



**SWAN ADMINISTRATORS'
& DIRECTORS'
QUARTERLY MEETING**

Meeting Packet

September 3, 2020

10:00 A.M.



SWAN Administrators' & Directors' Quarterly Meeting

September 3, 2020

10:00 a.m. – 12:00 p.m.

Online Meeting (details below)

Per Illinois Public Act 101-0640, this meeting will be held by remote attendance

Agenda

1. Call to order and welcome
2. Public comment
3. Introduction of new library directors
4. Action Item – Approval of the June 4, 2020 Quarterly meeting minutes (Exhibit pgs. 2-3)
5. Information Item –SWAN Board Appointment
6. Information Item – Aspen Discovery investigation update (Exhibit pgs. 4-16)
7. Information Item – BLUEcloud Acquisitions & rental collection update
8. Information Item – Update on EBSCO Group-purchase Implementation
9. Discussion Item – SWAN's 2020 strategic initiatives & goals (Exhibit pgs. 17-33)
10. Announcements and questions
11. Next meeting December 3, 2020

Meeting Information

The SWAN Quarterly meeting is an open meeting. Register in advance for the GoToMeeting Webinar and you will be sent details on how to join to the email address you provide.

<https://register.gotowebinar.com/register/7953200119477753099>

SWAN Administrators' Quarterly Meeting Minutes

June 4, 2020 10:00 a.m.

Meeting Held Virtually

1. Call to Order and Welcome

President Bodewes called the meeting to order at 10:03 a.m. Bussey, Jenkins, Milavec, Wagner and Wittmann were present to establish a quorum

2. Public Comment

No public comment

3. Introduction of Visitors

Rosie Williams-Baig – Nancy L. McConathy Public Library District

Dawn Sterning – Prairie State College Library

4. Action Item - Approval of the March 5, 2020 Quarterly Meeting Minutes

Natalie Starosta (NRS) moved to approve the March 2020 Quarterly meeting minutes, seconded by Tiffany Verzani (EPS). Motion carried by unanimous voice vote.

5. Information Item – 2020 SWAN Board Election Results

Jennifer Cottrill, Library Director at Midlothian Public Library has joined the SWAN Board. Ted Bodewes was re-elected as President.

6. Discussion Item – Libraries providing curbside service

Skog briefly discussed the PPE supply orders and the continuation through June, as well as the Amazon opportunity. The number of libraries offering curbside service and libraries using the curbside communicator was discussed.

Tortorella outlined the Materials Quarantine Information given by RAILS and how this will be in effect when Resource Sharing is turned back on. Skog explained the Full delivery & quarantine formula. Skog asked for input amongst the members on how they feel about receiving delivery again by RAILS as well as their quarantine process.

7. Discussion Item – Libraries providing door side/home delivery

Skog asked for feedback from 2 library directors that are providing curbside pickup. Fidencio Marbella (Westchester Public Library) shared how it has been going. Very positive with their patrons. Sue Quinn (River Forest Public Library) shared her process as well. Some other members continued the discussion with curbside deliveries, curbside communicator, etc. Steven Schlewitt (SWAN IT Manager) discussed Curbside Communicator and some of the delays between the communicator (the Bot part) and patrons. He gave me some explanations and help with the communicator as it continues for libraries.

8. Discussion Item – Libraries reopening facilities to the public (open stacks, computer access, etc.)

Skog asked some Directors to discuss their library reopening and the process involved. Computer access, hot spots, cleaning, sanitizing & libraries processes were discussed.

9. Information Item – Update on EBSCO Group-purchase implementation

Robin Hofstetter gave some updates on EBSCO group purchase.

10. Announcements and Questions

3 new libraries added to SWAN. SWAN staff will be working on the addition over the summer/fall.

A question in regard to school lunch program was discussed.

11. Next meeting September 3, 2020

Motion to adjourn

Adjournment: 11:45 a.m.

Minutes Prepared by Ginny Blake

Respectfully Submitted,

SWAN Search Relevance Activity Results

July 2020

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Summary

SWAN is currently in an exploratory research phase to identify potential replacements for our discovery platform. SWAN staff working with ByWater Solutions have implemented a test installation of the Aspen Discovery platform to further evaluate this platform. In the July 2020 meeting of the Discovery and User Experience Advisory Group (DUX), participants conducted side-by-side comparisons of keyword searches in both platforms. The results of this activity showed that Aspen offers improved relevancy and search precision over Enterprise.

Methods

Search relevancy activity

Members of the Discovery and User Experience Advisory Group, joined by several members of the Cataloging Advisory Group, completed keyword searches in both the SWAN Aspen test instance and the SWAN Enterprise consortia-wide catalog, acting as an assigned patron persona.

Both catalogs did not include e-resources, so searches were limited to physical items only. To measure relevancy of known item searches, participants recorded the position of the record on the search results screen. To measure the precision of search results, or the number of relevant results for a given search term, participants recorded the number of relevant results on the first page of results.

Results analysis

Scott Brandwein, Bibliographic Services Manager, and Tara Wood, User Experience Manager, compiled the results using the methods and evaluation tool outlined in the article “Testing Search for Relevancy and Precision” (Ferrara, 2009).ⁱ

All search terms were analyzed in the precision analysis; only known item searches were analyzed in the relevancy analysis.

For the relevancy analysis, the record position noted in the participant worksheets was input into the evaluation tool to produce relevancy scores, including the mean, median, and percentage of results in the top 5 and 10 results.

For the precision analysis, each of the first five results for each keyword received a score using the following scale:

- Relevant: The result is exactly right.
- Near: The result is not a perfect match, but it is clearly reasonable for it to be ranked highly.
- Misplaced: The result is relevant to the keyword, but it clearly shouldn't be ranked highly.
- Irrelevant: The result has no apparent relationship to the user's search.

This scale produced strict, loose, and permissive scores:

- Strict: Accept only the results ranked Relevant, for completely relevant.
- Loose: Accept both Relevant and Near results.
- Permissive: Accept Relevant, Near, and Misplaced results.

Results

Relevancy Test

Measure	Enterprise Score	Aspen Score
Mean	11.5	1.9
Median	2	1
Times below 1st	66.7%	39.4%
Times below 5th	25%	6.1%
Times below 10th	19.4%	0%

In the relevancy test, a lower score is desirable. A low score indicates that results are generally higher in the search results. Aspen significantly outperformed Enterprise in all metrics.

The large gap between the mean and median in Enterprise scores is a result of some scores being extremely low on the search results list – in one search, the item was 101 in the search results list.

Aspen offers two advantages over Enterprise that likely lead to these scores. First, Aspen groups multiple formats into one record, where Enterprise displays one record per format. Second, Aspen uses a relevancy boost in the search algorithm that factors in the number of items attached to the record, checkouts, and holds, surfacing more popular items to the top of results.

Precision Test

Measure	Enterprise Score	Aspen Score
Strict	52%	67%
Loose	62%	74%
Permissive	82%	87%

In the precision test, a higher score is desirable as it indicates a higher percentage of the first five results are related to the search term. Again, Aspen outperformed Enterprise in all metrics.

In this instance, Enterprise may have had an advantage over Aspen. Because Enterprise has more records, the top 5 results were sometimes for the same item in different formats, and all items would have received a designation of Relevant. Aspen might have listed the same item with all formats in the first record, and then several items after that that may have received a score of Near or Misplaced. Even with this in mind, Aspen produced more precise results.

Observations

Author searches

- Aspen was overall much better at author keyword searches. From KM, “Aspen shows the novels right away unlike Enterprise which shows other things related to John Grisham or DVDs/audiobooks.”

Format-specific issues

- Searches for “newsweek” in Aspen yielded the expected title as the first result. However, finding the most recent issue was more difficult – it is not currently possible to place a hold on a specific issue, which is one of our priority issues.
- In a search for “new switch games” with the intention of finding games for the Nintendo Switch, Enterprise outperformed Aspen with several results on the first page of results, and no relevant results on the first page of results for Aspen.

Reliance on filters and sorting in Enterprise without need to in Aspen

- From AS on “ladies detective agency” search in Enterprise: “Book 2 was difficult to find. I performed the search, decided to click on the series link which reperformed the search. Then I used the book format facet to narrow further. I found the title at the 29th position in large print.”
- From AS on “alexander hamilton biography” in Enterprise: “This search did not get to the Chernow title until #51 which is the audiobook. Limiting by book format facet did not improve the results. I then sorted by publication date newest first, and found the book title by Chernow at #54.”
- From DT on “pride and prejudice” in Enterprise: “Not on first page and can’t seem to limit to graphic novel; used new Genre heading to find it and it came in as 5th and 6th entries.”

Grouped records

- From DT on “steven spielberg” in Aspen: “I wish there was more clustering of some of the duplicate records.”
- From SB on “paddington movie” in Aspen: “Results 2-5 should be grouped.”
- From SB: “Evaluating these may be a little unfair to Aspen. In a couple of instances, where Enterprise may have produced 5 relevant results for a search, Aspen’s grouped records meant there were not enough completely relevant results to display, so it transitioned into less-

relevant results at an earlier point, lowering its score but actually providing a better experience.”

Relevancy vs. “intuitive” relevancy

In evaluating relevancy, there is sometimes a gap between results that are technically relevant to the search terms and results that are relevant to what a human using those terms might expect.

- From DT on “Malcolm Gladwell” in Enterprise: “Polish copy comes up first, then a redundant listing of titles in different formats. First page all relevant but I would consider only 5/12 unique – all others are same title.”
- From MK on “Percy Jackson”: “In Aspen, it looks like the results are kind of in series order, but book 5 is #3. Have to know the last book is #5. Enterprise is super unhelpful for this with the various DVD and graphic novel versions showing up before the books. Kevin [persona] isn’t searching through multiple pages.”
- From AR on “Steven King” in Enterprise: “Hanna doesn’t understand why there are no books by him on the first page!”
- From AR on “Steven Spielberg” in Enterprise: “All books on the first page of Enterprise! Oh well! Hanna isn’t sure if all of these movies are directed by Spielberg but only movies came up on the first page so she’s excited.”
- From Scott on “Stephen King”: On the first page of results, Enterprise returns exclusively results about Stephen King. Aspen returns exclusively results by Stephen King.
- From Scott: “Although both Enterprise and Aspen scored R’s across the board on searches like “Percy Jackson” and “Ladies Detective Agency”, Aspen tends to open with the first books in these series on the first page. Enterprise, on the other hand, relies heavily on date and presents much later books in the series and books about the series.
- From MK, a search for “gunpowder” with the intention of finding kids books about the invention of gunpowder yielded the expected results in Enterprise. In Aspen, the relevancy boost for popularity put movies and fiction with the word “gunpowder” in the title above the materials the searcher was looking for.

Record-specific

- From GD: “There’s some weirdness in Aspen here for the book: [Tentacles: the amazing world of octopus, squid, and their relatives](#) The availability widget shows checked out, but there’s plenty of copies available.”
- From AR on “Bardzo glodna gasienica”: “Why are there 4 different ones in Enterprise? Hanna [persona] doesn’t know what to request! (Thanks to my co-worker Izabel for quickly giving me this title when I asked!)” From SB in Aspen: “Only 1 of 4 records with this title are returned. Why?”

Synonyms

- From AR on “pride and prejudice comic”: “With comic as a search term, the results are muddled. But I (Ang) feel pretty sure that lots of patrons don’t know to call them graphic novels.”
- From JS, in a search for “Mumford and Sons” limited by Author which appears in the catalog as “Mumford & Sons”: “when I slowed my typing, I did like that Aspen suggested “Mumford & Sons (Musical Group)” for my search, whereas Enterprise did not. So, if I was slower, then Aspen

would have prevented me from making the mistake. (...) I'm disappointed that Aspen also does not search authority records. The same thing happened for a few other title and author searches. Maybe it doesn't affect or bother many people, but I find it incredibly frustrating the lack of... synonym capability?"

Enterprise quips

- Misspelling Steven Spielberg's name in a search produced more results for his movies than a search using the correct spelling.
- In a topic search for "tax deductions," Aspen included several titles to choose from while the first 4 results in Enterprise were different editions of the exact same title.

Known limitations

This activity only evaluated physical item results. The results of this same analysis comparing both catalogs with e-resources enabled may produce very different results, which would likely skew in favor of Aspen due to record grouping. At the time of this activity, e-resources were not yet enabled in the Aspen test instance, so a search comparison was not possible.

In addition, this activity only looked at keyword searches. While some participants experimented with using filters, these results were not included in the analysis. Ferrara notes in the comments of his article:

"Functional add-ons (narrower, broader, filters, similar, etc.) are often great additions to a search engine. But not always. They're sometimes implemented as technology crutches without regard to whether they solve any actual problems."

By limiting this analysis to keyword searches only, we were able to evaluate a baseline of relevancy. That said, the functionality of filters and add-ons need additional evaluation.

Conclusions

Relevancy in Enterprise has long been a source of frustration in the SWAN membership. These results show that Aspen may be able to offer an improved search experience that better surfaces the items that patrons and library staff expect to find in the catalog.

That said, this research is by no means conclusive. SWAN staff will continue to configure and improve our test installation of Aspen. In addition, we will conduct an additional relevancy analysis using popular search terms once e-resources have been integrated into our test instance. Research into relevancy in Aspen will also need to be weighed against additional factors and features before the membership decides to enter a pilot phase with Aspen.

Appendix 1: Search strings and scores

Relevancy Scores

Search string	Aspen Rank	Enterprise Rank
alexander hamilton	1	42
alexander hamilton biography	2	51
amoeba school	3	4
assassins creed pirates	1	4
Bardzo głodna gąsienica	1	1
girl dragon	1	8
graphic novel pride and prejudice	2	2
harry potter and the order of the phoenix	1	2
harry potter and the order of the phoenix blu ray	1	1
harry potter order of phoenix	1	2
harry potter phoenix	1	2
Jedi Fallen Order Xbox	1	1
Jennifer L. Holm	4	29
Jurassic World evolution	1	1
kate winslet harvey ketel (misspelled)	1	1
ladies detective agency	2	48
ladies detective agency 2	1	2
ladies detective agency 2 (large type)	1	3
ladies detective series	2	101
Lightning Thief	1	3
missing president grisham	NF	0
newsweek	1	22
newsweek 2020	1	1
newsweek magazine	1	NF
order of the phoenix	1	3
order of the phoenix blu-ray	2	1
paddington movie	2	NF
Percy Jackson	3	34
Pete the cat school shoes	1	1
pride and prejudice comic	4	3
pride and prejudice graphic novel	9	3
pride and prejudise graphic novel (misspelled)	3	2
pride prejudice comic book	6	2
pride prejudice graphic	2	2
Stardew Valley	1	1
Up	1	9

Aspen – Precision Scores

Search string	Result 1	Result 2	Result 3	Result 4	Result 5	Precision - strict	Precision - loose	Precision - permissive
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alexander hamilton	r	i	m	r	r	60%	60%	80%
alexander hamilton biography	r	r	r	r	r	100%	100%	100%
assassins creed pirates	r	m	m	m	m	20%	20%	100%
Bardzo głodna gąsienica	r					100%	100%	100%
catering laws	m	i	i	m	i	0%	0%	40%
cephalopods	r	r	r	r	r	100%	100%	100%
chicago bulls: a juvenile book	r	r	r	r	r	100%	100%	100%
graphic novel pride and prejudice	m	r	r	r	n	60%	80%	100%
grisham	r	r	r	r	r	100%	100%	100%
gunpowder	r	r	r	r	m	80%	80%	100%
harry potter and the order of the phoenix	r	r	r	m	m	60%	60%	100%
harry potter and the order of the phoenix blu ray	r	r	m	m	n	40%	60%	100%
harry potter order of phoenix	r	r	m	m	r	60%	60%	100%
harry potter phoenix	r	r	m	m	r	60%	60%	100%
Jedi Fallen Order Xbox	r	r				100%	100%	100%
jet skis	r	n	r	r	r	80%	100%	100%
John Grisham	r	r	r	r	r	100%	100%	100%
jurassic world evolution	r	m	n	m	n	20%	60%	100%
ladies detective agency	r	r	r	r	r	100%	100%	100%
ladies detective agency 2	r	r	i	r	r	80%	80%	80%
ladies detective series	r	r	r	r	r	100%	100%	100%
Lightning Thief	r	r	r	r	r	100%	100%	100%
malcolm gladwell	r	r	r	r	r	100%	100%	100%
missing president grisham	i	i	i	i	i	0%	0%	0%
Mumford and Sons	m	m	m	r	i	20%	20%	80%
new switch games	i	i	i	i	n	0%	20%	20%
newsweek	r	r	n	n	n	40%	100%	100%
newsweek 2020	r	i	i	i	i	20%	20%	20%
newsweek magazine	r	i	i	i	i	20%	20%	20%
order of the phoenix	r	r	m	m	r	60%	60%	100%
order of the phoenix blu-ray	m	r	n	n	n	20%	80%	100%
paddington movie	r	r	r	r	r	100%	100%	100%
percy jackson	r	r	r	r	r	100%	100%	100%
Pete the cat school shoes	r	r	n	r	r	80%	100%	100%
polish romance	i	r	r	r	r	80%	80%	80%
pride and prejudice	r	r	r	m	r	80%	80%	100%
pride and prejudice comic	m	m	i	r	i	20%	20%	60%

pride and prejudice graphic novel	r	n	m	r	n	40%	80%	100%
pride prejudice comic book	m	m	i	m	m	0%	0%	80%
spielberg	r	r	r	r	r	100%	100%	100%
Stardew Valley	r	r	n	n		50%	100%	100%
stephen king	r	r	r	r	m	80%	80%	100%
steven king (misspelled)	i	i	i	i	i	0%	0%	0%
Steven Spielberg	r	r	r	r	r	100%	100%	100%
steven spielberg director	r	r	r	r	r	100%	100%	100%
steven Spielberg movies	r	r	r	r	r	100%	100%	100%
tax deductions	r	r	r	r	r	100%	100%	100%
tony shalloub [misspelled]	r	r	r	r	r	100%	100%	100%
tv series doctors	n	i	i	m	i	0%	20%	40%
Wisconsin day trips	r	r	r	r	r	100%	100%	100%
stephen spielberg (misspelled)	r	r	r	r	r	100%	100%	100%
pride prejudice graphic girl dragon	m	r	r	i	r	60%	60%	80%
kate winslet harvey ketel	r					100%	100%	100%
Up	r	r	n	n	i	40%	80%	80%
amoeba school	r	r	r	n	i	60%	80%	80%
Jennifer L. Holm	r	r	r	r	i	80%	80%	80%
quick grill	r	r	r	r	r	100%	100%	100%

Enterprise – Precision Scores

Search String	Result 1	Result 2	Result 3	Result 4	Result 5	Precision - strict	Precision - loose	Precision - permissive
alexander hamilton	n	n	n	n	n	0.00%	100.00%	100.00%
alexander hamilton biography	r	i	m	r	r	60.00%	60.00%	80.00%
amoeba school	r	r	m	r		75.00%	75.00%	100.00%
assassins creed pirates	m	m	n	n	r	20.00%	60.00%	100.00%
Bardzo głodna gąsienica	r	r	r	r	i	80.00%	80.00%	80.00%
catering laws	m	i	i	i	i	0.00%	0.00%	20.00%
cephalopods	r	n	m	n	m	20.00%	60.00%	100.00%
chicago bulls: a juvenile book	r	r	r	r	r	100.00%	100.00%	100.00%
girl dragon	r	r	r	r	n	80.00%	100.00%	100.00%
graphic novel pride and prejudice	m	r	n	n	n	20.00%	80.00%	100.00%
grisham	m	m	m	m	m	0.00%	0.00%	100.00%
gunpowder	n	r	r	r	n	60.00%	100.00%	100.00%
harry potter and the order of the phoenix	r	r	r	r	r	100.00%	100.00%	100.00%

harry potter and the order of the phoenix blu ray	r	i	i	i	i	20.00%	20.00%	20.00%
harry potter order of phoenix	r	r	r	r	r	100.00%	100.00%	100.00%
harry potter phoenix	r	r	r	r	r	100.00%	100.00%	100.00%
Jedi Fallen Order Xbox	r	i	i			33.33%	33.33%	33.33%
Jennifer L. Holm	m	r	r	r	r	80.00%	80.00%	100.00%
jet skis	r	i	i	i	r	40.00%	40.00%	40.00%
John Grisham	m	m	m	m	m	0.00%	0.00%	100.00%
jurassic world evolution	r	r	m	m	n	40.00%	60.00%	100.00%
kate winslet harvey ketel	r					100.00%	100.00%	100.00%
ladies detective agency	r	r	r	r	r	100.00%	100.00%	100.00%
ladies detective agency 2	r	r	r	i	i	60.00%	60.00%	60.00%
ladies detective series	r	r	r	r	r	100.00%	100.00%	100.00%
Lightning Thief	m	m	r	r	r	60.00%	60.00%	100.00%
malcolm gladwell	r	r	r	r	r	100.00%	100.00%	100.00%
missing president grisham	i	i	i	i	i	0.00%	0.00%	0.00%
Mumford and Sons	m	m	i	r	i	20.00%	20.00%	60.00%
new switch games	r	r	r	i	i	60.00%	60.00%	60.00%
newsweek	m	m	m	m	m	0.00%	0.00%	100.00%
newsweek 2020	r	n	i	m	m	20.00%	40.00%	80.00%
newsweek magazine	i	i	i	i	i	0.00%	0.00%	0.00%
order of the phoenix	r	r	r	r	r	100.00%	100.00%	100.00%
order of the phoenix blu-ray	r					100.00%	100.00%	100.00%
paddington movie	m	m	m	m	m	0.00%	0.00%	100.00%
percy jackson	r	r	r	r	r	100.00%	100.00%	100.00%
Pete the cat school shoes	r	m	r	r	r	80.00%	80.00%	100.00%
polish romance	r	r	r	r	n	80.00%	100.00%	100.00%
pride and prejudice	r	r	r	n	r	80.00%	100.00%	100.00%
pride and prejudice comic	m	r	r	n	m	40.00%	60.00%	100.00%
pride and prejudise graphic novel (misspelled)	r	m	n	n	i	20.00%	60.00%	80.00%
pride prejudice comic book	r	r	n	r	n	60.00%	100.00%	100.00%
pride prejudice graphic	m	r	n	r	n	40.00%	80.00%	100.00%
quick grill	r	r	r	r	r	100.00%	100.00%	100.00%
spielberg	m	m	m	m	m	0.00%	0.00%	100.00%
Stardew Valley	r	r	r	i	n	60.00%	80.00%	80.00%
stephen king	r	r	r	r	r	100.00%	100.00%	100.00%
stephen spielberg (misspelled)	r	r	i	r	r	80.00%	80.00%	80.00%
steven king (misspelled)	i	i	i	i	i	0.00%	0.00%	0.00%
Steven Spielberg	m	m	m	m	m	0.00%	0.00%	100.00%

steven spielberg director	r	r	r	r	r	100.00%	100.00%	100.00%
steven Spielberg movies	i	i	i	i	i	0.00%	0.00%	0.00%
tax deductions	r	r	r	r	r	100.00%	100.00%	100.00%
tony shalloub [misspelled]	i	r	i	i	r	40.00%	40.00%	40.00%
tv series doctors	m	i	i	i	i	0.00%	0.00%	20.00%
Up	m	m	m	m	m	0.00%	0.00%	100.00%
Wisconsin day trips	r	r	r	r	r	100.00%	100.00%	100.00%

Appendix 2: Relevancy activity worksheet

YOUR NAME:

Instructions

In this activity, you will use your persona to conduct searches in Enterprise and Aspen and compare the relevancy of your results. As you work through the searches, internalize your persona and think about how they would search, what their interests are, and what they might like or dislike about the results they are seeing.

For the purposes of this activity, all searches will be **keyword searches** and they will fall into two categories: known item searches or author/topic searches. In a known item search, your persona is looking for a specific item and format. In an author/topic search, your persona is looking for something slightly broader and a few different items could meet their needs.

You will have prompts for the first few searches, and then you will choose your own adventure! Pick known items, topics, or authors of interest to your persona.

For each search:

1. Based on the item and the persona, select your keywords
2. Search in both Aspen and Enterprise using your keywords – having one in one tab and one in another is helpful
3. If this is a **known item search**
 - a. Record the **position** of the record on the search results screen (results are numbered).
 - b. For Aspen, record the grouped record position and for Enterprise record the item record position.
4. If this is an **author/topic search**:
 - a. Record the **number of relevant results** on the first page of search results.
 - b. For Aspen, count grouped records, for Enterprise count item records.
5. Finally, as your persona make any notes on what you liked, didn't like, found frustrating, etc.

Searches & Notes

Search 1 - Known Item, Movie

I'm looking for: Harry Potter and the Order of the Phoenix on BLU-RAY

Keywords:

Position in Results:

Aspen	Enterprise

Notes:

Search 2 – Author

I'm looking for: Books by Stephen King (Author/Topic)

Keywords:

Number of Relevant Results:

Aspen	Enterprise

Notes:

Search 3 – Known Item, Series

I'm looking for: Ladies Detective Agency- 2nd book in the series

Keywords:

Position in Results:

Aspen	Enterprise

Notes: I did find it in Enterprise when I searched for ladies detective agency 2

Search 4 – Known Item, Graphic Novel

I'm looking for: Pride and Prejudice graphic novel version

Keywords:

Position in Results:

Aspen	Enterprise

Notes:

Search 5 – Known Item, Popular and Missing Details

I'm looking for: A biography of Alexander Hamilton – that one that's really popular (you know it is by Ron Chernow but your persona doesn't).

Keywords:

Position in Results:

Aspen	Enterprise

Notes:

Search 6 – Known Item, Serial

I'm looking for: Newsweek most recent editions

Keywords:

Position in Results:

Aspen	Enterprise

Notes:

Search 7 - Author

I'm looking for: Find movies directed by Steven Spielberg using a keyword search (Author/Topic)

Keywords:

Number of Relevant Results

Aspen	Enterprise

Notes:

Now, do 4-5 more searches based on your persona. Be creative! Embrace your persona and think about what they are looking for and how they would search for it.

Search 8

I'm looking for:

Keywords:

Position in Results OR Number of Relevant Results

Aspen	Enterprise

Notes:

Search 9

I'm looking for:

Keywords:

Position in Results OR Number of Relevant Results

Aspen	Enterprise

Notes:

Search 10

I'm looking for:

Keywords:

Position in Results OR Number of Relevant Results

Aspen	Enterprise

Notes:

Search 11

I'm looking for:

Keywords:

Position in Results OR Number of Relevant Results

Aspen	Enterprise

Notes:

Search 12

I'm looking for:

Keywords:

Position in Results OR Number of Relevant Results

Aspen	Enterprise

Notes:

ⁱ Ferrara, John, et al. "Testing Search for Relevancy and Precision." A List Apart, 2 Apr. 2019, alistapart.com/article/testing-search-for-relevancy-and-precision/.

SWAN Tactical Plan

IN SUPPORT OF STRATEGIC PLAN FOR FISCAL YEARS 2020 &
2021

AARON SKOG, EXECUTIVE DIRECTOR, SWAN

Strategic Plan Objectives

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

Tactical Plan

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

April – June 2020

Recommend Replacement of Discovery Interface

Objective 1

Aaron Skog, Executive Director

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

Update: Expected Recommendation March 2021

The first phase of the SWAN Aspen Discovery project concluded August 2020. The next phase will take place from September 2020 through February 2021, with a final membership recommendation in March 2021.

Implement Parallel Discovery Platform

Objective 1

Tara Wood, User Experience Manager

The next version of SWAN's catalog will require setup in SWAN's Azure infrastructure and need to integrate with the Symphony ILS. The parallel discovery platform will need months of work ensuring the complex SWAN ebook requirements are working for each member library. This interface will be evaluated and tested with SWAN's bibliographic data and e-resources to ensure FRBRized format grouping assists library users in finding the precise format and owning library within SWAN.

Update: Goal Complete

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

Create, Recruit, and Hire Web Application Development Position

Objective 2

Aaron Skog, Executive Director

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

Update: On Hold

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

Create Structure/Procedures for Handling Libraries in Staff Furlough

Objective 1

Dawne Tortorella, Assistant Director

The global pandemic has led to many SWAN member libraries to take unprecedented steps in shutting down and furloughing library staff. This scenario has already occurred in April 2020 and requires SWAN to develop an approach for managing the library's online collection and suspended resource sharing.

Update: On Hold

The furloughing of library staff during the pandemic largely did not take place. However, we have seen an increase in staff turnover at member libraries. An additional goal "Training initiative for online self-paced training" was created to accommodate this observed need among member libraries.

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

Objective 1

Dawne Tortorella, Assistant Director

Clarity identified that the way libraries in the consortium handle new items creates friction among libraries who need local copies for home library patrons, and confusion in accurately explaining the hold queues. The March-April 2020 shutdown of SWAN's resource sharing presents a unique opportunity to revamp the resource sharing configuration in handling new items. SWAN will provide a recommendation for handling new materials within the consortium and create a set of benchmarks for reviewing and moving new items back into the generally available collection.

Update: Expected Completion in January 2021

Consistency and reduction in item types associated with new and special collections, representing book and audio-visual material types, is the first step in providing some uniform sharing practices. Expansion of reciprocity resource sharing group usage provides another tool in managing unique situations, both permanent and temporary, in the membership.

Hold SWAN Expo Web Series to Substitute 2020 Event

Objective 5

Dawne Tortorella, Assistant Director

Steven Schlewitt, IT & System Support Manager

The in-person event held at Moraine Valley Community College will be instead converted to a series of webinar sessions recruited from member library staff and SWAN staff.

Update: Goal Complete

The web series was held from April to June and recordings are posted online. Nine sessions were held from April-July, 2020. Outside speakers presented 3 sessions, SWAN staff 3 sessions, and SWAN member library staff 3 sessions for a balance of topics ranging from cataloging, collection development, technology, and virtual services during pandemic.

Develop Audio-Visual Item Type Recommendations for SWAN100

Objective 2

Samantha Dietel, Consultant, Bibliographic Services

Establish reduced standard set of audio-visual item types for new libraries joining SWAN. This work will serve as model and more uniform set of item types to drive circulation and holdability. This work will inform the Item Type Task Force as a model to expand.

Update: Goal Complete

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

Establish Uniform Parameters for Fine Free

Objective 2

Vickie Totton, Consultant, IT & Systems Support

Crystal Vela, Consultant, User Experience

Develop a uniform set of guidelines to provide a consistent staff and user experience in implementing fine free policies across the SWAN consortium. Provide a consultation service to review circulation rules, holdability, item types, user profiles, and bill forgiveness during the process of implementation for a library.

Update: Goal Complete

The guidelines are all posted on the SWAN Support site. In addition to guidelines established in early March, Fine Free For Now options were introduced during COVID-19 closures allowing libraries to quickly transition to temporary use for patron service.

Pilot BLUEcloud Acquisitions and Baker & Taylor Rental

Objective 2

Samantha Dietel, Consultant, Bibliographic Services

Scott Brandwein, Manager, Bibliographic Services

Implement BLUEcloud Acquisitions into SWAN's production BLUEcloud environment and implement a limited rental program with Baker & Taylor to target high demand holds introducing additional copies into circulation. This pilot is intended to test BLUEcloud Acquisitions in production, maintaining close working collaboration with SirsiDynix development team and a major SWAN library vendor. In addition, implementation of Baker & Taylor rentals provides a controlled test of introducing needed copies to meet high demand within the consortium.

Update: Underway

SWAN has a contact with Baker & Taylor for rental copies. The first order of rental items was placed in August 2020. The next order will be created and placed using BLUEcloud Acquisitions. Items selected are based on high demand holds and are immediately holdable for any patrons. These items will be continuously shared, with opportunities for testing roaming collections. When circulation demand ceases, the items will be returned to Baker & Taylor.

Continue BLUEcloud Staff Interface Pilot & Targeted Deployment

Objective 2

Samantha Dietel, Consultant, Bibliographic Services [Acquisitions]

Claudia Nickson, Consultant, Bibliographic Services [Cataloging]

Crystal Vela, Consultant, User Experience [Circulation]

Steven Schlewitt, IT & Systems Support Manager [Security & Account Deployment]

Maintain ongoing SharePoint project repository and active participation in SirsiDynix Strategic Partners Program (SPP), including staff from SWAN member libraries. Provide Member Update Sessions with new releases and assignments to member participants. Expand participation as product feasibility addresses niche services areas. Phase II pilot of Circulation targets public service staff.

Update: Underway & Ongoing

SWAN has an online portal for the libraries participating in the BLUEcloud pilot and two online meetings took place to provide updates. The SWAN pilot of BLUEcloud Staff has Eisenhower Public Library District using the BLUEcloud Circulation at its circulation desk by library staff. The Eisenhower pilot was on hold during the pandemic and is set to resume in September. Bibliographic Services expanded the initial pilot of BLUEcloud Cataloging during the pandemic in April 2020. SWAN continues to provide the SirsiDynix SPP updates with interface changes and member library requests/suggestions.

July – September 2020

Form Item Type Task Force (Clarity Recommendation)

Objective 1

Samantha Dietel, Consultant, Bibliographic Services

Clarity identified the need to consolidate Symphony Item Types. Several members of the Task Force have offered to participate and lead a new task force of library peers to review the current ILS configuration and provide guidance. This Item Type Task Force will call for library staff to self-nominate and commit to meeting monthly for an estimated 6 months.

Update: Ongoing

The decided approach during the pandemic will be to utilize Cataloging, Circulation, and DUX advisory groups to discuss SWAN's recommended Item Type configuration. This topic is a focal topic for FY '20, illustrating the interdependency between technical services, circulation, and the patron experience. The plan is to continuously work with libraries to move toward a more manageable set of item types which present a consistent experience to the patron. Advisory group work and library consultations will continue to evaluation and implement these changes.

Support & Promote the EBSCO Group-Purchase

Objective 2

Robin Hofstetter, Consultant - Electronic Resources, User Experience

Tara Wood, User Experience Manager

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

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

Update

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

Form Governance Study Committee

Objective 3

Aaron Skog, Executive Director

Ted Bodewes, Board President

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

Update: On Hold

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

Create Net Promoter Score Survey

Objective 1

Aaron Skog, Executive Director

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

Update: Underway

HR Source has been contracted to work with SWAN on the survey. The survey will be developed and issued in October 2020.

Continue to Improve Patron Data & ILS Platform Security

Objective 2

Steven Schlewitt, IT & System Support Manager

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

Update: Ongoing

Vendors offering 3rd party integration are required to sign a Vendor Access Policy which outlines privacy, security, and connectivity requirements. New vendors are provided with secure access through web services which includes support from SWAN development staff in access data securely. Recent vendors

integrations include Plymouth Rocket, MeeScan, and Patron Point. Work continues with e-Book and e-streaming services to migrate from SIP2 to web services.

Continue to Improve ILS Platform System Reliability

Objective 2

Steven Schlewitt, IT & System Support Manager

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

Update: Ongoing

COVID-19 redirected IT and Systems Support efforts to managing changing ILS configurations, reports, and policies. Planned disaster recovery drill has been postponed until after SWAN100 project.

Infrastructure fail-over network enhancements were operationalized in response to the August storm which impacted SWAN headquarters enabling additional service support migrating to the cloud infrastructure established in 2018.

Add Three Libraries to SWAN – SWAN100 Project

Objective 2

Dawne Tortorella, Assistant Director

Scott Brandwein, Bibliographic Services Manager

Steven Schlewitt, IT & System Support Manager

Samantha Dietel, Consultant, Bibliographic Services

The public libraries Glenside, Roselle, and Warrenville will need membership approval for admission in June 2020. The project will be funded by RAILS Catalog Grants to cover one-time costs. The go-live of the libraries is expected in the first week of December 2020. “Project SWAN100” (the number of total libraries SWAN will have afterwards) will include profiling of circulation and bibliographic data mapping, bibliographic, patron, and circulation data migration, and training for new members.

Update: Underway

This project is expected to be completed December 2020. The mapping of data is complete, and the SWAN Symphony Test server has been loaded with data from the three libraries. Mapping of item types which drive circulation and holdability follow consolidated recommendations as prioritized by the Clarity Task Force. This group of libraries will serve as configuration models for other libraries moving to a more streamlined use of policies.

These libraries will be the first in SWAN to use BLUEcloud Acquisitions in production. They will also be testing use of BLUEcloud Cataloging for pre-cat cataloging work.

Build “Your Library Statistics” Monthly Report

Objective 2

Dawne Tortorella, Assistant Director

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

Update: Now Running

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

Expand Patron Driven Acquisitions AV Experiment

Objective 4

Scott Brandwein, Bibliographic Services Manager

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

Form School & Public Library Task Force

Objective 2

Dawne Tortorella, Assistant Director

Tara Wood, User Experience Manager

SWAN public libraries have long developed and supported collaboration with public and private schools in their service area. The challenges of these times call upon expanding this collaboration. SWAN’s public libraries have increased access to electronic resources through virtual programming, and the group licensing of EBSCO research databases has increased access to electronic resources and

opportunities exist to leverage the SWAN resource sharing consortium to extend virtual access for children and students.

October – December 2020

Provide Recommendation on Marketing Automation Platform for Libraries

Objective 2

Aaron Skog, Executive Director

The COVID-19 pandemic has revealed a deep need for SWAN member libraries to have a set of tools for digital marketing directly with library patrons that goes beyond a weekly newsletter. The SirsiDynix Community Engagement Platform is a new component of the SirsiDynix Library Services Platform. Patron Point is another service with wide adoption, including the CLEVNET library consortium.

Update: Whitepaper for December Quarterly

Aaron has received demonstrations and interviewed customers of Patron Point and OrangeBoy Savannah. Also included in demonstrations is the just released SirsiDynix CEP, and the OCLC Wise platform.

Training initiative for online self-paced training

Objective 1

Claudia Nickson, Bibliographic Services Consultant

Crystal Vela, User Experience Consultant

Dawne Tortorella, Assistant Director

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

Update: Underway

SWAN now has a subscription to the software platform Articulate 360 which includes tools for rapid course development in a responsive format, allowing staff to review training on desktop, tablet, or mobile device. Style guide and templates for consistent learning experience are being created. Three courses are currently in development with a targeted delivery Fall 2020.

January – March 2021

Replace SWAN Automated Voice Notification

Objective 2

Steven Schlewitt, IT Manager

SirsiDynix Voice Automation (known as SVA) is due for server replacement. The system resides in the RAILS datacenter. The Operational Think Tank recommendations an ILS audit will inform areas for improvement within SWAN's voice notification system. SWAN should consider 3rd party solutions outside of the ILS vendor, as the system selected should ideally stand in front of any ILS SWAN choses.

April – June 2021

Migrate RAILS Hosted Servers to SWAN Infrastructure

Objective 2

Steven Schlewitt, IT & System Support Manager

The RAILS FY21 funding grant requires SWAN to transition its ticketing system, support site, and single-sign-on service out of the RAILS network and into SWAN's Azure infrastructure by June 30, 2021.

Long Range Plan (2021-2023)

Objective 1: Long Range Plan

Incorporate Patron Experience Within

Research and performance enhancements SWAN completed within Objective 1 should not lose sight of finding ways to improve the patron experience as part of objective 4.

Objective 2: Long Range Plan

Staffing for Research & Development

Following the marker in this objective of finding solutions and “emphasizing ones that are most under SWAN control,” we will dedicate more staff time towards software development. Recent success in this area has allowed SWAN to provide solutions that are not native to the ILS or catalog. The SWAN patron lookup webpage and the automated delivery label are examples of how we can create solutions using our proprietary vendor’s tools.

Build Web Interface for Library Self-Check System

Building on the success of the custom Online Patron Registration interface which integrates with the SirsiDynix Web Services and Symphony ILS, SWAN would like to provide member libraries a web-application that could serve as low-cost self-check system.

Objective 5: Long Range Plan

Fund Membership Ideas & Initiatives

Use the objective 6 funds to create a “Shark Tank” for member library staff ideas that require funding and benefit the SWAN community. These could entail regional programs for patrons in areas of technology that match the SWAN needs in Objective 1 and Objective 2.

Objective 6: Long Range Plan

Seek Out Alternative Funding or Grants

This Objective 6 is dependent on Objective 3’s goal of SWAN becoming a 501c3. SWAN will continue to utilize grants to help with funding projects and operations. SWAN will need to structure budget funds based on 501c3 determination to segregate operations, grants, reserves, and capital plans.

Completed Goals

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

Form Operational Think Tank, AKA Clarity Task Force

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

Create a Curriculum of Training for Library Staff

SWAN created a curriculum of training for member library staff and provided these classes as ongoing online or in-person events. Courses

Conduct ILS Processing Inefficiencies Evaluation

The Symphony ILS configuration was reviewed for holds management, lending, and record loading within the Acquisitions workflow. A key step will be documenting internally SWAN's configuration and procedures.

Create More Online Documentation

The SWAN support website relaunched in December 2018 and staff continued focus on writing documentation for library staff.

Assess the Discovery Platform for SWAN & Provide Recommendation

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

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

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

Complete Infrastructure Migration

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

Membership Implementation Schedule

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

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

Offer Library Patrons Mobile Application through BLUEcloud Mobile

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

Create New OCLC Holdings Update Process for SWAN: OHM

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

Study & Offer E-Content Consortia Purchases

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

Evaluate BLUEcloud Staff Interface

Perform research/evaluation/usability testing on the new web-based interface BLUEcloud Staff which will replace the Java based client WorkFlows. Phase I evaluation includes Cataloging and Circulation. SWAN libraries (La Grange, St. Charles, SWAN headquarters) also participated in a controlled Phase III

Pilot of BLUEcloud Acquisitions under the direction of SirsiDynix. All participants in pilot activities are also engaged in SirsiDynix Strategic Partners Program (SPP) feedback and activities.

Perform an Assessment of BLUEcloud Acquisitions

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

Automated Delivery In-Transit Label

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

Negotiate Extension of SirsiDynix Agreement

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

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

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

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

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

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

Negotiate Long Term Agreements with EBSCO & OCLC

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

Determine Community Driven Software Initiatives within FY21 Operations Budget

Staff positions were either unfilled or eliminated in order to support moving forward with a Web Application Developer to be hired on staff by SWAN.

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

Evaluate Organization Legal Entity

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

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

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

Revise SWAN Budget Structure

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

Objective 4: Increase Presence of Patron Experience

Develop & Deploy Online Patron Registration

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

Develop & Incorporate Patron Help into Public Catalog

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

Objective 5: Strengthen the Collective Identity

Pilot Online Membership Forums

The SWAN Community Forums was rolled out over the past year and is now available for all SWAN user groups.

Plan SWANx19 Event

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

Clarify Role of SWAN Advisory & User Groups

SWAN provides library staff networking and advisory opportunities. The role of these should be clarified for the membership in 2019. Any changes will be incorporated into the 2020 calendar year schedule.

Refer to the User Groups detailed on the SWAN Support site:

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