




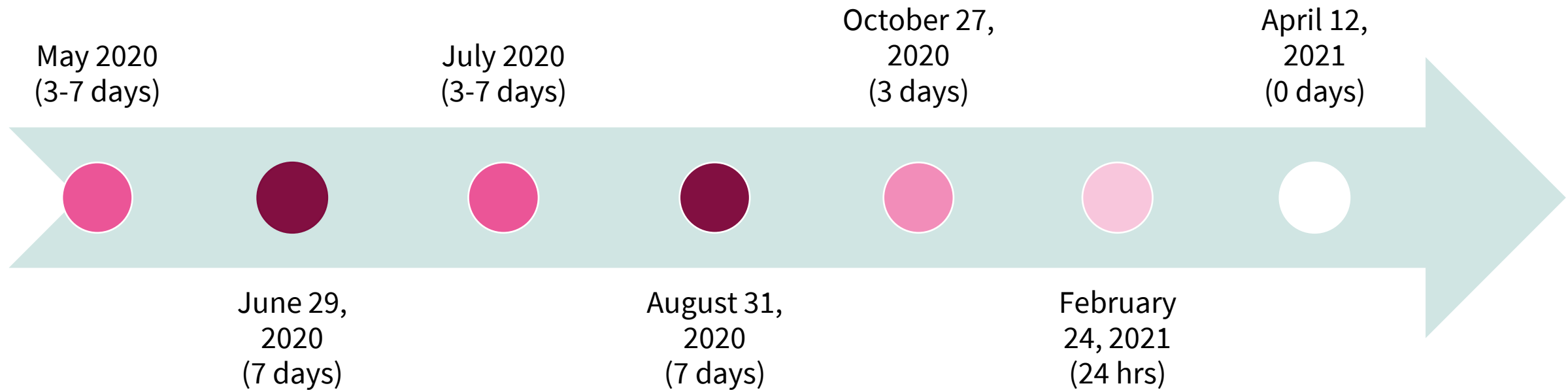
SWAN Fireside Chat

April 27, 2021

Agenda

- Quarantine & grace period reset
 - Fine Free decisions and numbers
 - Processing fee
 - URLs in notices
 - Locker & drive-up pickup options (pseudo libraries)
 - Patron record purge & NCOA
 - Explore More Illinois
 - Dialer pilot
 - Support site & OTRS migration
 - Interactive trainings for staff
 - E-resources updates
 - Statistics
 - Upcoming Events & Meetings
- 
- A teal-colored triangle is located in the bottom right corner of the slide, pointing towards the top right.

RAILS Quarantine Timeline




Conclusion <https://www.cdc.gov/coronavirus/2019-ncov/more/science-and-research/surface-transmission.html>

People can be infected with SARS-CoV-2 through contact with surfaces. However, based on available epidemiological data and studies of environmental transmission factors, surface transmission is not the main route by which SARS-CoV-2 spreads, and the risk is considered to be low. The principal mode by which people are infected with SARS-CoV-2 is through [exposure to respiratory droplets carrying infectious virus](#).

Grace Period

Modified in October, 2020 to match quarantine periods

- Fine accrual delayed for 7 days
 - 0 day grace, delayed 7 days
 - 3 day grace, delayed 8 days
- System-wide global change will be reset to pre-covid 0 days/3 days grace on June 1st



June 1, 2021

Return to normal
grace period and
fine accrual

Polls – Quarantine, Library Hours, Curbside

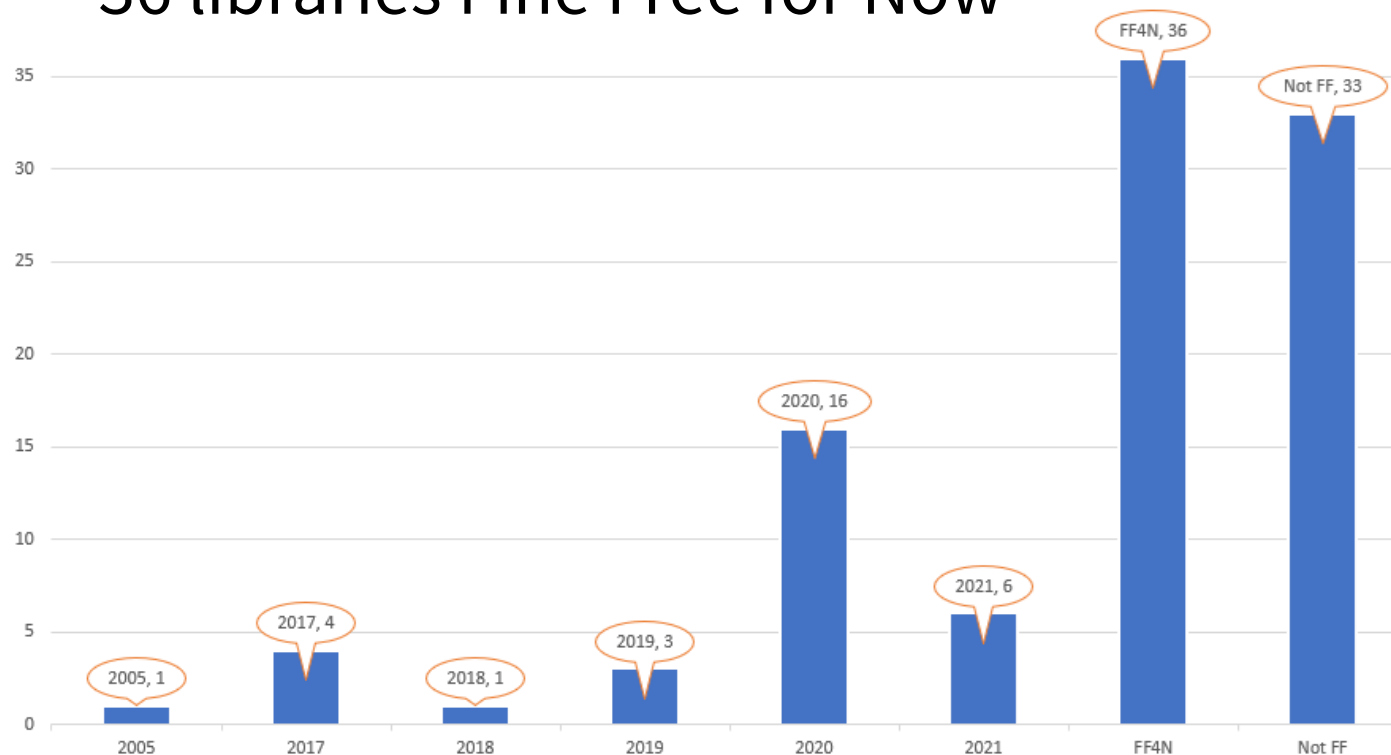
What's happening at your library? Get ready for some polling questions.

1. As of May 1, how long does your library quarantine?
2. Has your library made permanent shifts in hours of operation?
3. When does your library plan to return to pre-covid hours?
4. How have you transitioned curbside service?



Fine Free Decisions & Numbers

- 31 libraries Fine Free
- 36 libraries Fine Free for Now



April 27, 2021

SWAN Library Services

September 1, 2021

Return to pre-covid
circ rules, or fine free
permanently

Fine Free Observations

When libraries move to a fine free circulation policy, the following has been noted:

- General behavior on returning items does not change; people return items when they have finished reading/viewing.
- Return of long overdue items without assessing fines, does result in more items returned when patron is not responsible for overdue fines.
- Patrons may decide to use a neighboring library due to that library's fine free policy, but these numbers are low. Most patrons continue to use the library which is most convenient and for reasons other than fines.
- Reciprocal borrowers are no more likely in accumulating overdue items than home patrons.

Fine Free – Working with neighbors

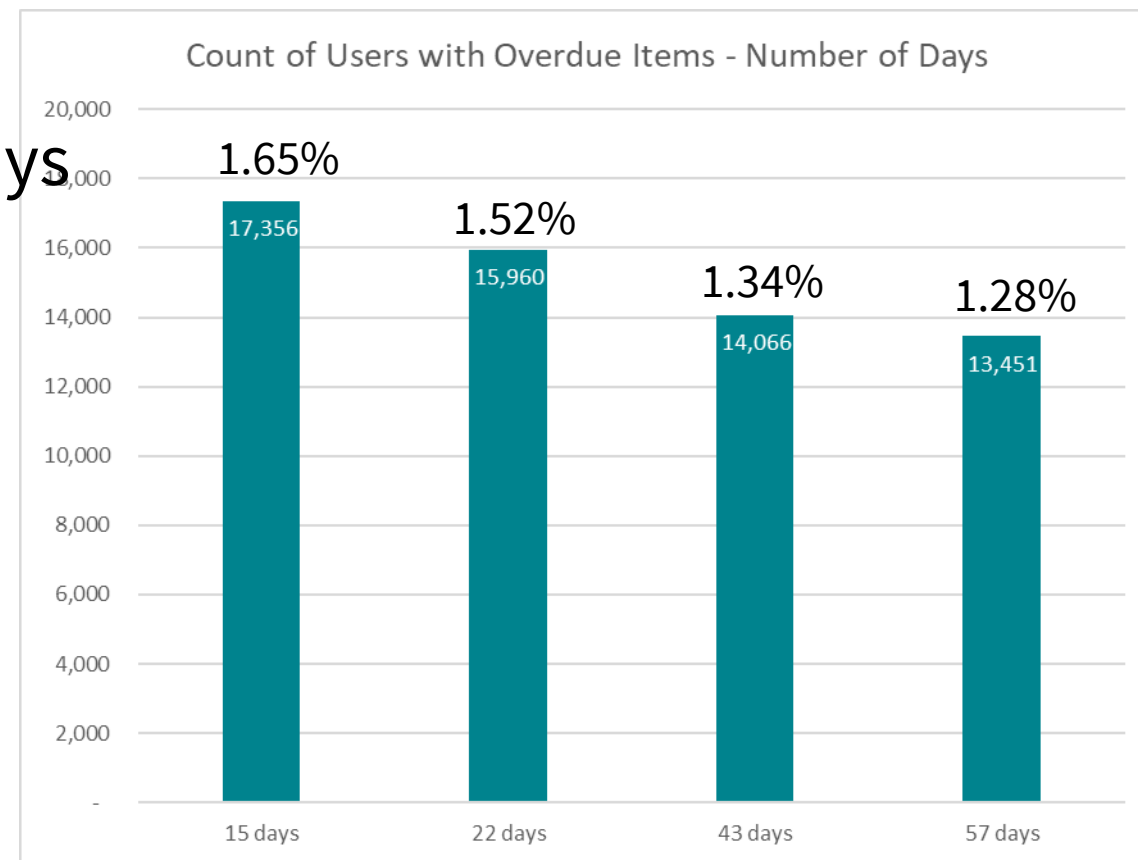
- Fine free libraries are concerned about the incentive (or disincentive) to return items:
 - Block patrons if they reach an overdue item threshold -AND/OR-
 - Block patrons when they have any item overdue for more than 14 days
- Libraries are conscientious and concerned about being good stewards of other libraries' material.
- Our neighboring consortium/system (CCS/CPL) block at much lower thresholds and across the board. Both treat items 7-days overdue as lost, with replacement cost billed to patron. Upon return, that replacement cost is removed.

	Patron Profile Limits	Nightly Overdue Time Period Block
Parameters	<ul style="list-style-type: none"> Billing threshold – items overdue 42 days are considered lost and added to bills Items Overdue – number of items that can be overdue (1 day) before record is blocked 	<ul style="list-style-type: none"> Nightly job reviews any patrons with overdue items > 14 days checked out at your library; updates patron status to blocked
Patron Experience	<ul style="list-style-type: none"> Patron limit determines when account is blocked, regardless of which library they use If home library does not have overdue limits, the patron will not be blocked until meeting a bill threshold 	<ul style="list-style-type: none"> Home library patron profile is checked for blocking, so other blocks may occur if profile has limits If home library does not block for overdues, patrons will not be blocked until 1 item becomes overdue for 14 days
Benefits	<ul style="list-style-type: none"> Home library patrons know limits and when to expect blocks to be applied Patrons can balance return of material to manage blocks 	<ul style="list-style-type: none"> Assuming no limits are reached, patrons are given 2-weeks before account is blocked Only items > 14 days overdue are considered in nightly block update
Challenges	<ul style="list-style-type: none"> When limit is reached, patron is immediately blocked Block is not cleared until number of overdue items falls beneath the limit 	<ul style="list-style-type: none"> Block is applied via a report run nightly, which may be updated to OK when the patron record is opened in WorkFlows. WorkFlows recalculates status when patron record is opened. This leads to staff confusion. Staff have to pay attention to Alerts and overdue dates/items.
Recommendation	<ul style="list-style-type: none"> Allow libraries to set bill threshold Move to a universal limit on overdue items allowed for patron account (not applied to in-house accounts) – 11 items 	<ul style="list-style-type: none"> Use in addition to a universal overdue limit if library wishes to block even with 1 item overdue for more than 14 days.

How many patrons have overdue items?


- Very little statistical difference in number of patrons with items 14 days overdue vs 21
- So, do we even need to go back to the 14 day block?

Work with e-content vendors to remove blocks based on patron status to avoid disruptions to patrons blocked when accessing e-content.



Processing Fees

- Processing fee is assessed by checkout library for lost items
- Default Price Policy is set by each library; if none, SWAN default is applied
- Item price should be set for each item. BcAnalytics report – [List items with no item price](#)
- See Support Site: [Documentation > ILS Configuration > Item Configuration](#) > Default Price



July 1, 2021

Default
processing fee
will be \$0

URLs in notices

- An additional field with your library's Enterprise URL
- Notice text will be removed,
"Contact the library listed above or visit <http://catalog.swanlibraries.net> to view a list of libraries with links to their catalog. To see if the item(s) can be renewed, log into "My Account" in your library catalog and click on the Checkouts tab. Thank you."
- No changes needed by you!
- Aspen pilot libraries – No link until Aspen go-live launch

Friday, April 2, 2021

Indian Prairie Public Library District
401 Plainfield Road
Darien
IL 60561
Tel: (630) 887-8760
<https://catalog.swanlibraries.net/ins>

Please disregard this notice if you returned your material in the past week.
All material is held in quarantine before being checked in.

Due to library closures, please check that your library's book drop is open before returning library items.

Due dates and fines will be adjusted to accommodate closures.

The item(s) below is due soon.

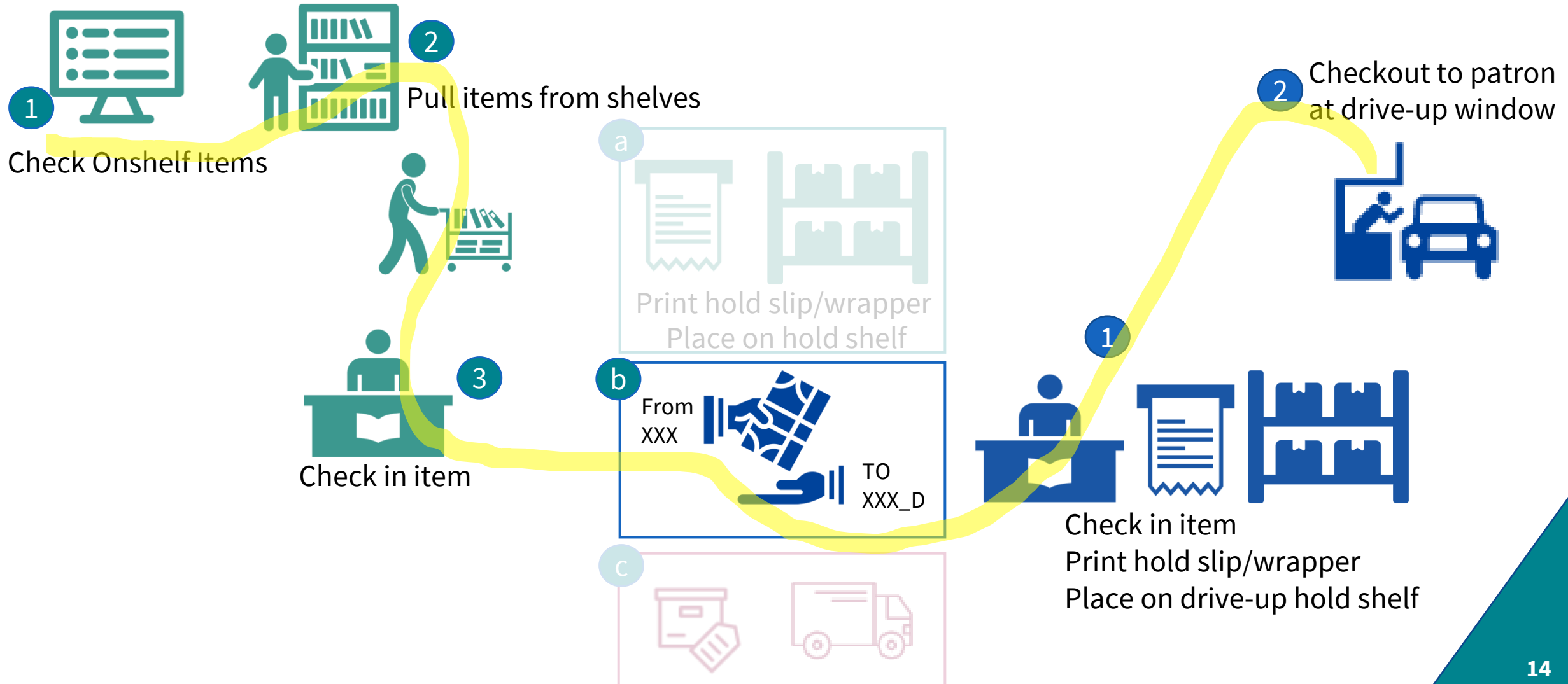
1 call number:SWS SWAN 2
SWS inflatable swan.
due:3/6/2021,23:59

ID:SWS SWAN 2

Pseudo-libraries

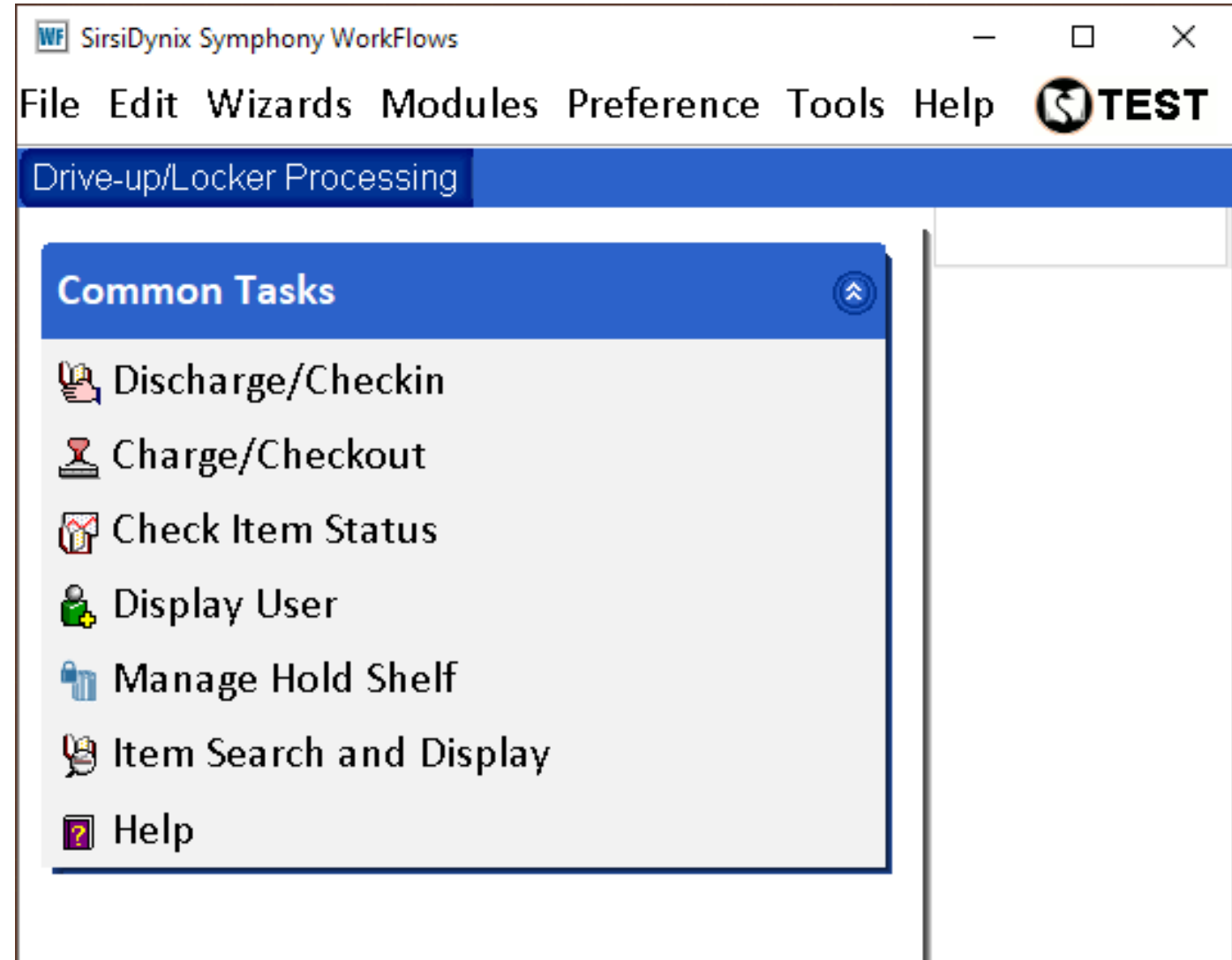
- Used as a patron pick-up point for holds
 - Selected by patron when placing a hold
 - Patron can modify pick-up point preference before hold is filled
- No patrons are associated with the pick-up point
- No items are held by the pick-up point
- Used to facilitate “transit” between main library and special hold shelf
- Once item is ready to process for special hold shelf, item is checked in, hold slip generated, processed for patron pick-up
 - Checkout must be completed by Pseudo Library to properly remove title from hold shelf

Drive-up window processing – staff experience



XXXCIRCDRV

Limited access to WorkFlows functions – only use to process holds for pick-up at the pseudo library (Drive-up Window or Lockers)



Patron Record Purge

Purge criteria

- Last Activity Date (LAD) prior to 1/1/2018
- Patron records flagged in the 2018 NCOA that have not been verified/updated

Bills paid via SWANPURGE

- Bills associated with bad address/mail returned
- LAD before 1/1/2018; bills <=\$10
- LAD before 1/1/2011; bills \$10.01-\$200
- LAD before 1/1/2011 and Status = Collection

Patron Record Purge Timeline



May 1, 2021

- Instructions posted
- Reports for review



May 15, 2021

- Review reports
- Update records, if necessary



May 22, 2021

- Pay bills with SWANPURGE, based on criteria



May 29, 2021

- Remove inactive patron records

National Change of Address (NCOA)

Who submitted?

- Public library patrons only
- First address in patron record, if using PO box, indicate as secondary address and mark as primary contact

Geo-location

- Patrons active after 1/1/2020 will receive geo-location longitude/latitude

Record update actions

- Replace first address in patron record
- Add a note NCOA 2021 – Previous address
- Report changed report for review and outreach
- No change in patron status
- 90-day post update, remaining with NCOA 2021 notes, status updated to BADADDRESS

Weekly processing of inactive accounts

- Starting July 2021 perform weekly patron maintenance/record removal of inactive accounts 3+ years.
- Move from annual process to ongoing patron management of inactive accounts.
- Provide reports and assistance in automating notification of patrons turning 18.

Benefits:

- Eliminate dramatic patron record count changes – keep consistent counts.
- Reduce personal information stored on inactive users.
- Focus on proactive communication, outreach, and resolution of billing.

NCOA Timeline



Jul 1, 2021

- 1st and 2nd address reports
- Instructions for updating PO Box



Jul 15, 2021

- Review reports
- Update records, if necessary



Sep 1, 2021

- Submit records to Unique



Oct 15, 2021

- Update patron record address changes
- Add NCOA 2021 note field, geo-location

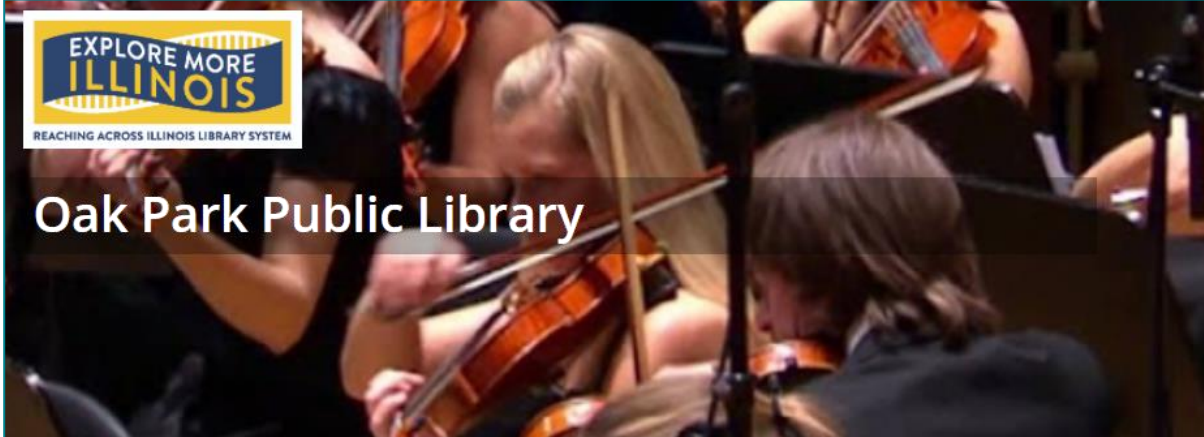


Feb 1, 2022

- Update status to BADADDRESS with remaining NCOA 2021 notes

Explore More Illinois

- All SWAN libraries are configured for patron verification.
- If your library would like to participate, contact RAILS at info@exploremoreillinois.org; please copy help@swanlibraries.net
- SWAN will work with RAILS to help test setup.
- Currently 69 of 95 SWAN public libraries participate.



EXPLORE MORE ILLINOIS
REACHING ACROSS ILLINOIS LIBRARY SYSTEM

Oak Park Public Library

Explore More Illinois - Login

Explore More Illinois Notice

Library Card Number *

Enter your Library Card Number

PIN *

Enter your PIN

☐ Remember Me

What is Explore More Illinois?

Explore More Illinois is a free service provided by your library that provides instant online access to free and discounted tickets to museums, science centers, sporting events, zoos, park districts, theatres, and other fun and local cultural venues.

How do I get a pass?

Log in with your library card credentials and browse for passes by date or attractions. **If you do not know your PIN or password, or if you have problems logging into Explore More Illinois, please contact your home library.** Make your reservation and print or download your pass shortly before your visit. You can have three active reservations per library card. Please cancel your reservation(s) if unable to attend, otherwise the reservation will count as being used. Remember that once you print or download your pass you cannot cancel your reservation.

For more information, visit the [Explore More Illinois homepage](#).

How do I make a camping reservation or purchase/renew a Department of Natural Resources license or permit?

Explore More Illinois is not affiliated with the Illinois Department of Natural Resources. Our website domains are similar. Please visit the [Illinois Department of Natural Resources online portal](#) to make reservations or purchase licenses and permits.

Example: <https://exploremore.quipugroup.net/?OakPark>


SWAN Notice Dialer Pilot

- Currently piloting with Elmwood Park, Eisenhower patrons
 - 2-3 week pilot period
- Priorities
 - Caller ID
 - (Optional) can now include library's phone AND name
 - End of Day call analytics emailed report
 - Currently includes only failed calls
 - Attempting to include successful calls
 - Notice script tweaks
 - Some names are spelled out awkwardly
 - Other identified issues
 - Occasional voicemail issues



Support Site & OTRS Migration

- Services unavailable during 7PM outage:
 - SWAN Support Site
 - Access to documentation, training, and SWAN events
 - SWAN Ticketing System
 - Access to submit/review/comment on tickets
 - Automatic processing of tickets submitted to help@swanlibraries.net
 - Please call 844-SWAN-LIB (844-792-6542) for urgent issues during this time



**Wed, April 28th
7PM**

**Support Site &
OTRS migration
to Microsoft Azure
cloud**

Interactive Staff Trainings

[Meetings & Trainings>Tutorials & Training Resources](#)

Look Online Training in results.

Currently there are four online self-paced courses with more in the works!

Recent Training Recordings

[Member Update Recording: Aspen Update April 2021](#)

Updated date: Apr 15, 2021

[Online Training: Demystifying Serials](#)

Updated date: Apr 1, 2021

[Online Training: Creating Pre-Cats](#)

Updated date: Apr 1, 2021

[Online Training: Circulation Basics](#)

Updated date: Mar 30, 2021

[Online Training: Patron Management](#)

Updated date: Mar 22, 2021

EBSCO Database Selections

The databases are the same as last year.

<https://support.swanlibraries.net/documentation/70949>

May 3-16 selection form available sent via SWANcom

We ask that everyone fill it out even if you are not making changes.

By July 1 start of the subscription we will send out another SWANcom with all the links, updated patron site, and EDS updated

Poll - Group Purchases

We're exploring opt-in group purchase opportunities.

Is your library interested in:

- Kanopy
- Reference Solutions (formerly Ref USA)



EBook & Streaming Borrowing Rules

We recommend allowing patrons to borrow without restriction

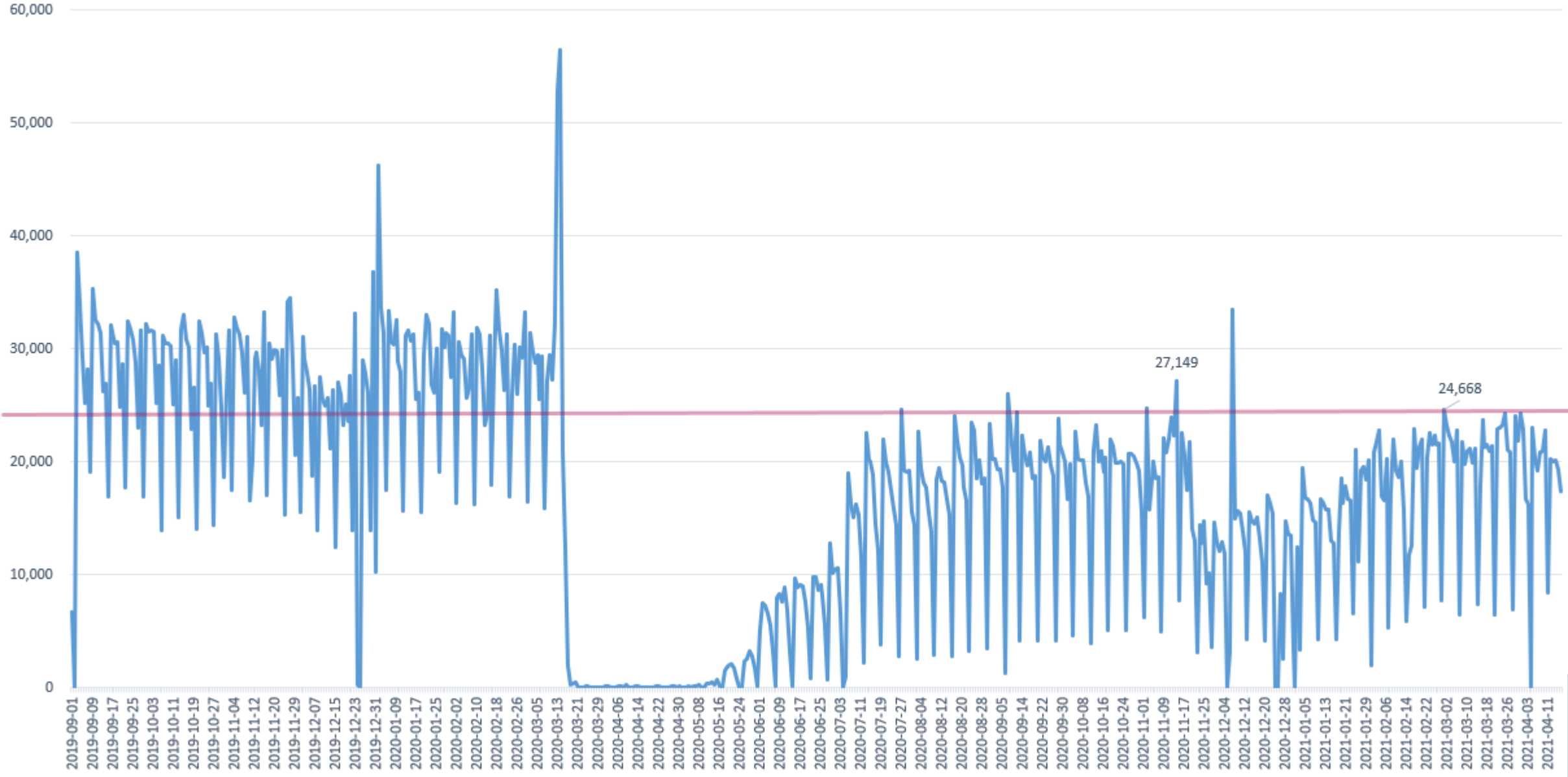
Fine Free library patrons will be blocked from borrowing eBooks and streaming if the print material is overdue

Contact your sales representative at OverDrive and Hoopla to make those changes

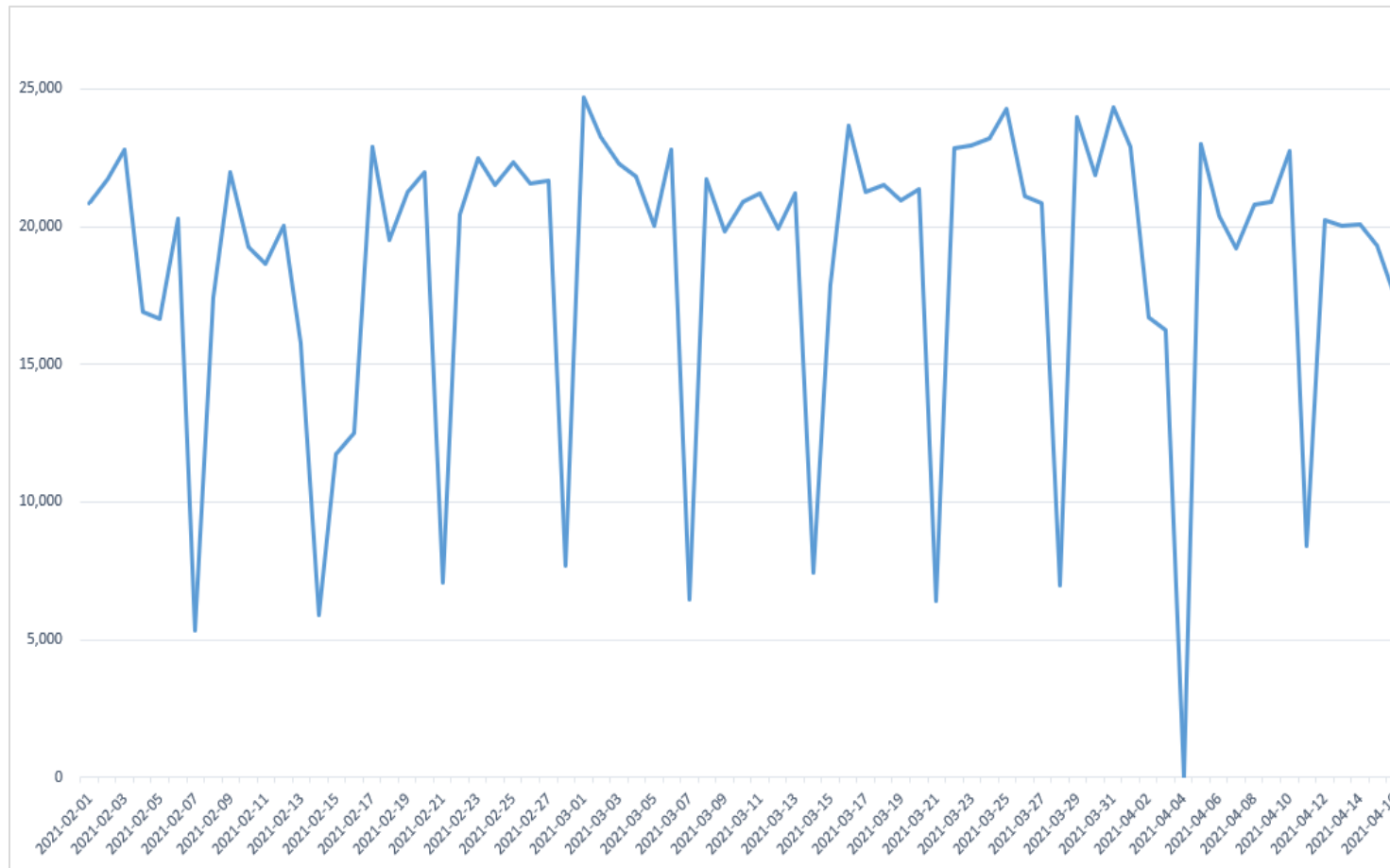
Statistics

Note: These statistics and a few more are reported in the Monthly Operations Report, available online in the [monthly Board packet](#), publicly available.

Checkouts 9/1/2019 - 4/16/2021 [100 SWAN Libraries]

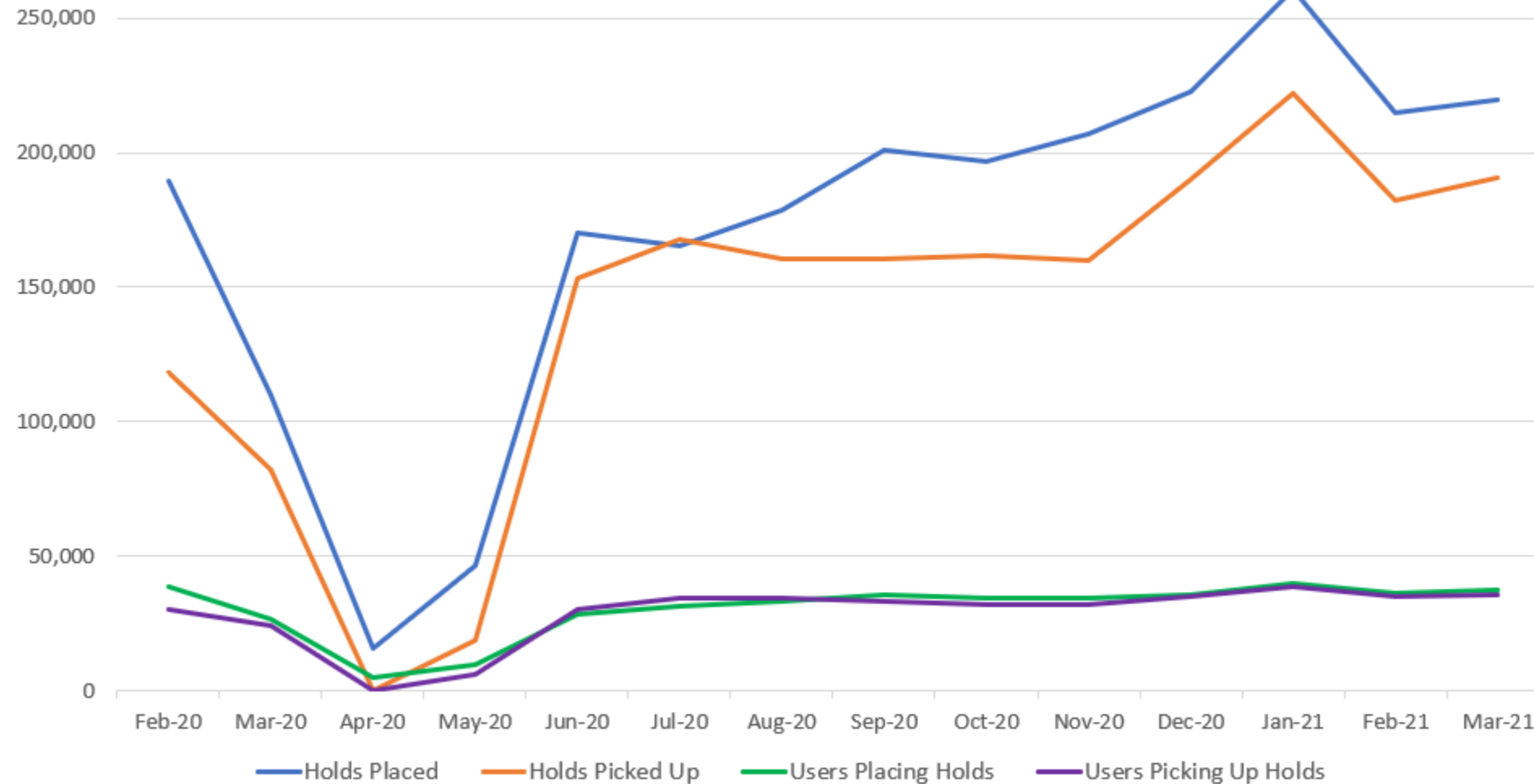


Steady since Feb 1, 2020

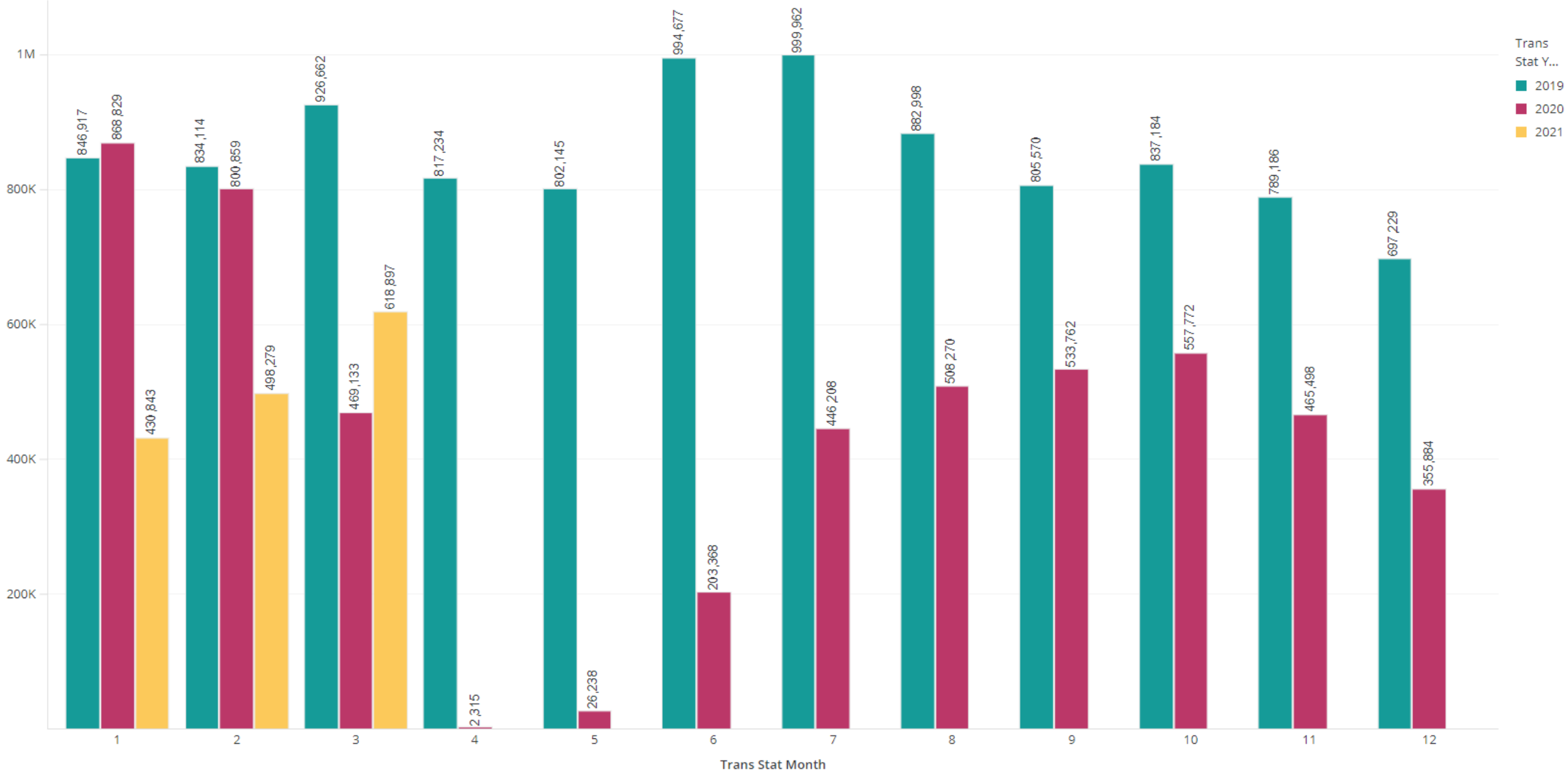


- Nine of ten weeks, since Feb 2021, highest circulation day is Monday.
- Little variation in circulation Monday – Saturday.

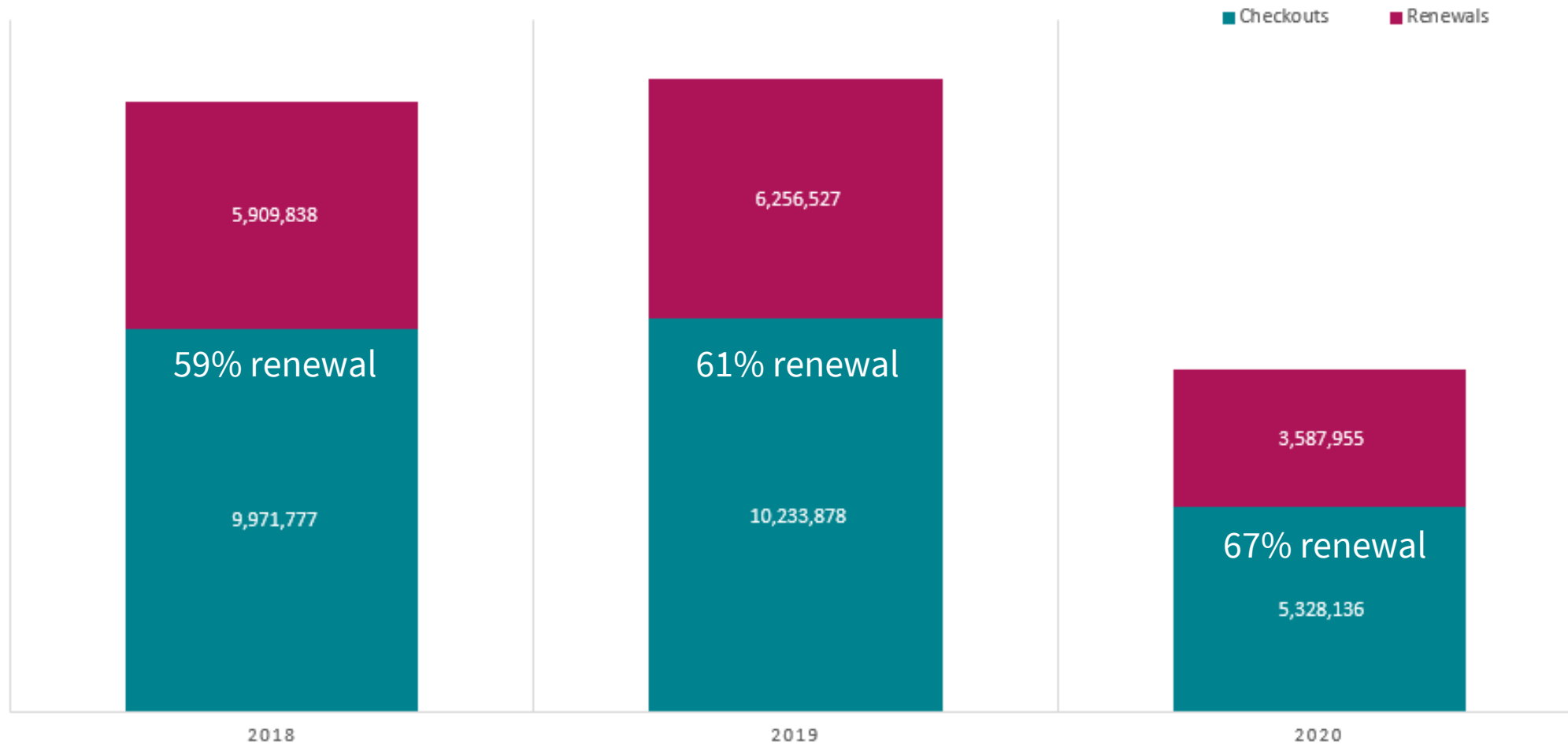
Trends in Holds, Feb 2020 – Mar 2021



Prior Year Comparison

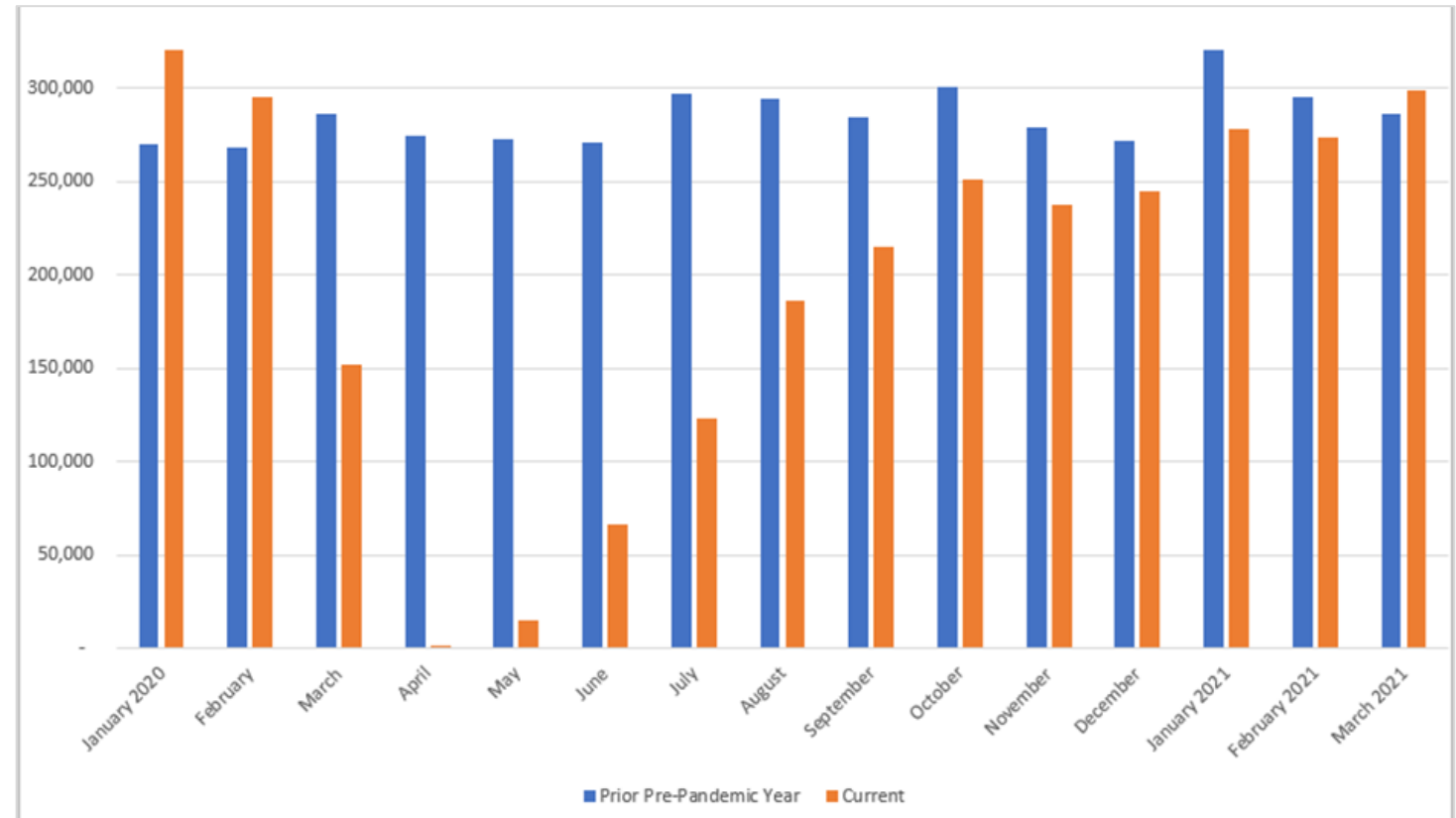


Checkouts vs Checkouts & Renewals



2019 vs 2020/2021 Circulation & Transits

	Prior Pre-Pandemic Year	Current	% change
January 2020	269,481	320,142	19%
February	268,464	294,829	10%
March	286,066	151,830	-47%
April	274,734	1,340	-100%
May	272,468	15,287	-94%
June	270,908	66,066	-76%
July	296,871	123,522	-58%
August	294,591	186,020	-37%
September	284,312	215,022	-24%
October	300,220	250,734	-16%
November	279,280	237,628	-15%
December	271,716	244,905	-10%
January 2021	320,142	278,152	-13%
February 2021	294,829	273,757	-7%
March 2021	286,066	299,023	5%
	4,270,148	2,958,257	-31%



Back to pre-pandemic transit volume.

Save the Date!

ILL Boot Camp

Go to L2 to register:

<https://librarylearning.org/event/2021-05-06/swan-ill-boot-camp-basics-worldshare-ill>

<https://librarylearning.org/event/2021-05-27/swan-ill-boot-camp-borrowing-worldshare-ill>

<https://librarylearning.org/event/2021-06-24/swan-ill-boot-camp-lending-worldshare-ill>

<https://librarylearning.org/event/2021-07-01/swan-ill-boot-camp-policies>

April 27, 2021



SWAN ILL Boot Camp (Basics of WorldShare ILL)

GoToMeeting

Event Type(s)
Training

Sponsor
SWAN - System Wide Automation Network



SWAN ILL Boot Camp (Borrowing in WorldShare ILL)

GoToMeeting

Event Type(s)
Training

Sponsor
SWAN - System Wide Automation Network



SWAN ILL Boot Camp (Lending in WorldShare ILL)

GoToMeeting

Event Type(s)
Training

Sponsor
SWAN - System Wide Automation Network



SWAN ILL Boot Camp (Policies)

GoToMeeting

Event Type(s)
Training

Sponsor
SWAN - System Wide Automation Network

Save the Date!

Directors' Coffee Hour

Go to L2 to register:

<https://librarylearning.org/event/2021-04-16/swan-directors-coffee-hour>

Library membership benefits
Resource sharing
Annual fees
How SWAN Support works

See SWAN Support:
Meetings & Trainings » Trainings »
Tutorials & Training Resources



**In Case You
Missed It...**

Aspen Member Update Q&A Recording

View the recording:

Meetings & Trainings > Tutorials &
Training Resources

<https://support.swanlibraries.net/tutorial/85801>



SWAN Board Election: 2 Seats July 1, 2021 Start 3-year term

The SWAN Board is comprised of seven library directors/administrators elected at-large from the libraries in SWAN. Board meetings are held monthly on a Friday of each month at 9:30a.m.

Election Process Announced	March 4, 2021 (Quarterly)
Online Self-Nominations Accepted	April 5 – 30, 2021
Names of Candidates Released	May 3, 2021
Electronic Ballot	May 10 – May 31, 2021
Results Announced	June 1, 2021
Elected Candidates invited to June SWAN Board Meeting	June 18, 2021
Candidates' Terms Begin	July 1, 2021
July Board Meeting	July 23, 2021

Other Upcoming Meetings

- [See SWAN's events on L2](#)



SWAN BLUEcloud Analytics for Directors Series

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN ILL Boot Camp (Basics of WorldShare ILL)

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN Academic & Special Library Consultation

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN BLUEcloud Analytics Office Hour

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN Cataloging Advisory

GoToMeeting

Event Type(s) Meeting

Sponsor SWAN - System Wide Automation Network



SWAN Board Meeting

GoToWebinar

Event Type(s) Meeting

Sponsor SWAN - System Wide Automation Network



SWAN Circulation/ILL Office Hours

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN Cataloging Office Hours

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN ILL Boot Camp (Basics of WorldShare ILL)

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN BLUEcloud Analytics for Directors Series (Assessing the collection)

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network

Thank you!

Next Fireside Chat: May 25th– 11:00-12:00

<https://librarylearning.org/event/2021-05-25/swan-members-fireside-chat>