. That overview is provided as Addendum A to this Operations Report.

1.4 HOLDS DEMAND MANAGEMENT

Holds fulfillment management within a large consortium is challenging. The goal is to get the requested title into the hands of the patron as quickly as possible. This requires balancing two potentially conflicting configuration settings: allowing dynamic holds (first available copy triggered) vs filling the hold with an on-shelf item at the pick-up library.

An evaluation team of SWAN staff and members will be working to examine configuration settings and impact on holds management.

The detailed workplan for analysis of Holds Management of impact of system changes is provided as Addendum B to this Operations Report.

2 SWAN IT & SYSTEM SUPPORT SERVICES

Steven Schlewitt, IT & System Support Manager

2.1 TRANSIT DELIVERY LABEL GENERATOR UPDATE

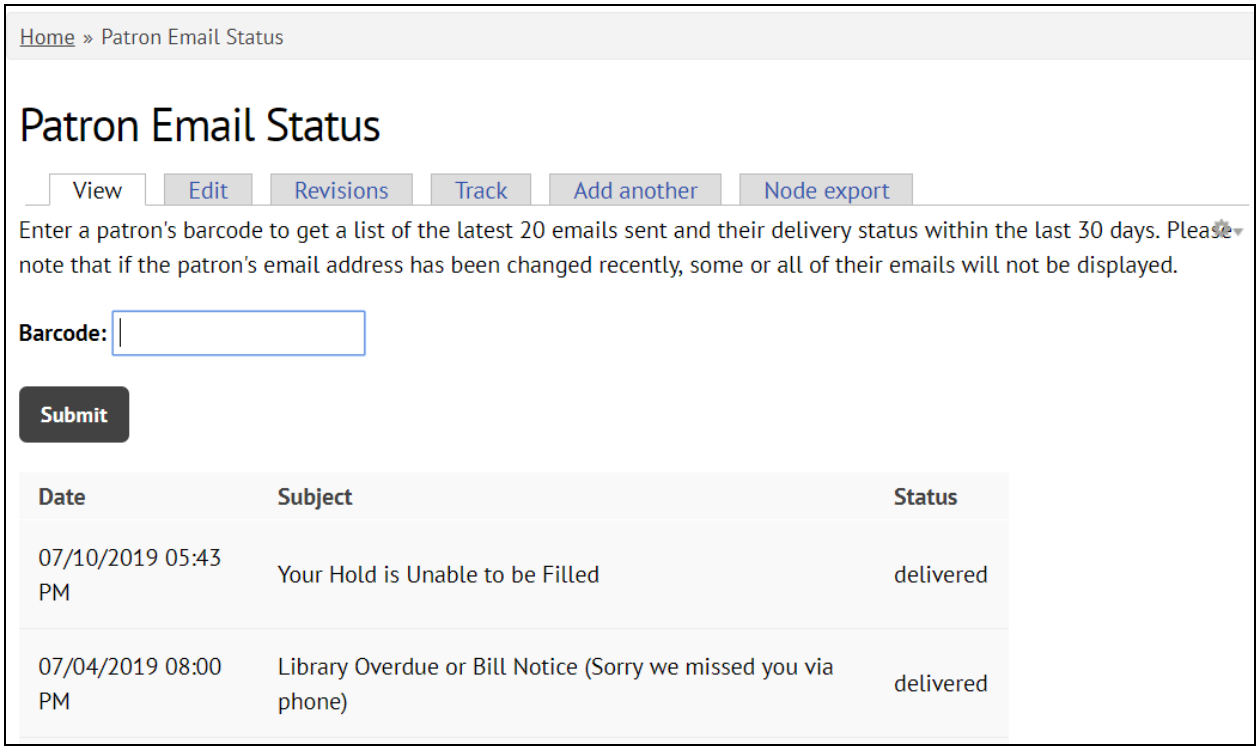
We estimate 20 libraries now using the automated delivery label for in-transit items. Rudy Host has continued development work to adapt the utility for delivery transits outside of the SWAN membership. The function currently under development recognizes the receiving library, automatically checks the material out to the appropriate external library account, and generates the corresponding label needed by RAILS to transit to the correct RAILS delivery hub and library. We are also testing a new feature to reprint a label.

2.2 ONLINE PATRON REGISTRATION

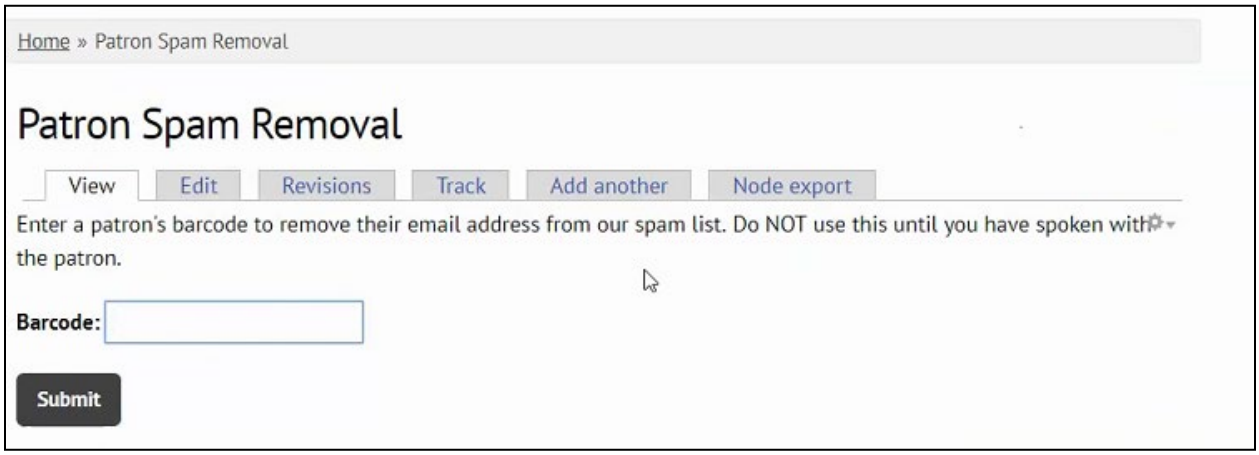
On June 27th, Steven Schlewitt, Dave Pacin, Rudy Host, and Vickie Totton met with Martyn Churchouse of the Oak Park Public Library to review initial requirements and prospects for a long-anticipated Online Patron Registration tool. With recent update enhancements to Symphony Web Services and Rudy's growing skillset in development against the platform, the IT team is now confident that a custom utility can be created to serve SWAN patrons. The project is currently only in a planning stage, but more information will be shared in the upcoming months.

2.3 PATRON EMAIL STATUS AND SPAM WHITELISTING TOOL

Rudy Host has started development on a new Support Site-integrated tool that works with the SendGrid email API to lookup the status of a patron's most recent notice emails. By entering a patron's barcode, library staff will be able to verify email delivery success, the date/time, and the subject of recent notices sent.



Additionally, a related tool has been developed to remedy patron addresses that have marked SWAN as SPAM, after confirmation from the patron that they've whitelisted the SWAN server. If a patron is identified in the status tool as having marked SWAN emails as SPAM, library staff will have the option to remove them from a SPAM list after having spoken and resolved the issue with the patron.



2.4 SWAN Community Forums

After several months of internal discussion and investigation, the IT team has settled on a platform and host for the SWAN community forums, a project that will span all departments in the initial configuration and pilot. Rudy Host configured the open source Discourse threaded discussion board in

the SWAN Azure Cloud environment. Tara and the UX team then spent some time customizing the site and creating guidelines for use, and Scott alongside the Bib Services team will soon demo the forums in a limited pilot with a catalogers group. The pilot phase will potentially expand in the upcoming months based upon adoption of the platform.

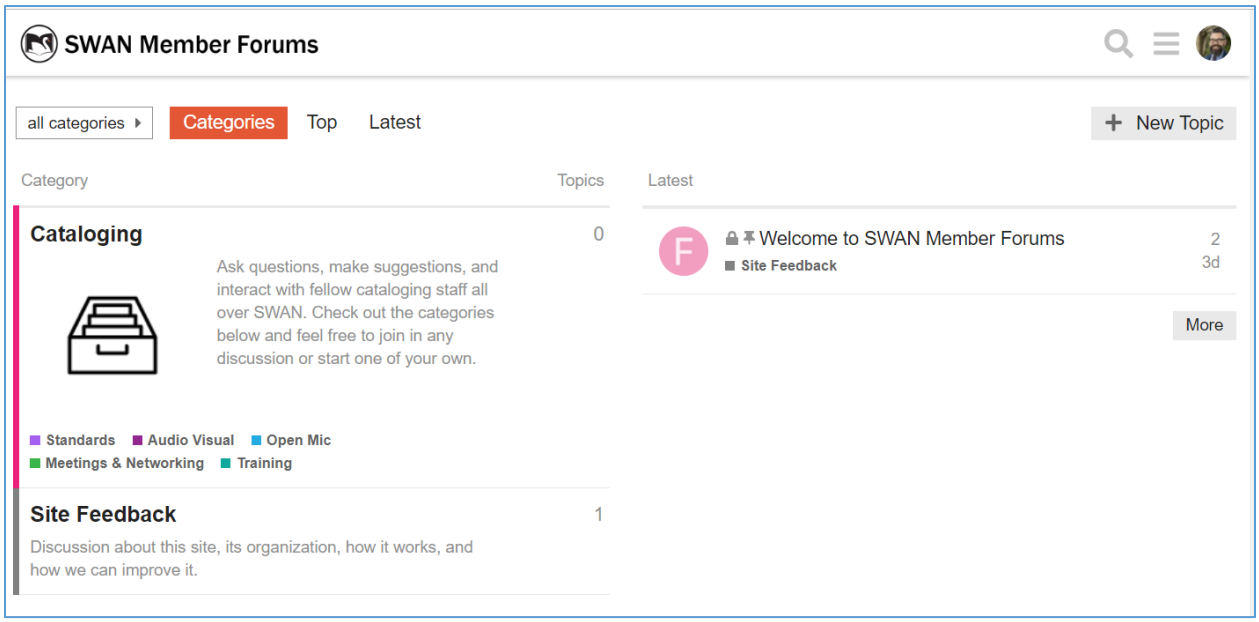


Figure 1 Built on the open source platform Discourse, SWAN is piloting forums with the Cataloging Libraries

2.5 SonicWall Patching for Urgent/11 Vulnerabilities

On July 29th, through various news outlets, Rudy Host identified a significant vulnerability impacting the SonicWall firewalls that SWAN depends on for our network VPN solutions. Rudy quickly patched the managed library SonicWalls impacted by the vulnerability and ensured minimal downtime by deploying the updates after-hours. He also coordinated updates with Self-Maintainer libraries to ensure their firewalls were patched to SWAN's expectations.

2.6 Email Notice Tracking

June

SWAN sent 409,491 email notifications in the from the SWAN Symphony server over the past 30 days. SWAN observed a delivery success rate of 98.75% (404,357), with 0.14% (555) of those emails bouncing due to a patron email issue and 0.01% (23) of those emails reported as SPAM by the patron.

July

SWAN sent 429,322 emails from the Symphony server over the previous 30-day period and observed a delivery success rate of 98.73% (425,857), with 0.16% (707) of those emails bouncing due to a patron email issue and 0.00% (13) of those emails reported as SPAM by the patron.

August

SWAN sent 442,865 emails from the Symphony server over the previous 30-day period and observed a delivery success rate of 98.96% (438,241), with 0.17% (740) of those emails bouncing due to a patron email issue and 0.00% (1) of those emails reported as SPAM by the patron.

The remaining amount reflect a "delivering" status. While the majority of emails sent from the SWAN server are patron notifications, some emails counted here include Symphony reports and statistics for staff.

2.7 OUTAGE TRACKING

SWAN IT & System Support tracks the outages that occur with Enterprise or Symphony ILS server.

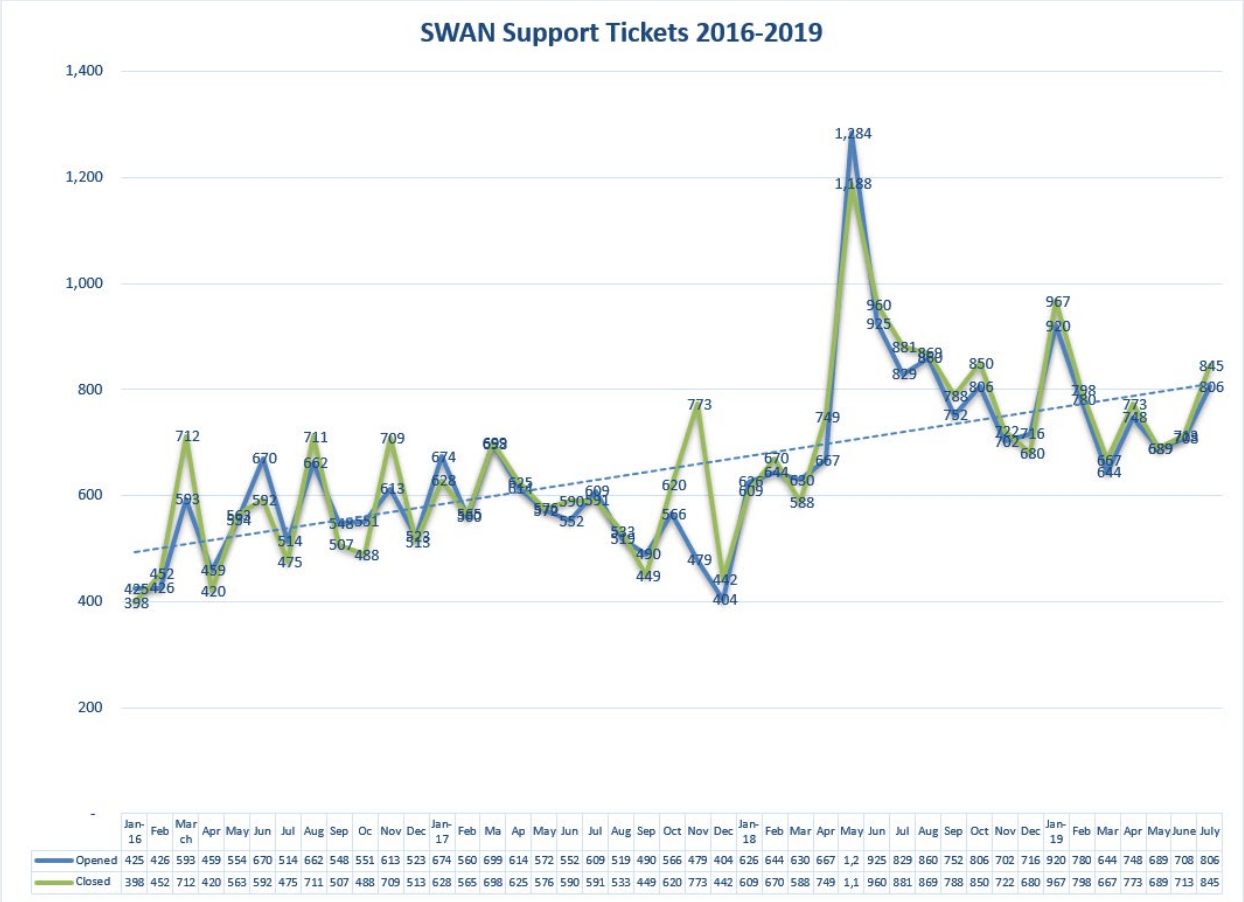
Date	Time	Min	Service	Planned?	Lib Hours?	Reason
6/1/2019	10:00	2	Enterprise	No	Yes	Web services outage following brief Symphony server load spike
6/22/2019	19:10	5	Enterprise	No	Yes	Enterprise service restart due to harvesting error
6/22/2019	19:10	5	Enterprise	No	Yes	Enterprise service restart due to harvesting error
6/24/2019	19:03	5	Enterprise	No	Yes	Enterprise service restart due to harvesting error
6/28/2019	21:22	5	Enterprise	No	No	Enterprise service restart due to harvesting error
7/1/2019	19:03	5	Enterprise	No	Yes	Enterprise service restart due to harvesting error
7/2/2019	19:14	5	Enterprise	No	Yes	Enterprise service restart due to harvesting error
7/4/2019	19:08	5	Enterprise	No	Yes	Enterprise service restart due to harvesting error
7/6/2019	10:42	5	Enterprise	No	Yes	Web services outage and restart due to search load spike
7/6/2019	19:05	5	Enterprise	No	Yes	Enterprise service restart due to harvesting error
7/8/2019	22:02	5	Enterprise	Yes	No	Enterprise service restart to resolve ongoing harvest errors

Date	Time	Min	Service	Planned?	Lib Hours?	Reason
7/29/2019	14:28	25	Enterprise	No	Yes	Web services outage and restart due to search load spike
8/1/2019	5:05	10	Enterprise	No	No	Unknown Enterprise outage
8/9/2019	15:43	5	Enterprise	No	Yes	Unknown Enterprise outage
8/13/2019	13:19	5	Enterprise	No	Yes	Web services outage and restart due to search load spike
8/13/2019	14:15	5	Enterprise	No	Yes	Web services outage and restart due to search load spike
8/18/2019	19:33	5	Enterprise	No	No	Unknown Enterprise outage

2.8 SUPPORT TICKETS

As of August 28th, 67 tickets are currently open. Steven Schlewitt has trained and allocated additional IT staff to the support and on-call rotations for this period, which seems to have helped balance the load of tickets. Specifically, Ian Nosek has joined the weekly support call rotation and Dave Pacin has joined the on-call rotation, ensuring four possible staff to be assigned for each function.

Ticket categories have been updated this past quarter to provide better internal tracking of trends and severity of issues.



	Jan-16	Feb	March	Apr	May	Jun	Jul	Aug	Sep	Oc	Nov	Dec	Jan-17	Feb	Ma	Ap	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan-18	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan-19	Feb	Mar	Apr	May	June	July
Opened	425	426	593	459	554	670	514	662	548	551	613	523	674	560	699	614	572	552	609	519	490	566	479	404	626	644	630	667	1,2	925	829	860	752	806	702	716	920	780	644	748	689	708	806
Closed	398	452	712	420	563	592	475	711	507	488	709	513	628	565	698	625	576	590	591	533	449	620	773	442	609	670	588	749	1,1	960	881	869	788	850	722	680	967	798	667	773	689	713	845

3 SWAN BIBLIOGRAPHIC SERVICES

Scott Brandwein, Bibliographic Services Manager

3.1 OSMOSIS/PROJECT X (OHM) UPDATE

We have decided to do some further testing before settling on a final plan for the tool we are creating to maintain OCLC holdings. We have spoken with OCLC and received an API key. OCLC has a number of tools in their API that can assist with searching, record download and overlay, and the maintenance of holdings and local holdings records. We are exploring the possibility that folding these tools into the OSMOSIS replacement tool can help us create a more dynamic, light-weight solution.

Project X also finally has a name. We are simply calling it OHM for “OCLC Holdings Manager.” This is how it will be referenced going forward.

3.2 Cataloging Standards Task Force & Future of Cataloging Advisory Group

This group will have its last meeting in the first week of September. We will be concluding our discussion of required MARC fields (subject headings, added entries, access, and record cross references). We will also discuss next steps in distributing, maintaining, and updating these standards, which will likely become the charge of a new form of Cataloging Advisory Group. The current format of Cataloging Advisory has become a bit too large. I'd like to make Cataloging Advisory into more of a working group like this task force. It would be responsible for ongoing maintenance of standards, recommending practice changes to suit our patron's needs, and building a system for auditing and providing feedback on incoming catalog and pre-cat records.

If we go that direction, I would anticipate maintaining the current format of Cataloging Advisory under a different name and possibly chaired by a Bibliographic Services Consultant. Both groups would meet regularly. We are still in the planning phase, though I would like to settle on a new format by calendar year 2020. My goal is to announce any changes at the Cataloging Advisory Group taking place in November.

3.3 New Acquisitions Service Tier

We have been working with Forest Park and Acorn on getting them started with a slightly new system. Both libraries approached SWAN for information about using the Acquisitions module and concluded that full use of the module's ordering tools was not necessary. Instead, they preferred to import vendor pre-cats with on-order item information only rather than inputting this information by hand.

Bibliographic Services has devised a way to accomplish this using the "Load Bibliographic Records" Symphony Report (Note: Symphony "Reports" can also be scheduled scripted tasks, such as generating patron notices, sending patron text messages, processing Symphony Acquisitions, etc.). This Symphony Report is generally used by SWAN and our Cataloging Libraries to import full catalog records, but we have set up a template that will allow it to mimic the functionality of the "Load Bibs with Order Info" report without importing order records. Basically, this template will allow the loading of vendor pre-cats using the same logic as the acquisitions process, namely that records unique to the system will be imported and generate item records, while records finding a match will not overlay their match and instead attach an item record only.

We hope this proves a useful tool for the two libraries piloting it. The Bibliographic Services team is happy to have this system in place as vendor pre-cats are on the whole more robust than their hand-keyed equivalents.

3.4 MARCIVE Comprehensive Notification Service

MARCIVE, our vendor who provides bibliographic updating and authority control services that enhance our bibliographic collection, has sent the data we receive as part of our Comprehensive Notification Services package. This is a service that tracks changes to author, title, subject, and series headings and sends SWAN updated bibliographic records reflecting those changes. Files of new, updated, and deleted

authority records accompany the updated bibliographic records. We also receive records reflecting enhancements to MARCIVE's bibliographic clean-up and RDA conversion services.

We received 45,000 updated bibliographic records, which was complete by July 17th.

3.5 Cataloging Counts: SWAN Bibliographic Services

Counts do not include nineteen cataloging libraries. Original cataloging counts are new records created for SWAN and added to the OCLC WorldCat database. Copy cataloging counts are records downloaded from OCLC and added to SWAN's bibliographic database.

For May, there were 98 upgrades of minimal level records in OCLC to full records.
For June, there were 123 upgrades of minimal level records in OCLC to full records.
For July, there were 144 upgrades of minimal level records in OCLC to full records.

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
Orig 2017	96	132	169	131	133	209	266	184	96	195	93	112	**1,816**
Copy 2017	3,133	3,616	3,203	3,576	3,456	2,954	3,848	4,856	3,031	3,135	3,392	4,054	**42,254**
Orig 2018	122	89	147	70	119	148	118	167	116	209	194	92	**1,591**
Copy 2018	3,896	3,348	5,157	4,614	2,851	1,493	2,138	2,459	2,010	1,866	1,376	2,056	**33,264**
Orig 2019	126	82	106	211	92	163	127						
Copy 2019	2,565	1,952	1,939	2,352	2,032	2,070	1,672						

4 SWAN User Experience

Tara Wood, User Experience Manager

4.1 BLUEcloud Mobile

BLUEcloud Mobile app launched July 16th, and 1,909 new devices downloaded the app in July 2019.

Lauren Levaggi is preparing BLUEcloud Mobile administrator documentation and preparing for the two trainings in app administration at the end of August and September. The app administrator training will be offered online, and sessions will be recorded for libraries who cannot attend. Administrator logins have been provided to library directors through the SWAN support site shortly and will be reference during the training.

In addition, statistics for BLUEcloud Mobile are now available through the SWAN support site.

4.2 Article Search – EBSCO Discovery Service

All SWAN libraries are now live with Article Search, the EDS (EBSCO Discovery Service) integration with Enterprise. This was a huge undertaking for Robin Hofstetter, Electronic Resources Consultant. They cleaned up the EDS configurations for all 97 of our libraries and set up the EDS integration for around 60 libraries that were not yet set up. For those libraries that do not have subscription databases or only subscribe to databases that are not compatible with EDS (such as ProQuest resources), Robin selected several open access databases so that content would be available to those library users.

Robin is also conducting training sessions in August and September on using Article Search with patrons, and a recording of those sessions will be available through the SWAN support site.

4.3 Freegal Records in Enterprise

The Freegal connector is now available for any library that request it. So far, three libraries have requested the connector. Glen Ellyn, our pilot library, is live in Enterprise for any libraries that would like to see the Freegal connector in action.

4.4 Continuing Education Class on User Experience Research and Design

The UX Team began the "Understanding User Needs" course, which is the second course required to complete in the UX Certification process. We are learning more about conducting interviews and observations and analyzing results through affinity diagramming – just in time for several research projects coming up, including Crystal's BLUEcloud staff client evaluation, and Robin's analysis of Article Search in reference interactions and instruction sessions.

5 SWAN Advisory & User Group Updates

5.1 Cataloging Advisory Group

Chair: Scott Brandwein, SWAN

The Cataloging Advisory Group met on August 22nd at Oak Lawn Public Library.

Scott Brandwein presented the final documents regarding new guidelines for Blu-Ray/DVD Combo Packs, bibliographic records for book club kits, and the use of standard numbers (ISBN, UPC, etc.) in records. Bibliographic Services has been working to change the way matching on standard numbers works in Symphony. It has required changes to our database indexing structure, and while testing is still underway, we have enough information to finally present on the findings. This meeting included a presentation on the cataloging tool BART that Oak Lawn has been using to import and overlay records.

5.1.1 Cataloging Standards Task Force

The task force continues to work our way through a MARC record field by field, highlighting required fields and recommended practices. The discussion encompasses edition statements, publication information and dates, physical description, and the relatively new content, format, and encoding codes that are part of RDA description.

Scott proposed a change to our database's indexing structure that will fine-tune how standard numbers (ISBNs, ISSNs, and UPCs) are treated by Symphony's internal processes. The plan should allow us to retain all instances of these numbers for search and retrieval, while limiting increasing the accuracy of bibliographic matching. We can align this change with widely-accepted cataloging standards (i.e. SWAN cataloging will not need to be a special case.) After it is implemented, and some clean-up takes place, I anticipate that batch-loading, especially through Acquisitions, will be a much cleaner process for SWAN staff.

All members of the group are registered for our online SWAN Community Forums and we hope that platform will be a place to continue these discussions.

5.2 Circulation Advisory Group

Chair: Crystal Vela, SWAN

The Circulation Advisory Group met on July 15th at the RAILS Burr Ridge main meeting room.

Crystal, as chair, recommends that Circulation Policy review be moved to an annual process with concerted review and effort in this process. As such, the group was asked to begin homework on reviewing the policy in detail and make suggested additions and changes. Bring those suggestions and discussion to the September meeting where ideas will be worked out in group activity. Circulation Advisory will submit any recommended changes to the SWAN Executive Director for review prior to submission to the SWAN Board.

Dave Pacin outlined patron field consolidation work he has been working through. All changes were applied in the test environment to determine impact. Close to 700,000 patron records required updating. About 200,000 were completed in July. Big thanks to Dave Pacin for this work.

BLUEcloud Circulation was shared with the group as a development project with SWAN libraries and SirsiDynix.

Circulation Advisory discussed ways to reduce the number of printed notices generated across the consortium as a way to reduce cost but still adequately inform patrons. The idea of a "Go Green Campaign" was discussed.

Book Discussion documentation has been posted on the SWAN support site, including the "neighborly practices" that should be shared with library staff involved in book discussions.

Vickie shared that there are now two SVA Failed Calls report. One includes pickup notice failures and the other overdue notice failures. You can now review patrons that may not be receiving their overdue

notices, as well as hold pick-up. Sort these reports alphabetically to identify your library code. If you do not see your library name in the overdue or pick-up notices, you do not have any patrons with missed calls.

Discussion continued from earlier meetings related to disparity between how libraries identify items as unusable and how to come to consensus on these decisions that impact billing.

Crystal reminded the group that elections are held in October with new member terms starting in November. To even the expiration of seats, Sue Feddersen agreed to stay on for an additional year. We are looking for a shortened timeframe for the election process this year. The self-nomination form will be posted in September, followed by a 2-week voting period in October. Crystal asked for ideas on roles and responsibilities of this group, as well as reviewing the group charge. There will be additions to the charge to add a level Charge changes to add involvement

Rudy Host demonstrated the new ability for library staff to check if a patron received their notifications via email. SendGrid is the bulk email service we migrated to with the migration to the cloud. With this new service we now have additional tools we can access to check status and delivery of email.

5.3 Discovery and User Experience (DUX) Advisory Group

Chair: Tara Wood, SWAN

DUX met in June and August at the Oak Brook Public Library.

In the last DUX meeting, we worked on a journey mapping activity to chart how eBook and eAudiobook downloads from Enterprise work (and don't work). DUX members worked in pairs to do mock usability testing of the process to download an eBook or eAudiobook, charted the steps, and identified the "highs and lows" of the experience – what steps were most frustrating, and what steps were most enjoyable.

Scans of the journey maps are available on the SWAN support site.

Tara and Robin are using the journey maps to develop a service map – basically an ideal process of how we would like the process of finding, downloading, and viewing eRC items from Enterprise to work. With that service map, we will be able to submit enhancement requests to SirsiDynix and implement some improvements through our own development.

As a follow-up to the journey mapping activity in the June DUX meeting, the July DUX meeting largely focused on a sketching activity to take the issues identified in the journey maps and sketch out ideas to improve the process to download eBooks and eAudiobooks from Enterprise. Tara and Robin are analyzing the results of both of these activities to generate wireframes to provide to SirsiDynix along with a service map, or an ideal process of how we would like the process of finding, downloading, and viewing eRC items from Enterprise to work.

In addition, we conducted a "post-mortem" of the BLUEcloud Mobile rollout process, and we further discussed topics to address in a future eResources group.

5.3.1 Exploration for an eResources Group

Tara and Robin are investigating the possibility of an eResources Group. DUX members are currently discussing through the DUX email list how they would like to see this group work and how frequently it should meet. So far, DUX members are enthusiastic about having a separate group to dig into issues around authentication, consortia-wide purchases, vendor negotiations, and instruction and marketing for e-resources to name a few.

5.4 Outreach Users Group

Chair: David Kelsey, St Charles Public Library

The Outreach Users Group met on July 26 at the RAILS Burr Ridge main meeting room.

David led the attendees through an overview of how the libraries had an outreach program at the library, including how many patrons are served and the number of senior facilities and schools. The primary duties of the outreach services groups were shared by the attendees. Libraries that are using the Symphony Outreach module shared with those in attendance that are providing outreach services but are currently not using the software.

5.5 Circulation Users Group

Chair: Peggy Tomzik, Eisenhower Public Library District

Crystal and Tara attended the Circulation Users Group meeting in June, which was led by Peggy Tomzik. A major topic discussed was issues around billing and handling of damaged items. Some libraries are more aggressively billing for damage than others, and perhaps in response, other libraries are rejecting items for loan with light damage/normal wear. Helen Pinder from SWAN will be digging into data about libraries that are frequently billing for damaged items, and Tara, Crystal, and Dawne will work with her to identify patterns that could inform next steps in this discussion.

5.6 Serials User Group Meeting

This meeting included a demonstration of new BLUEcloud Analytics reports of serials data, instruction on generating custom chronology patterns using lists, and updates on ongoing projects. Member discussion topics included claiming practices, quirks in issue sorting by chronology, publications with irregular and unpredictable editorial calendars, and the desire to establish a platform to communicate when publications cease or change chronology with other members.

5.7 ILL User Group

Chair: Dawne Tortorella, SWAN

Dawne shared with the group the Analytics reports SWAN created for the ILLINET Traffic Survey. The changes to SWAN's Internet Access libraries was outlined for the group. The group shared training tips on OCLC WorldShare ILL and the IFM billing.

6 MEMBER ENGAGEMENT – ALL STAFF

6/5 – Clarity Task Force (Aaron, Dawne, Scott, Steven, Tara)

6/6 – St. Charles site visit for RFID discussion (Ian, Vickie)

6/6 – SWAN Quarterly Meeting (Aaron, Dawne, Tara, Robin, Crystal, Scott, Ian)

6/7 – LLSAP Cataloging Managers (Dawne, Scott)

6/7 – Messenger Library of North Aurora - Batchloading/OCLC Connexion Training (Scott, Claudia)

6/12 – ILL User Group (Scott, Vickie, Crystal, Dawne-chair, Helen)

6/13 – Serials User Group (Scott, Sam-chair, Claudia, Diane, Angela, Sue, Vickie)

6/14 – Cataloging Standards Task Force (Scott-chair, Sam, Claudia, Diane, Angela, Sue)

6/14—BLUEcloud Staff Client Consulting with SirsiDynix (Tara, Crystal)

6/17 – RAILS Exposing Consortial Holdings Working Group (Dawne, Scott)

6/19 – Circ Users Group Meeting (Crystal, Tara, Sam, Steven, Michael, Dave, Dawne, Helen)

6/27 – Oak Park site visit to discuss Online Patron Registration (Steven, Rudy, Dave, Vickie)

6/2 6/20 - BLUEcloud Analytics Open Lab (Bib Srvs: Sam, UX: Crystal)

6/26 - Site Visit Green Hills Public Library District (Adm: Dawne)

6/27 - Site Visit Oak Park Public Library (IT: Steven, Vickie, Save, Rudy)

6/27 - Discovery and User Experience (DUX) Meeting (UX: Tara-chair, Robin, Bib Srvs: Scott, Adm: Dawne)

7/1 - South Holland Credit Card Swipe Installation (IT: Dave)

7/5 - LLSAP Cataloging Managers (Adm: Dawne, Bib Srvs: Scott)

7/8 - Workflows Circulation Evaluation Interviews (UX: Crystal, Tara) [Acron Public Library District]

7/8 - Workflows Circulation Evaluation Interviews (UX: Crystal, Tara) [Alsip-Merionette Park Public Library District]

7/9 - Geneva site visit to license MobileCirc devices (IT: Michael, Vickie)

7/10 - Clarity Task Force (Adm: Aaron, Dawne, Bib Srvc: Scott, IT: Steven, UX: Tara)

7/10 - BLUEcloud Analytics Open Lab (Adm: Dawne, UX: Crystal)

7/11 - Online Training: Creating Pre-Cats (Bib Srvs: Claudia)

7/11 - BLUEcloud Circulation & Cataloging Research Meeting (Bib Srvs: Scott, Diane, Claudia, US: Tara, Crystal, IT: Steven, Ian, Dave, Michael, Vickie, Adm: Aaron, Dawne-chair)

7/11 - SirsyDynix BLUEcloud Acquisitions Pilot Kick-Off Meeting (Adm: Dawne, Bib Srvs: Scott, Claudia, IT: Vickie, Steven, Dave)

7/12 - SirsiDynix Sure Sailing7 – Discovery and User Experience (DUX) Meeting (Tara-chair, Robin, Lauren, Ian…

7/15 - Bibliographic Cataloging Standards (Bib Srvs: Scott, Sam, Diane, Claudia, Angela, Sue)

7/16 - Site Visit (IT: Michael) [Steger-South Chicago Heights Public Library District] credit card swipe installation

7/16 - Training: Serial Control (Bib Srvs: Sam)

7/17 - Circulation Advisory Meeting UX: Crystal - chair, Tara, Bib Srvs: Sam - co-chair, IT: Steven, Vickie, Michael, Rudy, Dave, Adm: Dawne, Helen)

7/17 - Site Visit (IT: Ian) [Hinsdale Public Library] MobileCirc setup

7/18 - Site Visit (Adm: Aaron, Dawne) [Crestwood Public Library]

7/18 - Site Visit (IT: Ian) [Maywood Public Library] Sonicwall troubleshooting

7/23 - WorkFlows Circulation Interview at Itasca Public Library (UX: Crystal, Tara)

7/25 - Discovery and User Experience (DUX) Meeting (UX: Tara-chair, Robin, Lauren, Crystal, IT: Michael)

7/26 - Site Visit (IT: Vickie) [Cicero Public Library] circ and billing questions

7/30 - Site Visit (IT: Ian) [Hinsdale Public Library] MobileCirc setup

7/30 - BLUEcloud Kids webinar (Tara, Aaron, Dawne) feel free to remove this

8/1 - Site Visit (IT: Michael) [Bensenville Community Public Library] MobileCirc setup

8/2 - Site Visit (IT: Rudy) [Richton Park Public Library] Sonicwall installation

8/14 - Clarity Task Force (Adm: Aaron, Dawne, Bib Srvc: Scott, IT: Steven, UX: Tara)

8/15 - Site Visit (IT: Vickie) [National University of Health Sciences] inventory

7 SIRSIDYNIX SUPPORT & CONSULTING (AND RELATED)

SWAN holds monthly meetings with SirsiDynix consulting, called Sure Sailing.

- 5/22 – BLUEcloud Mobile Consulting with SirsiDynix (UX: Tara, Robin, Lauren)
- 5/22 – eResource Central Consulting with SirsiDynix (UX: Tara, Robin, Adm: Dawne)
- 5/29 – BLUEcloud Mobile Consulting with SirsiDynix (UX: Tara, Lauren, Adm: Dawne)
- 6/14 — BLUEcloud Staff Client Consulting with SirsiDynix (UX: Tara, Crystal, Bib Srvs: Scott, Sam, Claudia, Diane, IT: Steven, Rudy, Ian, Dave, Michael, Vickie, Adm: Dawne)
- 6/14 – Sure Sailing Call (SWAN staff from all departments participate)
    - Review removal of agency codes for Brookfield Zoo and Frankfort Bookmobile
    - Determining best method of deleting uneditable MARC tags (001, 003, 902, etc)
    - Creating new format policies
    - Discuss challenge of control number matching and book sets
    - Indexing settings when date fields are updated
    - Review processing and behavior of Onshelf Items Reports
    - Discussion on OpenSearch
- 7/11 - SirsyDynix BLUEcloud Acquisitions Pilot Kick-Off Meeting (Adm: Dawne, Bib Srvs: Scott, Claudia, IT: Vickie, Steven, Dave; La Grange Public Library, St. Charles Public Library)
- 7/12 - Sure Sailing Call (SWAN staff from all departments participate)
    - Outreach templates
    - Enterprise eRC resource checkout options labeling
    - Tools/community resources for managing bib data export to database
    - Holds Management review
    - SWAN development work review (In Transit label version 2, SendGrid email delivery verification)
- 7/23 – OCLC WorldCat API Meeting (IT: Steven, Rudy, Dave, Bib Srvs: Scott, Adm: Aaron, Dawne)
- 7/30 – SirsiDynix BLUEcloud Kids webinar (UX: Tara, Adm: Aaron, Dawne)
- 8/9 - Sure Sailing Call (SWAN staff from all departments participate)
    - Log review of Checkin/Discharge and Fine Free Discharge – discussion of how best to handle amnesty periods
    - Synonym List review for Enterprise
    - Incorporation of Google Analytics into BLUEcloud Analytics
    - Public note display options in Enterprise
    - Searching and Truncation
    - Standard number matching algorithms and role of alphabetic characters
    - Holds report matching pick-up library with item library where items are on shelf

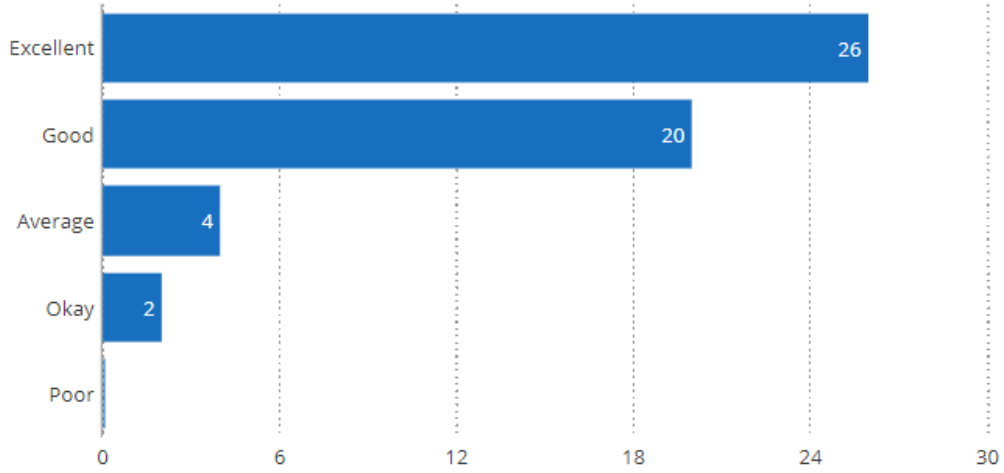
SWAN Expo 2019 Report

The Purpose and Vision of SWAN Expo

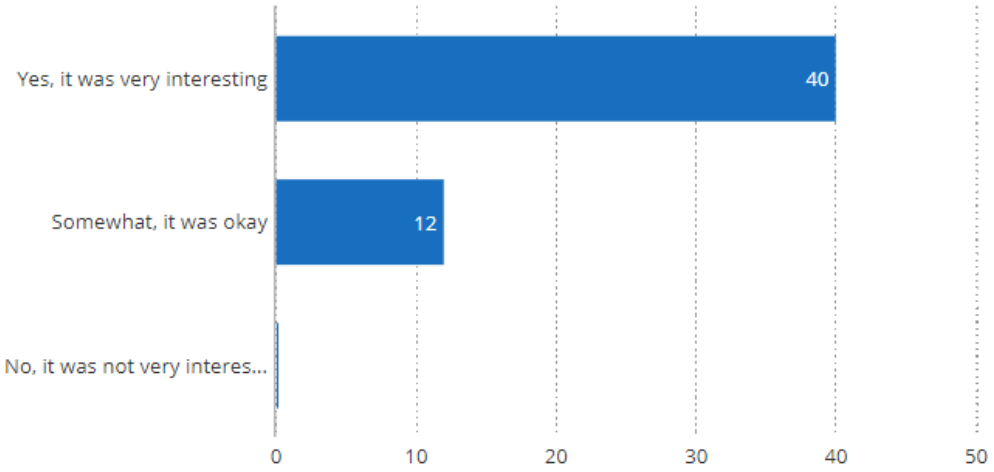
To create a gathering for the SWAN Membership and friends sharing expertise and big ideas, striving to bring best practices back to our colleagues.

Post Event Feedback

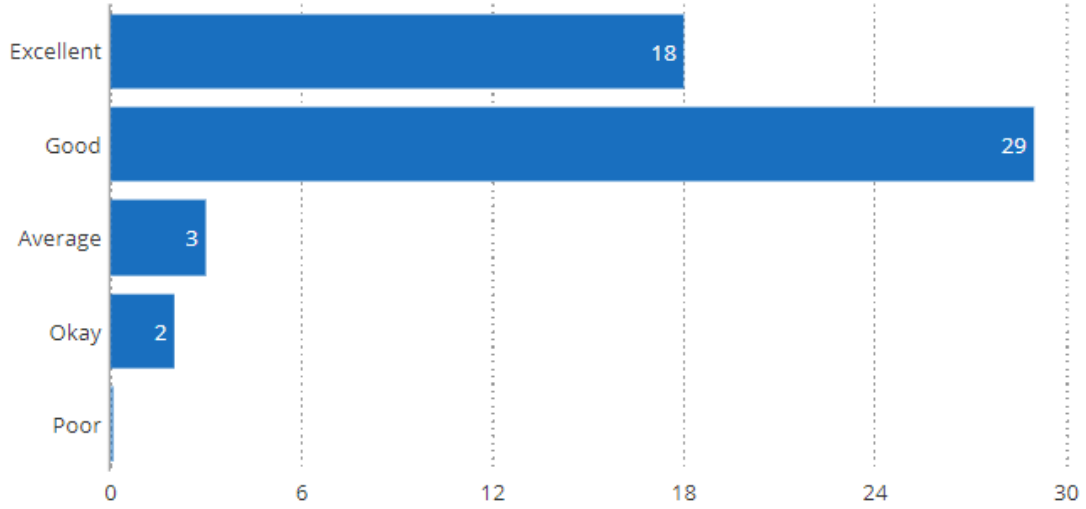
How would you rate the event's keynote speaker, John Chrastka, EveryLibrary, "What They Hear is What They'll Fund"



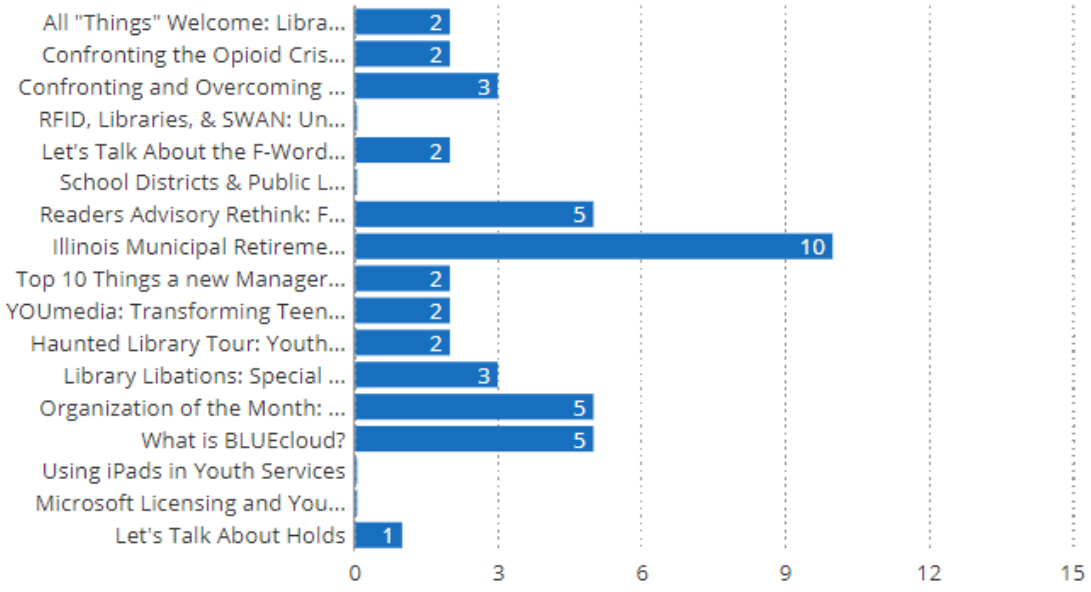
Did you find the keynote speaker's topic valuable?



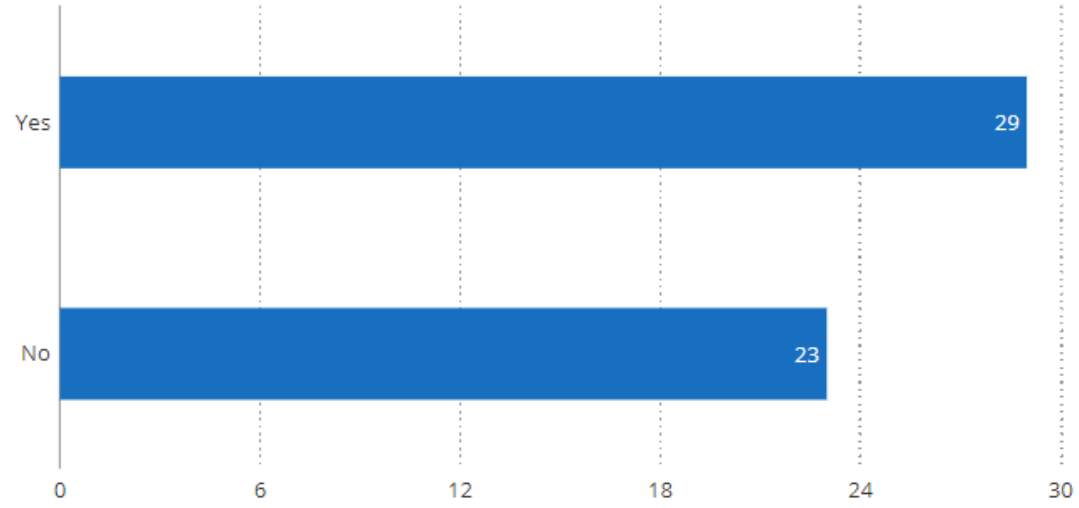
How would you rate the quality of the session topics available?



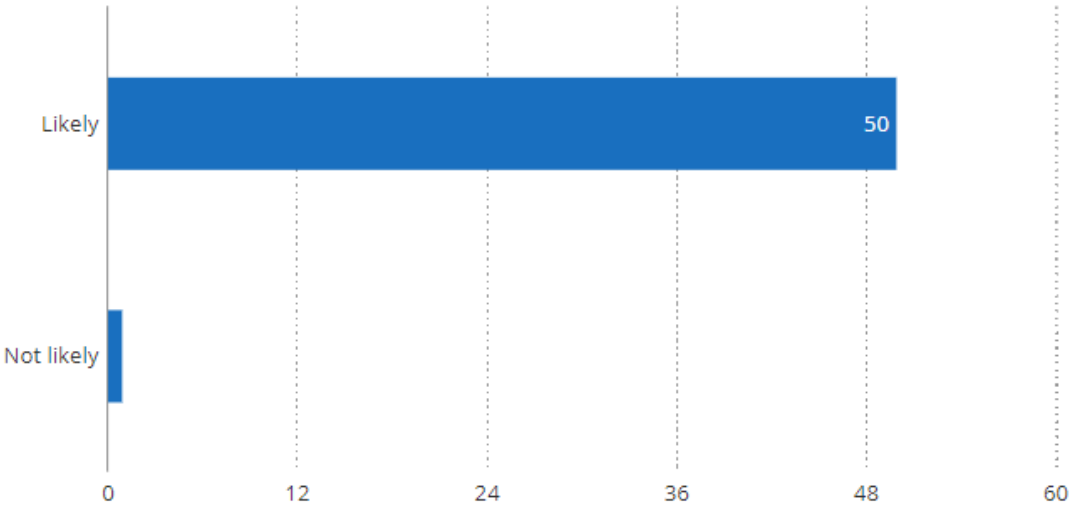
Which was your favorite session?



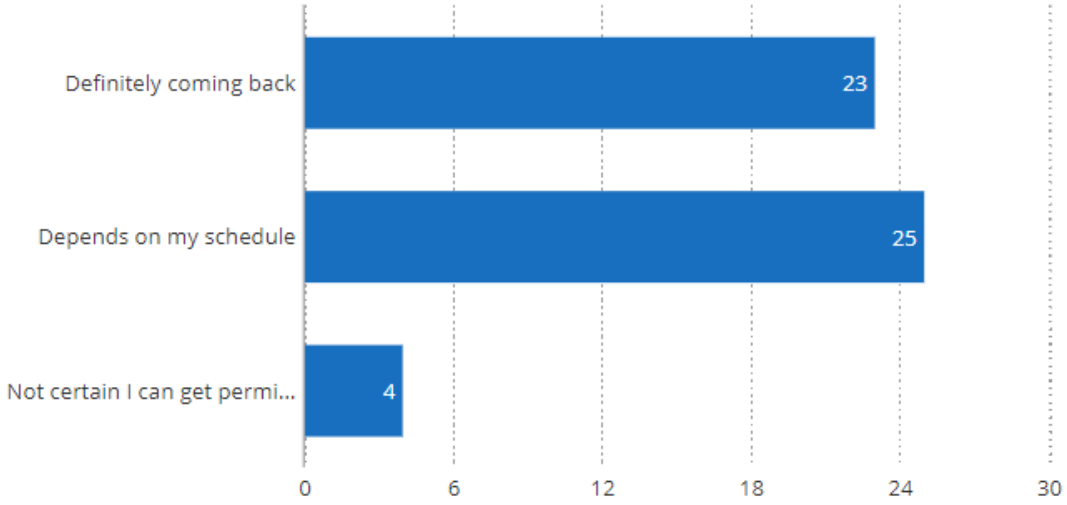
Did you make a contact with a library colleague that you will reach out to in the future?



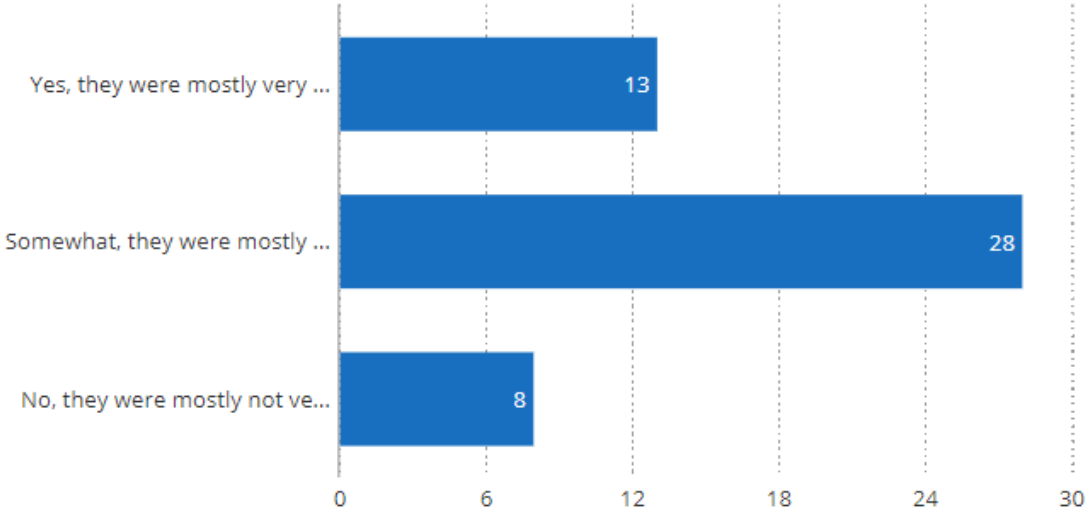
How likely are you to encourage colleagues next year?



How likely are you to attend next year?



Did you find the vendor tables interesting?



Feedback from Library Staff

If you can tell us what you enjoyed about the event, or what you learned that you valued, we would appreciate quoting you.

"The SWAN Expo was GREAT! Many thanks to you and your staff for putting together such a professional one day conference. I'm definitely looking forward to next year!"

"I learned a bit from every session, things that I can and will implement..."

"An excellent event for staff in-service days."

"Friendly SWAN staff, knowledgeable presenters and interesting keynote speaker."

"I always look forward to SWANx - it's such a great way to meet the people behind and in SWAN, and the energy is always fantastic!"

"I did enjoy the session topics more this year than years past that I've attended."

"I liked that it was casual and in a cozier venue. A great way to connect with new and existing colleagues, learn more about libraries, and enhance on your own skills."

"In an age where libraries are frequently devalued, John Chrastka steered the conversation toward the "transformational force" of libraries and the responsibilities we hold as librarians. Chrastka's belief in the role of libraries in our nation's future was fuel for me to reach more patrons."

"This is a great (and economical) program that provides any and all Swan members with an opportunity to learn more about what other members are doing - gaining insight and knowledge of current ideas and library trends! All that, and the lunch was very good!"

"This was my first year attending and I hope to keep going because I learned some interesting things. I really enjoyed hearing other libraries' feedback about their libraries."

If you were not able to attend this year's event, would you like to share why, and any feedback you might have for making next year's event easier to attend?

"I did not attend because there were not enough sessions with topics I was interested in so I could justify taking a day off work."

"Not able to go due to vacation."

"The date conflicts with another event I attend."

"I'm sure it's difficult to find a location that can accommodate such a large group, but if it's ever possible to rotate locations that would be appreciated. Due to some traffic problems, it took some staff 3 hours to get home this year."

"This is back-to-school event time for our area -- we had staff attending events at the grade schools and at one of the high schools..."

“This was our first week of school for the 2019/2020 school year. We cannot be out of our building the first few weeks. Also, last year it was the week before school started and we were all busy preparing for the school year.”

Any suggestions of how we can facilitate better networking for next year?

"A Solution Wall: create a pass-it-forward note board. Attendees can quickly write down their contact information with insight into their professional roles and pin these to a designated wall. Fellow attendees can grab notes as they see fit and connect over how they can help them achieve professional success. This professional networking activity is perhaps most useful for attendees experiencing similar industry pain-points, while offering others the opportunity to share solutions and products in an innovative fashion.”

Source: https://blog.bizzabo.com/encourage-event-attendee-networking-tips#6"

“How about some "round table" discussion groups as an option for one of the sessions? I find that when people sit around a table to talk, it is easier to connect and learn names.”

“ILA has a new "buddy system" this year for people attending alone. Something like that would be interesting.”

“I'm not that much of a networker. . .”

"It would be nice to see some of the regional groups like AVID or LACONI have a table at SWANx, to give people a face and some context for what those groups offer.

https://www.railslibraries.info/community/groups/audiovisual-information-discussion-group

or maybe a lighting session where RAILS groups introduce what they are about and the networking possibilities"

“Lunch was unstructured, which was nice but did not provide an opportunity to mingle. Maybe a presentation that involves the audience at lunch?”

“Make the scavenger hunt require networking instead of visiting vendors.”

“Maybe an interactive session (not sure if there was one!) but something hands on, crafty. Reaching Forward has done this and it has been very popular. We have a lot of crafty librarians, I'm sure there are more than just a few in the consortium who would be interested in running this.”

“Maybe offer some type of small group/table talks for people in different positions to get advice/ask for help.”

“Moraine Valley Community College is a GREAT venue. Perhaps also schedule Expo alternating years at the College of Du Page?”

“Not sure how. Our library only sent 2 people but staff that came from libraries that are able to send more than a couple people all sit together. We did chat with others at our table and everyone is friendly.”

"Offer an option, maybe during lunch, for people to group together informally based on special projects their library is doing."

"Get volunteers ahead of time, and set aside some tables with signs saying ""sit here if you want to talk about .... (outreach to seniors, strategic planning, loaning hot spots, staff appreciation, etc) """

Statistics

Total Attendees: 261

Libraries Represented: 57

List of Libraries

1. Acorn Public Library District
2. Alsip Merrionette Park Public Library District
3. Bartlett Public Library District
4. Batavia Public Library
5. Bedford Park Public Library
6. Bellwood Public Library
7. Bensenville Community Public Library
8. Berkeley Public Library
9. Berwyn Public Library
10. Bloomingdale Public Library
11. Blue Island Public Library
12. Brookfield Public Library
13. Carol Stream Public Library
14. Chicago Public Library
15. Chicago Ridge Public Library
16. Cicero Public Library
17. Clarendon Hills Public Library
18. Crestwood Public Library District
19. Crete Public Library District
20. Downers Grove Public Library
21. Eisenhower Public Library District
22. Elmwood Park Library
23. Flossmoor Public Library
24. Forest Park Public Library
25. Frankfort Public Library District
26. Geneva Public Library District
27. Glen Ellyn Public Library
28. Green Hills Public Library District
29. Hillside Public Library
30. Hodgkins Public Library
31. Indian Prairie Public Library District
32. Itasca Community Library
33. La Grange Park Public Library District

34. La Grange Public Library
35. Lyons Public Library
36. Maywood Public Library
37. Messenger Public Library
38. Midlothian Public Library
39. Oak Brook Public Library
40. Oak Lawn Public Library
41. Oak Park Public Library
42. Orland Park Public Library
43. Palos Heights Public Library
44. Park Forest Public Library
45. River Grove Public Library District
46. Riverside Public Library
47. St Charles Public Library
48. Summit Public Library District
49. Thomas Ford Memorial Library
50. Tinley Park Public Library
51. Town & Country Public Library
52. Villa Park Public Library
53. West Chicago Public Library District
54. Westchester Public Library
55. Westmont Public Library
56. Woodridge Public Library
57. Worth Public Library District

Event Budget

Annual Membership Event Budget: SWAN Expo 2019

Code	Budget Code Description	SWANx19 Revenue & Expenses	FY20 Estimate for SWANx19	FY20 Actual (Preliminary)
4070	**Reimbursements**	SWAN Libraries (EventBrite)	$6,090	$3,735
4070	**Reimbursements**	SWAN Libraries (Invoiced)		$3,043
4070	**Reimbursements**	Vendor Table Revenue	$2,400	$2,400
4050	**CE Grant**	RAILS CE Grant	$0	$0
	Subtotal Revenues		**$8,490**	**$9,178**
5110	**Print Materials**	Conference guidebooks	$536	$535
5250	**In-State Travel**	Reimbursements to staff & presenters	$150	
5280	**Conferences & Continuing Ed. Meetings**	Speaker Fees	$0	$0
5280	**Conferences & Continuing Ed. Meetings**	MVCC Facility Rental	$4,000	$4,000
5280	**Conferences & Continuing Ed. Meetings**	MVCC Catering	$5,756	$5,930
5320	**Office Supplies**	Giveaway Prize		$200
5320	**Office Supplies**	Supplies for Event		$719
5330	**Postage**	Postage	$0	$0
5510	**Misc Fee Expenses**	EventBrite Fees		$634
	Subtotal Expenses		**$10,442**	**$12,018**
		Net Profit/(Loss)	**($1,952)**	**($2,840)**