



SWAN Fireside Chat

May 25, 2021

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Agenda

Post-pandemic return

- CDC Guidelines, ILA statement on masking
- Results for Questionnaire on Returning to post COVID policies
- Grace period reset – June 1, 2021
- Fine Free decisions and numbers
- Processing fee

Project Updates & Happenings

- BLUEcloud Mobile App – Self Checkout
- SWAN Notice Dialer
- Planning for Symphony 3.7.1 Upgrade
- Patron record purge & NCOA
- Pseudo Libraries
- Diversity, Equity, and Inclusion in Metadata
- Aspen
- E-resources Update
- Statistics
- Upcoming Events & Meetings

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CDC Guidelines & ILA Alert



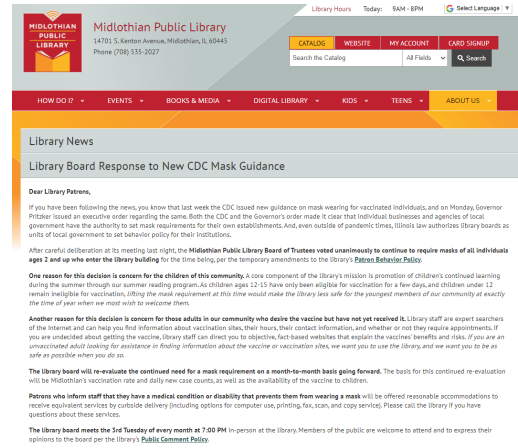
<https://mailchi.mo/ila/ila-alert-news-from-the-illinois-library-association-736477>

COVID-19 Update

On May 17, 2021, Governor Pritzker issued **Executive Order 2021-10**, aligning the State of Illinois' mask mandate with recently released **CDC guidelines**. Executive Order 2021-10 preserves the right of local municipalities and individual businesses and organizations to maintain stricter masking and social distancing requirements than the state's, consistent with the CDC guidelines, which state "that [fully vaccinated people] can resume numerous activities without wearing a mask or staying 6 feet apart, **except where required by federal, state, local, tribal, or territorial laws, rules, and regulations, including local business and workplace guidance.**" (emphasis is ILA's) Specifically, executive order 2021-10 states in section 3:

"3. Public health requirements for businesses, nonprofits, and other organizations. For the purposes of this Executive Order, covered businesses include any for-profit, nonprofit, or educational entity, regardless of the nature of the service, the function it performs, or its corporate or entity structure. Those entities must take the following public health measures to protect their employees, their customers, and all others who come into physical contact with their operations. **Nothing in this Executive Order prevents these entities from undertaking stricter or additional public health measures;** to the contrary, businesses are encouraged to prioritize the health and safety of their workers and customers, and may continue to require face coverings and social distancing, even for those who are fully vaccinated." (emphasis is ILA's)

Throughout the Bridge Phase, libraries have the right to maintain or alter masking and social distancing policies that fit the metrics in their communities and meet the needs of the populations served, including young children not yet eligible for vaccination and/or teens and adults who cannot receive the vaccine.



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Polls – Library Masking Policy

Given the change in CDC guidelines, how is your library handling masking for both staff and the public?

We've got a series of 6 poll questions.



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Returning to Post-COVID19: Questionnaire Results

- 28 libraries have responded
- Please complete the survey:
See News Post from 5/13 -
<https://support.swanlibraries.net/news/2021-05/86140>
- Responses help guide us in making recommendation to ease back into pre-pandemic practice and policies, as well as adjust based on current membership preferences

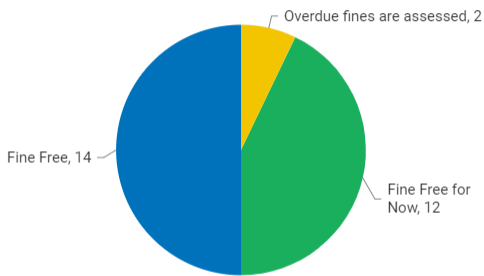
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What is your current circulation policy?



28 responses in 28 results

Fine Free Libraries: Which of the following blocking conditions does your library prefer?

Result	Responses	Percentage
Block at 14 days if any item overdue	4	15.3%
Block at 21 days if any item overdue (COVID change)	7	26.9%
Block based on number of items overdue (patron profile)	4	15.3%
Block once total amount owed in bills reaches billing threshold	11	42.3%

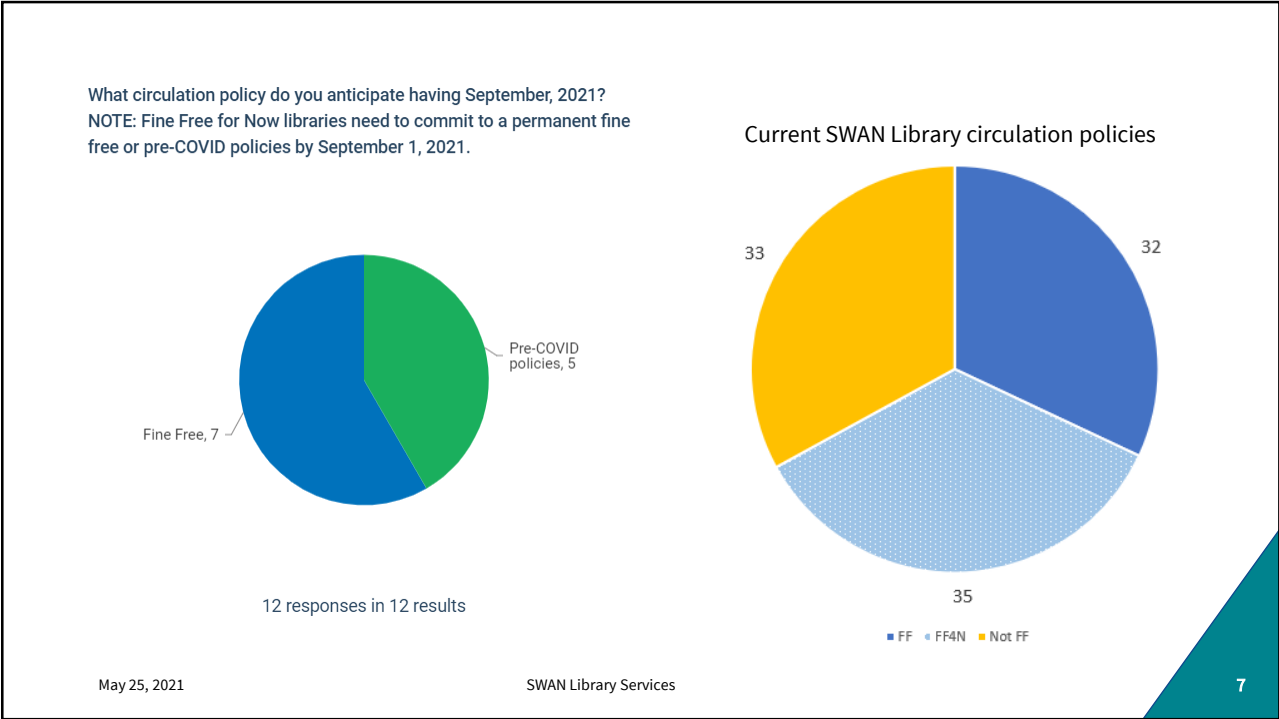
26 responses in 26 results

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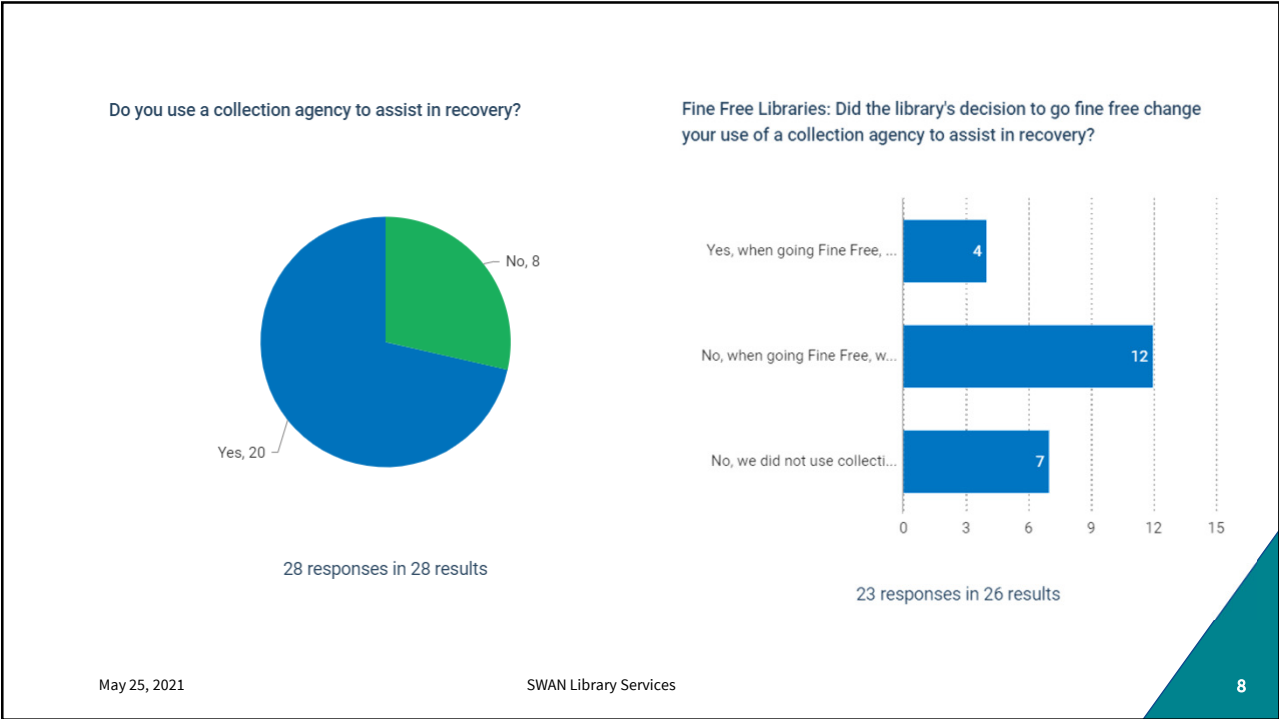
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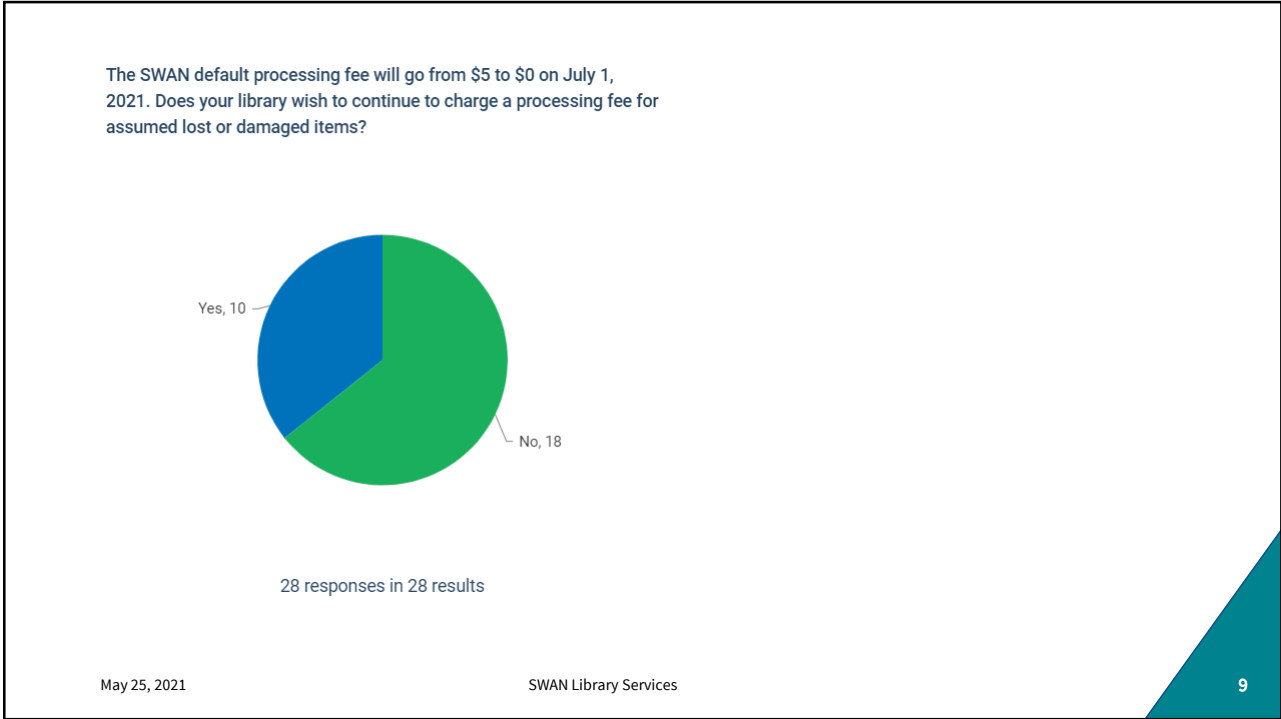


Fine Free Libraries: Did the library's decision to go fine free change your use of a collection agency to assist in recovery?



23 responses in 26 results

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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

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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

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Current Processing Fee Breakdown

- 18 libraries currently assess a processing fee - no change
- 30 libraries/agencies currently have processing fee of \$0 – no change
- 56 currently have no entry in default price table; will change to \$0 on July 1st unless your library submits a support ticket

If your library is not listed on the next slide and you want to retain the \$5 processing fee, submit a support ticket requesting "Please set our library default price processing fee to \$5.00"

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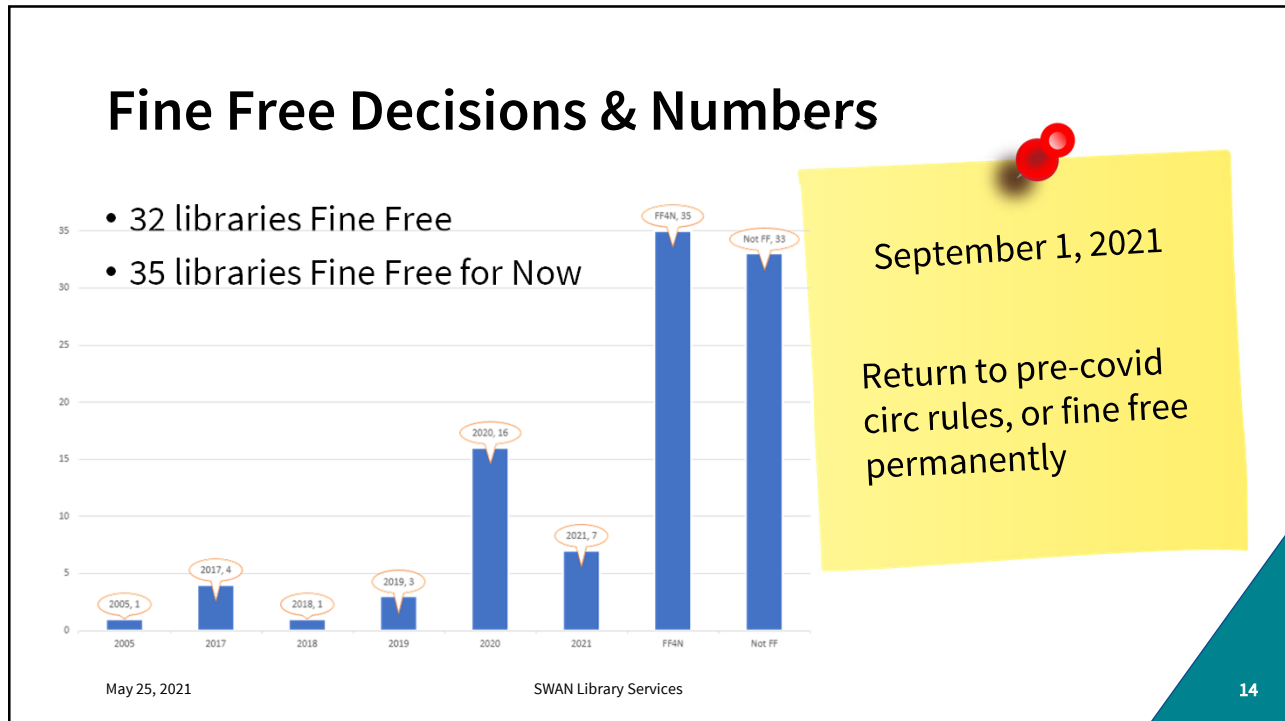
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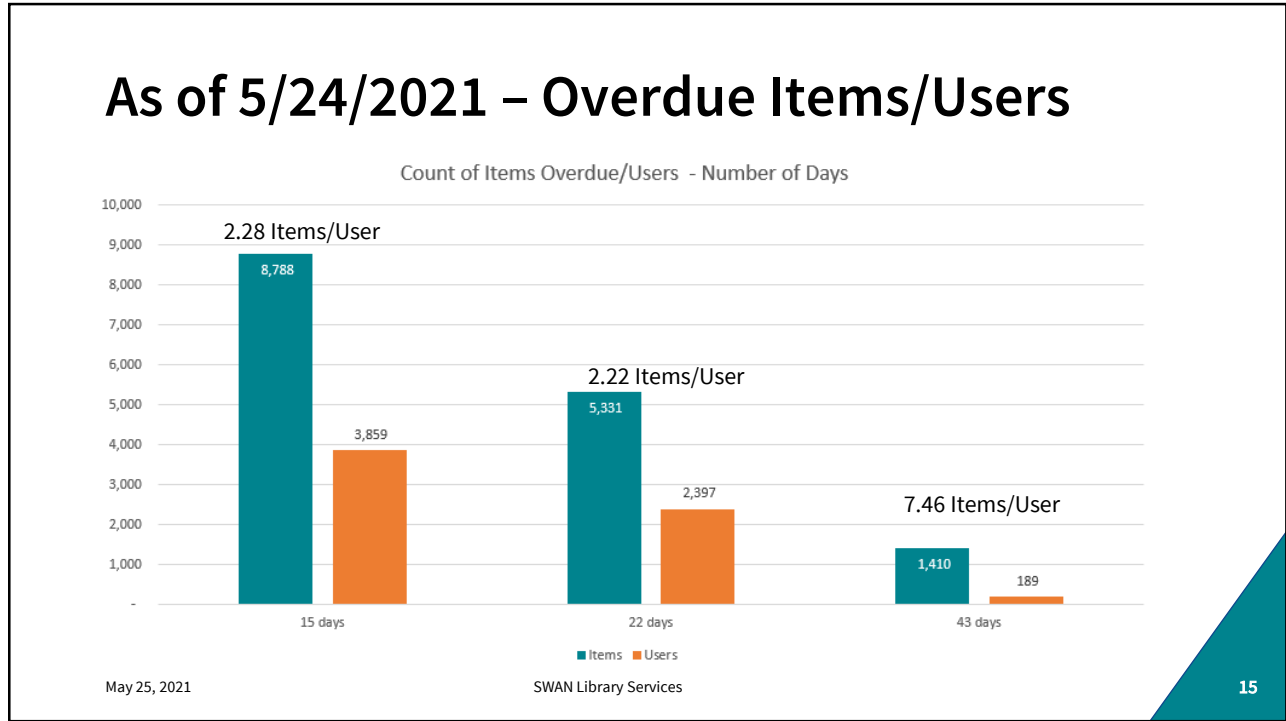
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Name	Description	Library	Processing Fee	Name	Description	Library	Processing Fee
BBDDEFAULT	Bensenville Black Hawk School Default Price Policy	BBD	\$0.00	GEDDEFAULT	Glen Ellyn Default Price Policy	GED	\$3.00
BVDDEFAULT	Bensenville Default Price Policy	BVD	\$0.00	ADSDEFAULT	Acorn Default Price Policy	ADS	\$5.00
BTDDDEFAULT	Bensenville Trioga School Default Price Policy	BTDD	\$0.00	AMSDEFAULT	Alsip Merrionette Park Default Price Policy	AMS	\$5.00
BJDDEFAULT	Bensenville WA Johnson School Default Price Policy	BJD	\$0.00	BLDDEFAULT	Batavia Default Price Policy	BLD	\$5.00
BKSDEFAULT	Berkeley Default Price Policy	BKS	\$0.00	BPSDEFAULT	Bedford Park Default Price Policy	BPS	\$5.00
BDDDEFAULT	Bloomington Default Price Policy	BDD	\$0.00	BFSDEFAULT	Brookfield Default Price Policy	BLD	\$5.00
CSDDEFAULT	Carol Stream Default Price Policy	CSD	\$0.00	FMSDEFAULT	Flossmoor Default Price Policy	FMS	\$5.00
CRSDEFAULT	Chicago Ridge Default Price Policy	CRS	\$0.00	GVDDEFAULT	Geneva Default Price Policy	GVD	\$5.00
DGSDEFAULT	Downers Grove Default Price Policy	DGS	\$0.00	HSSDEFAULT	Hillside Default Price Policy	HSS	\$5.00
EPSDEFAULT	Elmwood Park Default Price Policy	EPS	\$0.00	INSDEFAULT	Indian Prairie Default Price Policy	INS	\$5.00
GHSDEFAULT	GHS Default Price Policy	GHS	\$0.00	MTSDEFAULT	Matteson Default Price Policy	MTS	\$5.00
GSDDEFAULT	Glenside Default Price Policy	GSD	\$0.00	NRSDEFAULT	North Riverside Default Price Policy	NRS	\$5.00
HDSDEFAULT	Hinsdale Default Price Policy	HDS	\$0.00	OLSDEFAULT	Oak Lawn Default Price Policy	OLS	\$5.00
ITDDDEFAULT	Itasca Default Price Policy	ITD	\$0.00	PCSDDEFAULT	Prairie State College Default Price Policy	PCS	\$5.00
MEDDEFAULT	Messenger Default Price Policy	MED	\$0.00	SCDDEFAULT	Saint Charles Default Price Policy	SCD	\$5.00
NUDDDEFAULT	National University of Health Sciences Default Price Policy	NUD	\$0.00	SPSDEFAULT	Schiller Park Default Price Policy	SPS	\$5.00
NLSDEFAULT	Northlake Default Price Policy	NLS	\$0.00	TPSDEFAULT	Tinley Park Default Price Policy	TPS	\$5.00
OESDEFAULT	Oak Park Dole Default Price Policy	OES	\$0.00	WOSDEFAULT	Worth Default Price Policy	WOS	\$5.00
OPSDEFAULT	Oak Park Main Default Price Policy	OPS	\$0.00				
OZSDEFAULT	Oak Park Maze Default Price Policy	OZS	\$0.00				
RFSDEFAULT	River Forest Default Price Policy	RFS	\$0.00				
RSSDEFAULT	Riverside Default Price Policy	RSS	\$0.00				
RODDEFAULT	Roselle Default Price Policy	ROD	\$0.00				
SGDDEFAULT	Sugar Grove Default Price Policy	SGD	\$0.00				
TFSDEFAULT	Thomas Ford Default Price Policy	TFS	\$0.00				
TCDDDEFAULT	Town & Country Default Price Policy	TCDD	\$0.00				
VPDDEFAULT	Villa Park Default Price Policy	VPD	\$0.00	DEFAULT	Default Price Policy	ALL	\$0.00
WVDDEFAULT	Warrenville Default Price Policy	WVD	\$0.00	ILL-BOOK	Default SWAN price for ILL-BOOK	ALL	\$0.00
WCDDEFAULT	West Chicago Default Price Policy	WCD	\$0.00	NS_ILL_PRT	Default SWAN price for NS_ILL_PRT	ALL	\$0.00
WDDDEFAULT	Wood Dale Default Price Policy	WDD	\$0.00	NS_ILL_VID	Default SWAN price for NS_ILL_VID	ALL	\$0.00

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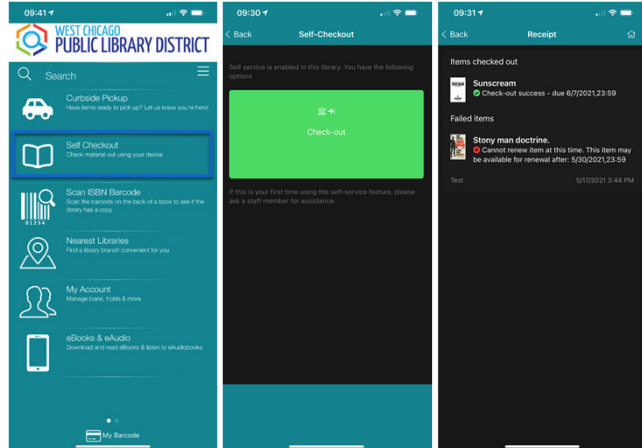
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	Patron Profile Limits	Nightly Overdue Time Period Block
Parameters	<ul style="list-style-type: none"> Billing threshold – items overdue 42 days are considered lost and added to bills Items Overdue – number of items that can be overdue (1 day) before 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.

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BLUEcloud Mobile App – Self Checkout

- Add-on tool for BLUEcloud Mobile App allowing patrons to check out materials from within the boundaries of the library
- Currently in pilot with West Chicago Public Library staff, soon to expand to West Chicago patrons
- Following pilot, will become available for all interested libraries
 - Watch for news post/announcement
- Requires use of location services on patron's mobile device
 - Determines if location is within library geo-fencing, based on latitude/longitude
 - Does not require use of beacon device



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SWAN Notice Dialer Pilot

- Live TODAY (May 25th) for patrons with PHONE notice preference
 - Delivering 1st overdue notice (14 days), 1st hold notice
 - Full info, training video in [news post](#)
- What you need to know:
 - Within the first month of the migration, please submit a [help ticket](#) to SWAN to let us know if you'd like to opt-in to have your library's main phone number displayed in the caller ID for your patrons. If you do not opt-in to this service, calls for your library will display SWAN's default toll-free number, **1-877-662-8190**.
 - Anticipate daily emails detailing failed calls for the day from Unique's email address (messagebeefailednotificationexport@unique-mgmt.com). They'll be sent to your [aaal@notices.swanlibraries.net] alias. Please follow-up with patrons as necessary. We also recommend whitelisting the @unique-mgmt.com email domain to ensure these emails are not blocked by spam filters.



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Support Site & OTRS Migration

- Migration completed April 28th
 - SWAN Support Site
 - SWAN Ticketing System
- Verify that emails generated by these systems are not landing in your spam folders

Wed, April 28th

COMPLETED

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Symphony 3.7.1 Upgrade

Tentatively scheduled for early July

- WorkFlows client updates will be required by mid-August
- Formal announcement/news post coming soon

Changes coming to Manage Hold Shelf wizard

- This and other changes will be detailed in an upcoming webinar

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Patron Record Purge & Bill Clean-up

See:

- [News Post 5/17](#)
- [SWAN Community Forums](#)
- [June Quarterly Discussion](#)

What we heard:

1. Be more conservative in selection criteria
2. Provide reports to assist libraries in ongoing record review
3. Move to an ongoing process by Fall 2021

Target dates:

- Begin August, 2021 with monthly clean-up
- NCOA – Fall, 2021



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Criteria Adjustments for Discussion

Concern	Adjustment
Last Activity Date (LAD) is before Expiration Date	Update LAD to "today" to reset prior to removal criteria review
OpenAthens and other services do not appear to be setting Last Activity Date consistently	Use Athens 1-year archive of barcodes to capture active barcodes in past year; update LAD to "today" to reset prior to removal criteria review
Bill removal criteria	Consider opt-out for libraries Ability for library to archive records for pursuance Discussion of \$100 vs \$200 threshold for > 10+yrs
Last Activity of 3 yrs seems aggressive given lost year or more due to pandemic	Start with 10+ year removal Work toward 5+ year removal by 1/1/2023
Edit of user address information does not update Last Activity Date	Symphony 3.7.1 settings can make this possible

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Patron Record Purge

Purge criteria

- Last Activity Date (LAD) prior to ~~1/1/2018~~ **1/1/2011**
- Patron records flagged in the 2018 NCOA that have not been verified/updated **with LAD prior to 1/1/2011**

Bills paid via SWANPURGE

- Bills associated with bad address/mail returned **<=\$200**
- LAD before 1/1/2011; bills \$10.01-\$200 (**regardless of status**)
- LAD before 1/1/2018; bills **<=\$10 (regardless of status)**

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Timeline Targets

- Update Last Activity Date
- Review/remove bills
- Allow library to review/update patron records

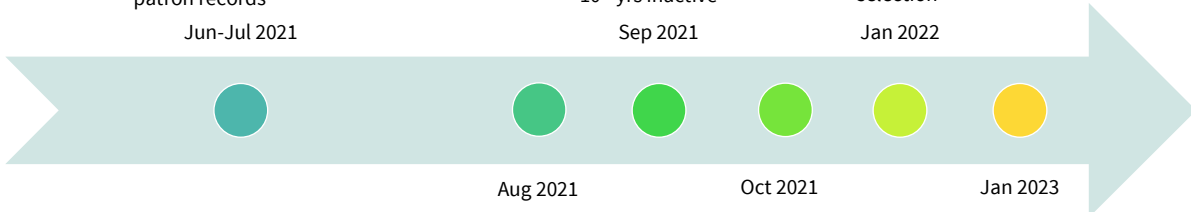
Jun-Jul 2021

Start monthly removal of record 10+ yrs inactive

Sep 2021

Move to 7+ years inactive criteria for selection

Jan 2022



Aug 2021

Start monthly reporting of records to remove

Oct 2021

NCOA all remaining & geo-code active in last year records

Jan 2023

Move to 5+ years inactive criteria for selection

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Pseudo-libraries

- 8 Pseudo Libraries will be added in next month
- Use first 3 characters of agency code for transit labels
- Circulation/hold maps mirror home library

DGS_L	Downers Grove Public Library Locker
GED_D	Glen Ellyn Public Library Drive-up Window
GVD_D	Geneva Public Library Drive-up Window
INS_D	Indian Prairie Public Library District Drive-up Window
OPS_LI	Oak Park Public Library Main Branch Indoor Locker
OPS_LO	Oak Park Public Library Main Branch Outdoor Locker
SCD_D	St. Charles Public Library District Drive-up Window
VPD_L	Villa Park Public Library Locker

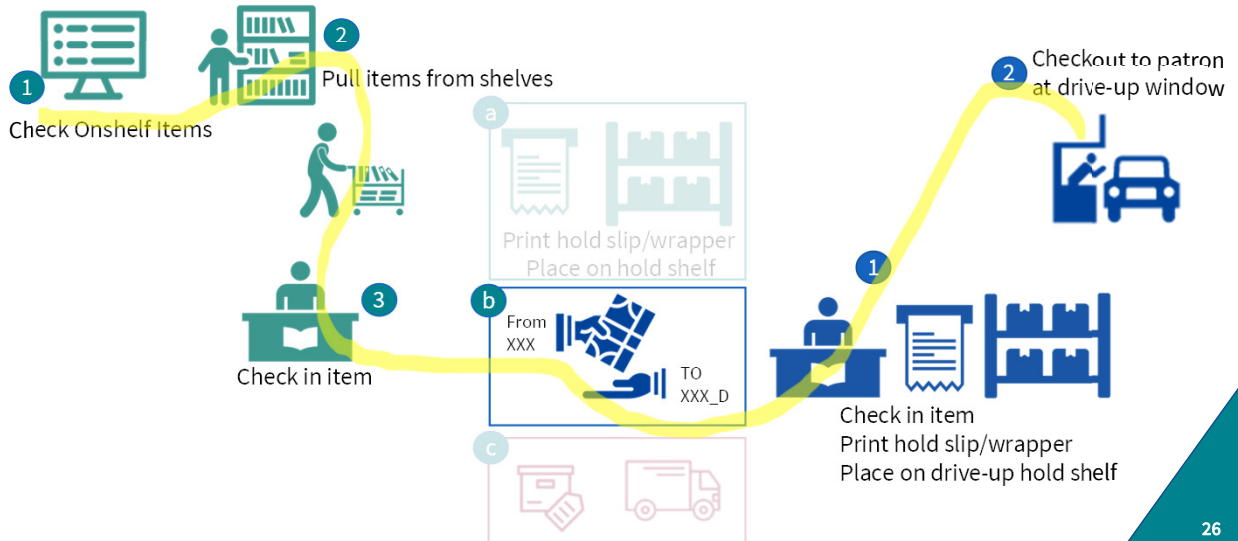
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Drive-up window processing – staff experience



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Diversity, Equity, and Inclusion in Metadata

Task force to evaluate our catalog and ensure terms describing groups of people are modern, respectful, and granular.

Goals:

- Evaluate LC subject headings and set up automated updating of problematic and outdated terms
- Consider optional supplementary subject vocabularies to improve access to resources concerning groups not currently represented
- Provide recommendations on improving visibility of diversity resources and Own Voices collections
- Collect resources on performing diversity audits for interested members

Aspen Updates

This month, we have focused on performance and stability:

- Added MARC record and e-resource indexes for all 100 catalogs – which drastically increased memory usage and index times
- Decreased index size and run times by half
- Added several checks to ensure if we have memory issues in the future, partial exports will not be processed

We're awaiting one last go-live feature: ProPay integration

Nightly Indexes

Id	Started	Last Update	Finished	Elapsed	Works Processed	Num Errors
348	05/20/21 23:00:02	05/21/21 03:45:47	05/21/21 03:45:47	4 hours, 46 min	2299019	0
347	05/19/21 23:00:02	05/20/21 03:59:31	05/20/21 03:59:31	5 hours, 0 min	2297205	0
346	05/18/21 23:00:02	05/19/21 04:11:34	05/19/21 04:11:34	5 hours, 12 min	2296455	0
345	05/17/21 23:00:02	05/18/21 04:33:26	05/18/21 04:33:26	5 hours, 34 min	2295975	0
344	05/16/21 23:00:01	05/17/21 05:42:45	05/17/21 05:42:45	6 hours, 43 min	2295450	0
336	05/09/21 02:00:02	05/09/21 15:22:49	05/09/21 15:22:49	13 hours, 23 min	2291519	0
335	05/08/21 02:00:02	05/08/21 13:45:10	05/08/21 13:45:10	11 hours, 46 min	2291419	0

AR Import

Spotlight on...Spotlights!

Aspen can generate book/item carousels that you can embed in your website.

You can use search filters or a manually created list to generate spotlights.

See them in action on the Nashville Public Library website.

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The screenshot displays a library website interface. At the top, there are three promotional banners: 'Vote for Your Favorites Today!', 'Salon@615 Special Edition: Sebastian Junger', and 'Think Summer Reading Challenge is Just for Kids?'. Below these is a 'New Materials' section with a carousel of book covers including 'The Hate U Give', 'Heart & Soul', 'GONGLE', and 'MILK & HONEY'. To the left of the carousel are search filters for FICTION, NONFICTION, CHILDREN, MOVIES & TELEVISION, and ON ORDER. Below the 'New Materials' section is a 'From the Blog' section with a carousel of blog post thumbnails, including 'A Pittance of Time', 'Time for Fashion', 'Bring on the Veggies - Plant-based', and '3 New Books by Women'. Navigation arrows are visible on both sides of the carousels.

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Build a Better Library Website Boot Camp

- Online course made possible in part by a 2020 award from the Catalyst Fund at LYRASIS.
- Available through the WebJunction Course Catalog for free.
- Covers design, project management, accessibility, and more

<https://learn.webjunction.org/course/search.php?q=Build+a+Better+Library+Website+Boot+Camp>

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EBSCO Group Purchase

Database selections have been sent to RAILS – thanks everyone for a smooth process!

By July 1 start of the subscription we will:

- Send a SWANcom with all database links
- Update database links on the patron site
- Update Article Search/EDS
- Update EBSCO Admin

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Statistics

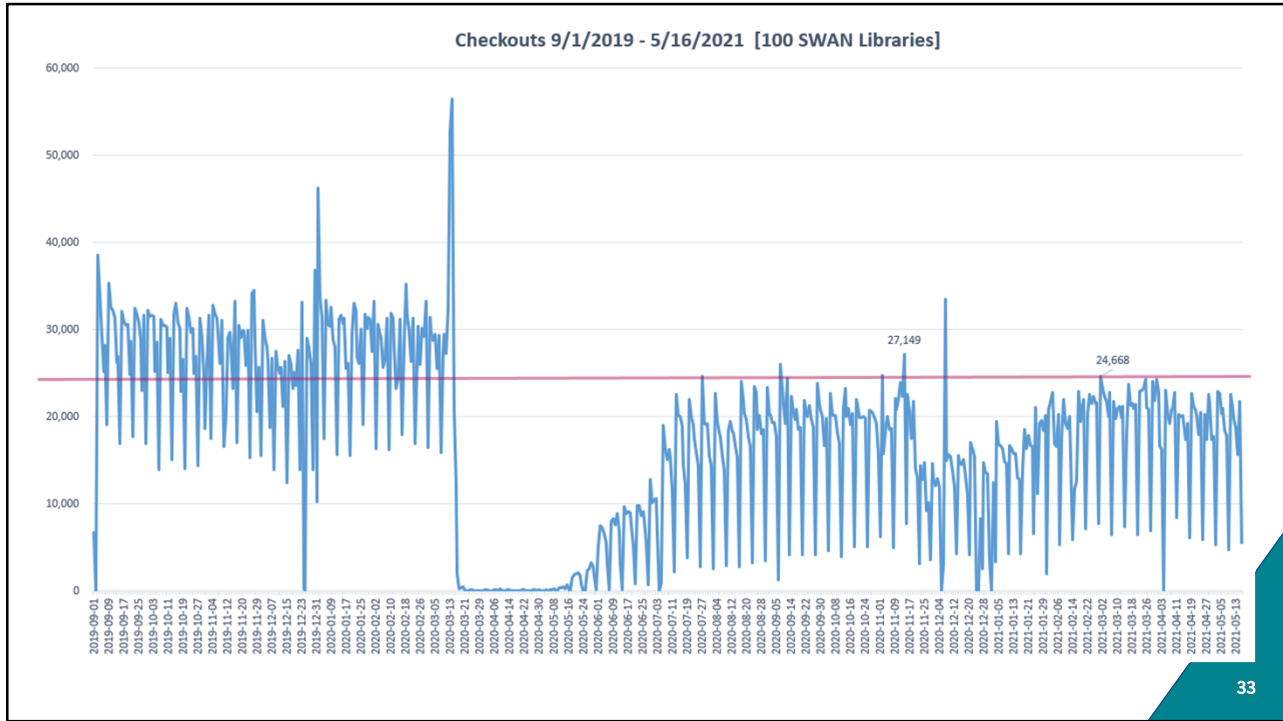
Note: These statistics and a few more are reported in the Monthly Operations Report, available online in the [monthly Board packet](#), publicly available.

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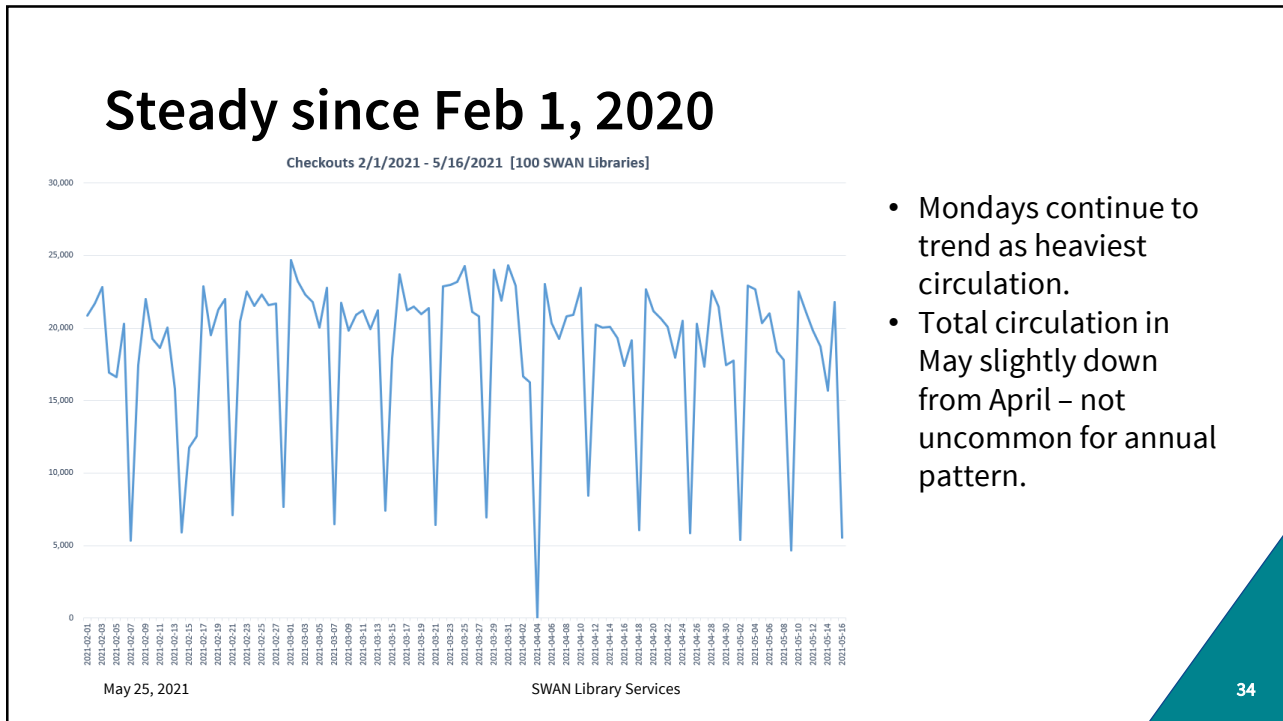
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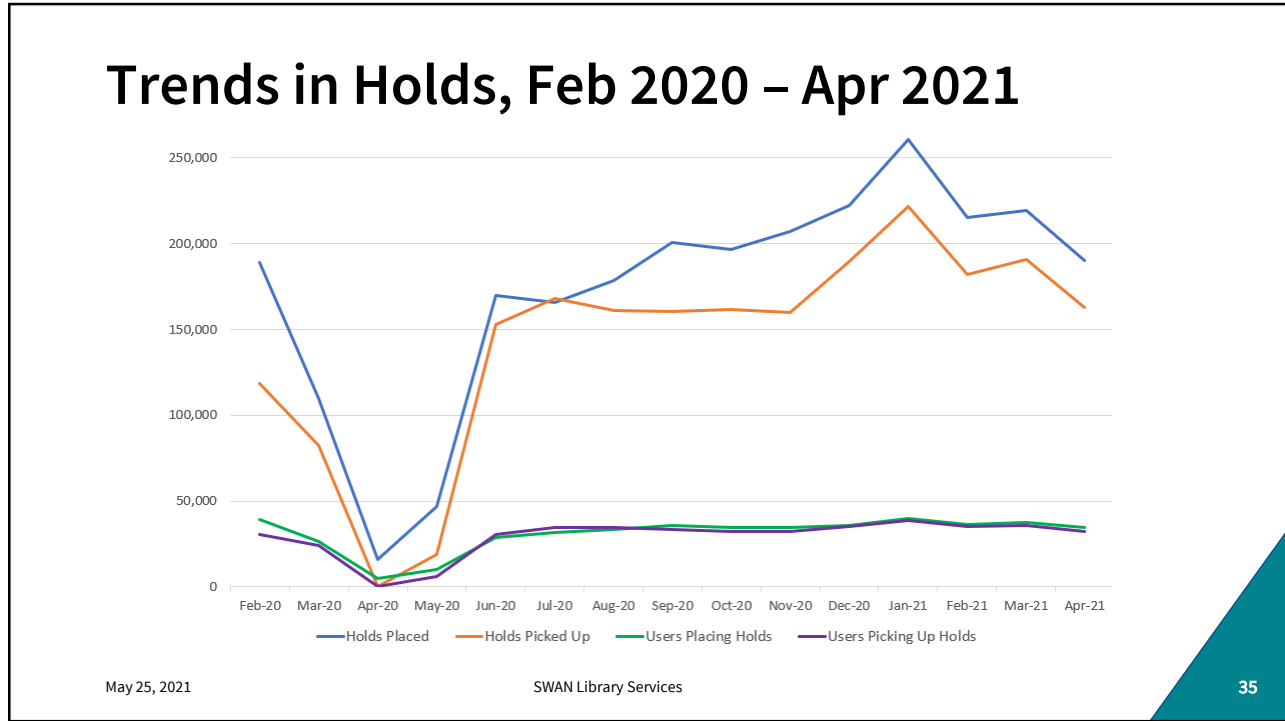
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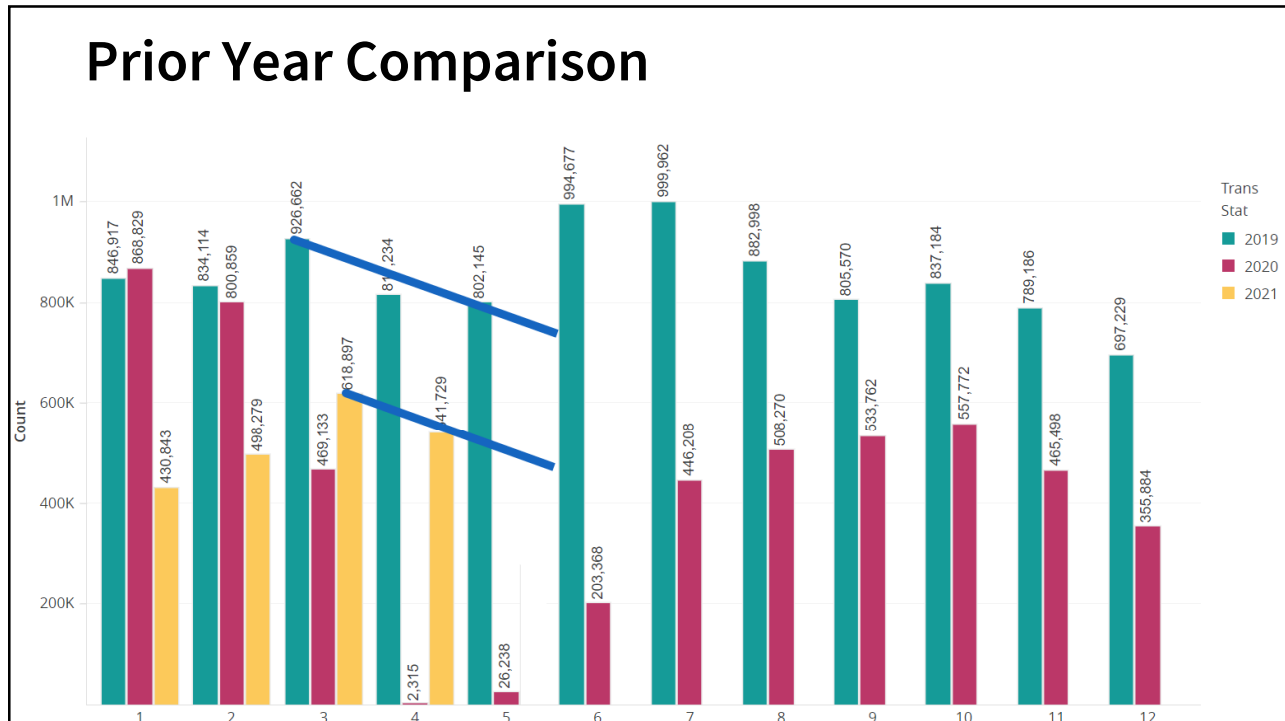
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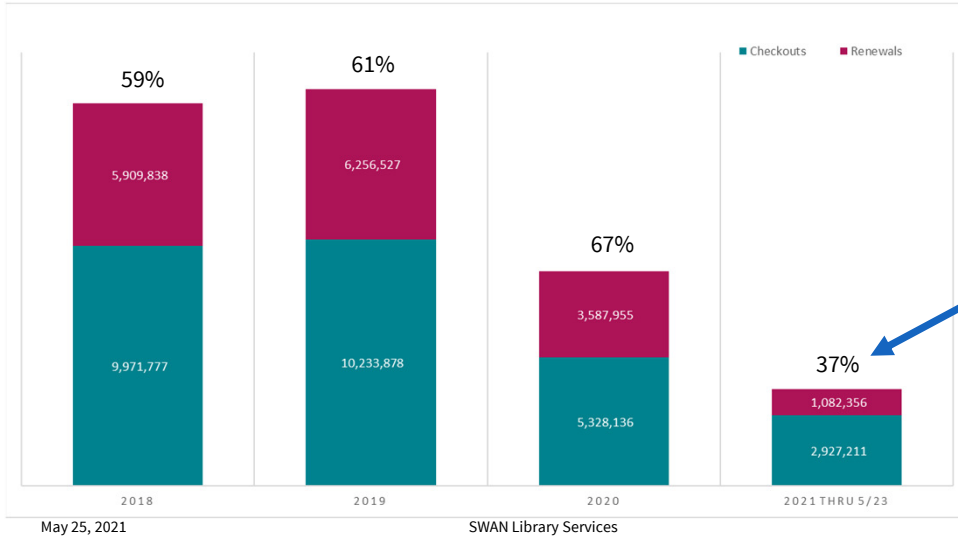


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Checkouts vs Checkouts & Renewals



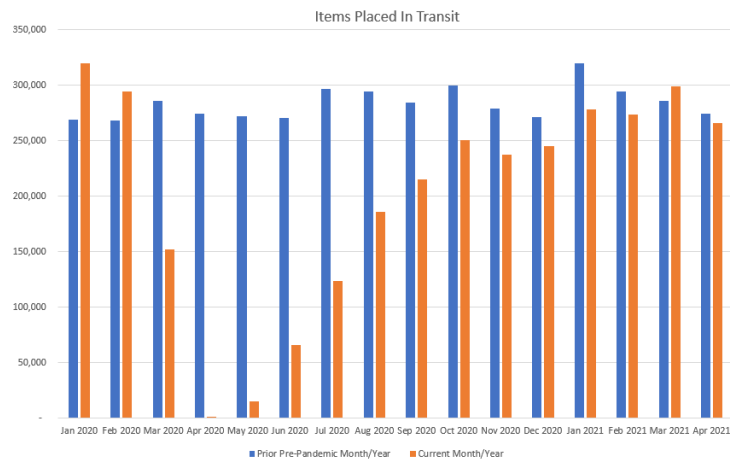
Not sure what this is telling us. Why such a dramatic drop in renewal percentage?

More popular materials that can't be renewed?

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2019 vs 2020/2021 Circulation & Transits

	Prior Pre-Pandemic Month/Year	rent Month/Year	% change
Jan 2020	269,481	320,142	19%
Feb 2020	268,464	294,829	10%
Mar 2020	286,066	151,830	-47%
Apr 2020	274,734	1,340	-100%
May 2020	272,468	15,287	-94%
Jun 2020	270,908	66,066	-76%
Jul 2020	296,871	123,522	-58%
Aug 2020	294,591	186,020	-37%
Sep 2020	284,312	215,022	-24%
Oct 2020	300,220	250,734	-16%
Nov 2020	279,280	237,628	-15%
Dec 2020	271,716	244,905	-10%
Jan 2021	320,142	278,152	-13%
Feb 2021	294,829	273,757	-7%
Mar 2021	286,066	299,023	5%
Apr 2021	274,734	266,376	-3%
Total	4,544,882	3,224,633	-29%



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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

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SWAN Directors' Meetings

Library Ideas for ARPA Funding – 5 SWAN Hosted Brainstorming Events

See: [News Post, May 18](#)

JUN 07

SWAN Directors' Meeting - Kane County Group
 GoToMeeting
 Event Type(s) Meeting
 Sponsor SWAN - System Wide Automation Network

JUN 07

SWAN Directors' Meeting - DuPage County Group
 GoToMeeting
 Event Type(s) Meeting
 Sponsor SWAN - System Wide Automation Network

JUN 08

SWAN Directors' Meeting - Cook County South Group
 GoToMeeting
 Event Type(s) Meeting
 Sponsor SWAN - System Wide Automation Network

JUN 08

SWAN Directors' Meeting - Cook County North Group
 GoToMeeting
 Event Type(s) Meeting
 Sponsor SWAN - System Wide Automation Network

JUN 10

SWAN Directors' Meeting - Will County Group
 GoToMeeting
 Event Type(s) Meeting
 Sponsor SWAN - System Wide Automation Network

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Directors' Coffee Hour

Register on L2:
June 11, 1-2 p.m.
August 13, 1-2 p.m.
October 15, 1-2 p.m.

Library membership benefits
Resource sharing
Annual fees
How SWAN Support works

These sessions are informal and not recorded.



Informal chance to talk with Aaron and fellow Library Directors

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Interactive Staff Trainings

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

Advanced Serials online training released.

Recent Training Recordings

[Training Recording: BLUEcloud Analytics for Directors](#)

Updated date: May 19, 2021

[Online Training: Advanced Serials](#)

Updated date: May 18, 2021

[SWAN100 Migration Training: Centralized Billing & Example Scenarios](#)

Updated date: May 18, 2021

[Training Recording: Introduction to the SWAN Notice Dialer](#)

Updated date: May 14, 2021

[Online Training: Demystifying Serials](#)

Updated date: May 13, 2021

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

Updated date: May 13, 2021

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Other Upcoming Meetings

• [See SWAN's events on L2](#)

 <p>May 27 SWAN ILL Boot Camp (Borrowing in WorldShare ILL) outtakeeting Event Type(s) Training Sponsor SWAN - System Wide Automation Network</p>	 <p>June 02 SWAN BLUEcloud Analytics Office Hour outtakeeting Event Type(s) Training Sponsor SWAN - System Wide Automation Network</p>	 <p>June 07 SWAN Directors' Meeting - DuPage County Group outtakeeting Event Type(s) Meeting Sponsor SWAN - System Wide Automation Network</p>
 <p>June 27 SWAN Discovery and User Experience Advisory outtakeeting Event Type(s) Meeting Sponsor SWAN - System Wide Automation Network</p>	 <p>June 03 SWAN Cataloging Users outtakeeting Event Type(s) Meeting Sponsor SWAN - System Wide Automation Network</p>	 <p>June 08 SWAN Circulation/ILL Office Hours outtakeeting Event Type(s) Training Sponsor SWAN - System Wide Automation Network</p>
 <p>June 01 SWAN BLUEcloud Analytics for Directors Series (Circulation activity and trends) outtakeeting Event Type(s) Training Sponsor SWAN - System Wide Automation Network</p>	 <p>June 03 SWAN Quarterly Meeting outtakeeting Event Type(s) Meeting Sponsor SWAN - System Wide Automation Network</p>	 <p>June 09 SWAN Cataloging Office Hours outtakeeting Event Type(s) Training Sponsor SWAN - System Wide Automation Network</p>
 <p>June 02 SWAN ILL Users outtakeeting Event Type(s) Meeting Sponsor SWAN - System Wide Automation Network</p>	 <p>June 07 SWAN Directors' Meeting - Kane County Group outtakeeting Event Type(s) Meeting Sponsor SWAN - System Wide Automation Network</p>	 <p>June 09 SWAN Directors' Meeting - Cook County South Group outtakeeting Event Type(s) Meeting Sponsor SWAN - System Wide Automation Network</p>

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Thank you!

Next Fireside Chat: June 29th – 11:00-12:00

<https://librarylearning.org/event/2021-06-29/swan-members-fireside-chat>

Register at GoToWebinar -

<https://attendee.gotowebinar.com/register/1230221980706466061>

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