SWAN Fireside Chat

June 29, 2021

1

Agenda

- Fine Free Update
- BLUEcloud Mobile App – Self Checkout
- Planning for Symphony 3.7.1 Upgrade
- New SWANcom
- SWAN Notice Dialer Update
- COVID-19 banners

- Patron record purge & NCOA
- Non-Resident Card Recap
- SOPPA – It's the Law!
- Pseudo Libraries
- Aspen
- Group Purchases
- Statistics
- Upcoming Events & Meetings

2

2

Fine Free Update

June 30, 2021 · SWAN Library Services · **3**

3

Fine Free Decisions & Numbers

September 1, 2021

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

- 38 libraries Fine Free
- 29 libraries Fine Free for Now

June 30, 2021 · SWAN Library Services · **4**

4

As of 6/27/2021 – Overdue Items/Users

2.21 Items/User

19,462

8,803

2.04 Items/User

6,959

3,414

2.01 Items/User

4,468

2,228

1.95 Items/User

142   73

>= 1 day   >= 15 days   >= 22 days   42 days

■ Items ■ Users

June 30, 2021   SWAN Library Services   5

5

Does blocking serve as incentive to return items?

Current checkouts ~522,000

Overdue 1+ days ~19,500

Overdue 15+ days ~7,000

Percentage: Items Checked Out & Overdue

>= 1 day   3.73%

>= 15 days   1.33%

>= 22 days   0.86%

42 days   0.03% (1 in 10,000 assumed lost/billed)

June 30, 2021   SWAN Library Services   6
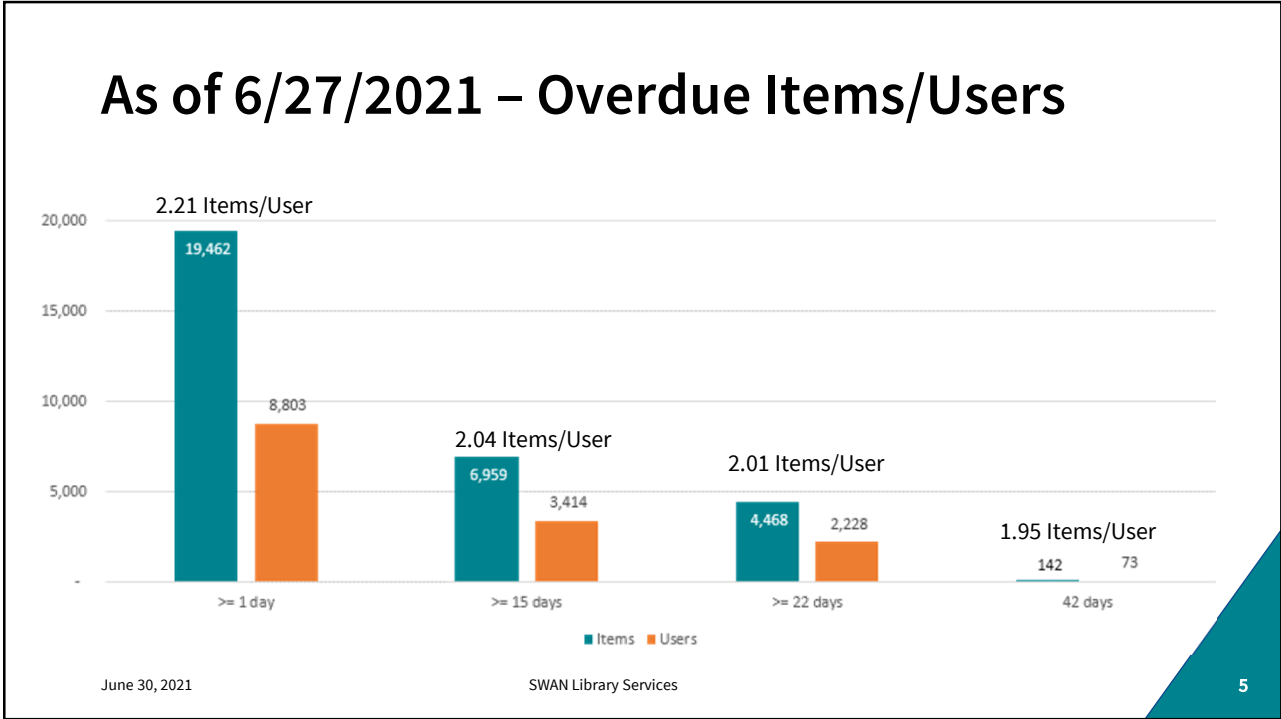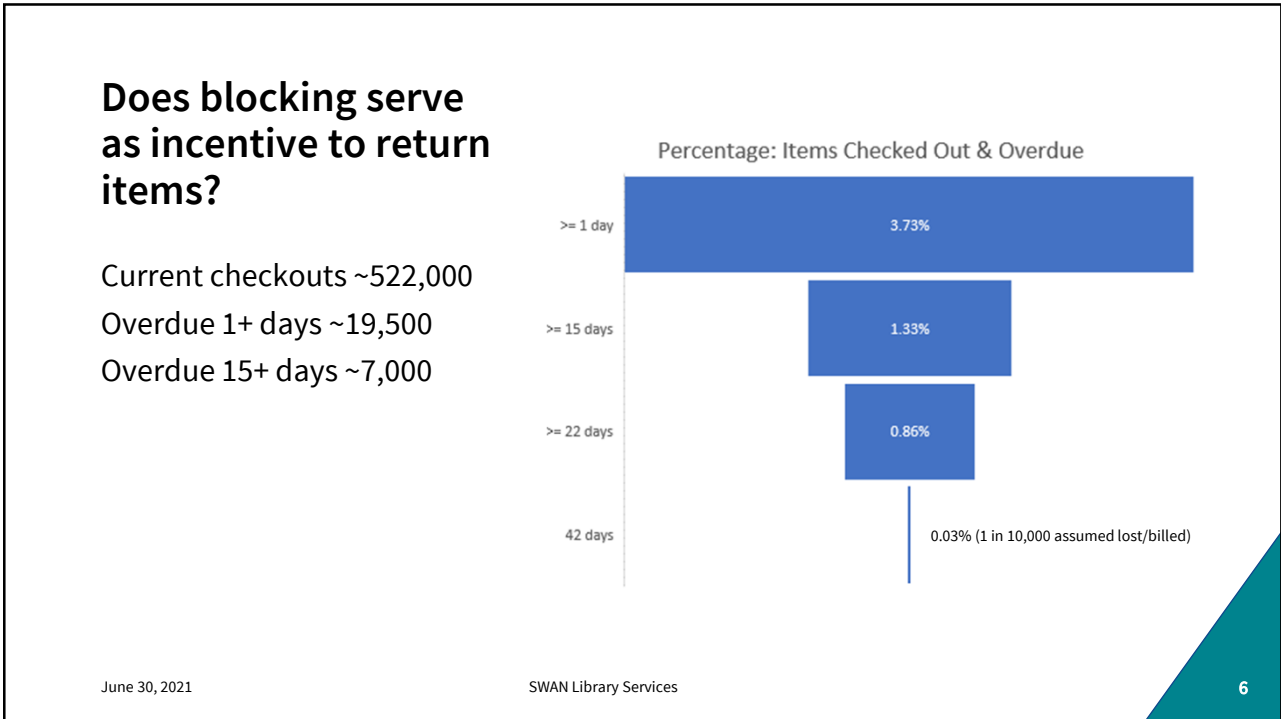
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Overdue Analysis Dossier

SWAN Reports > Circulation > Overdue Analysis

June 30, 2021 — SWAN Library Services — 7

7

Does blocking mostly serve as incentive to return –OR– create unpleasant patron experience?

	Patron Profile Limits	Nightly Overdue Time Period Block
Parameters	• 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	• Nightly job reviews any patrons with overdue items > 14 days checked out at your library; updates patron status to blocked
Patron Experience	• 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	• 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	• Home library patrons know limits and when to expect blocks to be applied • Patrons can balance return of material to manage blocks	• 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	• When limit is reached, patron is immediately blocked • Block is not cleared until number of overdue items falls beneath the limit	• 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	• 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	• Use in addition to a universal overdue limit if library wishes to block even with 1 item overdue for more than 14 days.

8

BLUEcloud Mobile App – Self Checkout

9

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
- Available now for all interested libraries
  - Watch for news post/announcement
  - Submit a support ticket
- 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
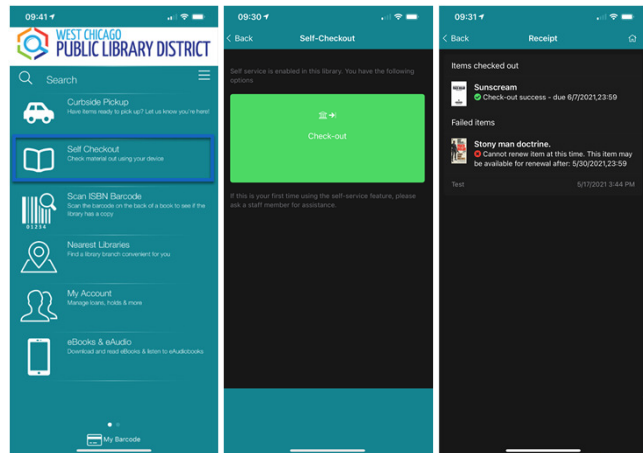
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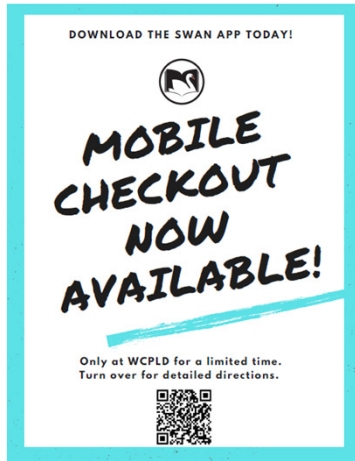
West Chicago Pilot

- West Chicago Public Library was our first pilot site
- Gabriel Cardenas and Marianne Kiel led the team at WCD
- Extensive staff testing window began the week of May 17
- Marketing material was created in-house in preparation for public use
- Public pilot began on Monday, June 7

June 30, 2021   SWAN Library Services   **11**

11

Marketing to Patrons

- West Chicago developed marketing material to announce new feature and provide instructions
- Short instructional video was produced for Facebook page
- Hand-out available to patrons with instructions on using Mobile Checkout

June 30, 2021   SWAN Library Services

12

Statistics

- Each member library participating in Mobile Checkout will have unique SIP2 ports and users
- As libraries begin using Mobile Checkout, we will create a statistical report in that library's shared folder in BCA
  - The standard "Checkouts by Interface" report will NOT differentiate Mobile Checkout statistics
  - Shared Reports -> SWAN Reports -> Library Specific Reports -> XXX

West Chicago Checkouts, 6/7 - 6/27	
WF	4392
Mobile Checkout	58

June 30, 2021 · SWAN Library Services · 13

13

Next Steps

Please open a support ticket if your library is interested in offering the Mobile Checkout service

SWAN Staff will assist in configuration of the module within the mobile app

Checkouts may be restricted by Item Type if desired

June 30, 2021 · SWAN Library Services · 14

14

Symphony 3.7.1 Upgrade

Scheduled for July 28th at 1:00AM

- Check the news post for complete details

WorkFlows client update will be required following upgrade

- Please inform your IT staff
- Client will be available during the week of the upgrade
- Client will be required for continued use of Manage Hold Shelf Wizard

Webinar on July 14th

- Register via L2 or catch the recording
- Discussion of benefits
- Review of installation process

June 30, 2021   SWAN Library Services   **15**

15

SWANcom (MailMan) Server Migration

Migration completed on **June** 23rd

Visit **mailman.swanlibraries.net f**or access to lists, subscription settings, and archives

Expect SWANcom emails from SWAN Communications**:** swancom@list.swanlibraries.net

- Please whitelist this address/domain if you haven't already

June 30, 2021   SWAN Library Services   **16**

16

SWAN Notice Dialer

- Please submit your CALLER ID requests by the end of July to help@swanlibraries.net!
- Common issues: Comcast digital voice incompatibility
- 5,936 total holds for June, 5710 successful and 226 failed (96% success rate)
- 737 total overdues for June, 691 successful and 46 failed (93% success rate)
- Watch for emails from Unique with daily failed call statistics
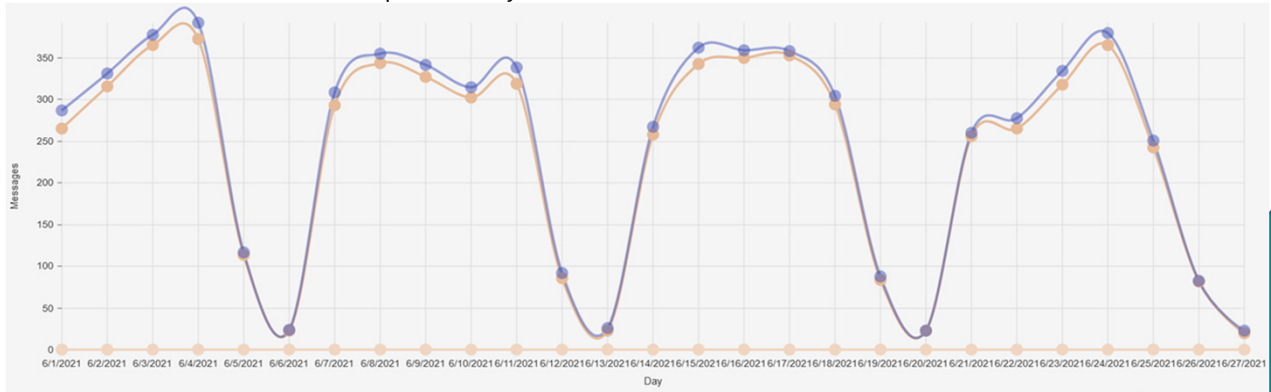
17

Enterprise COVID-19/Library Service Banners

All default banners have been removed

- "Curbside pickup and other library services are available in a limited capacity. You can now request items from participating libraries for pickup at your home library. Please contact your home library for further details."

Proposed removal of custom banners pertaining to pandemic services by July 13th

- Banners relating to library renovation, moves, or other non-pandemic messaging will remain
- **To retain your banner, please submit a help ticket**

64 libraries are currently using custom banners

June 30, 2021   SWAN Library Services   **18**

18

Patron Record Purge & Bill Clean-up

See:
News Post 5/17
SWAN Community Forums
June Quarterly Discussion

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

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

On target for updating Last Activity Dates from OpenAthens access in past year during July. Proceeding with removal of long-standing bills > 10 years old

June 30, 2021 · SWAN Library Services · 19

19

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

June 30, 2021 · SWAN Library Services · 20

20

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)

June 30, 2021   SWAN Library Services   21

21

Timeline Targets

- Update Last Activity Date
- Review/remove bills
- Allow library to review/update patron records
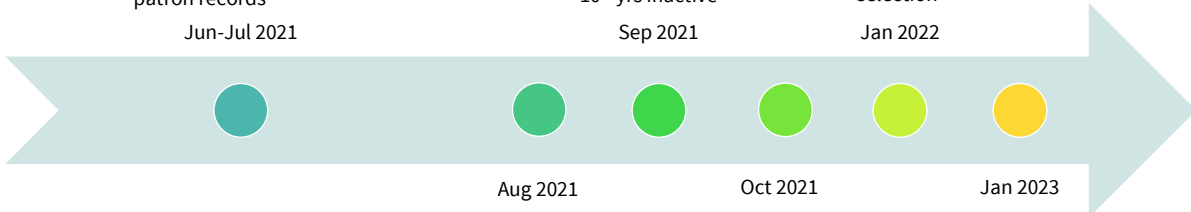
Jun-Jul 2021

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

June 30, 2021   SWAN Library Services   22

22

Slide 23

Non-Resident Cards

Reporting to IPLAR

16.2 Number of Non-resident Cards

User Library	User Attribute Category3	CARDS4KIDS	NONRESIDENT	VETERAN_NF
Blue Island Public Library	Number of Users		1	
Batavia Public Library District	Number of Users		2	
Berwyn Public Library	Number of Users		1	
Calumet City Public Library	Number of Users		101	
Clarendon Hills Public Library	Number of Users		21	
Carol Stream Public Library	Number of Users		29	
Crestwood Public Library District	Number of Users		53	
Downers Grove Public Library	Number of Users		200	
Elmwood Park Public Library	Number of Users		1	
Forest Park Public Library	Number of Users		1	
Glen Ellyn Public Library	Number of Users	7	8	
Green Hills Public Library District	Number of Users		4	
Grande Prairie Public Library District	Number of Users		17	
Geneva Public Library District	Number of Users		6	
Glenwood-Lynwood Public Library District	Number of Users		1	
Hinsdale Public Library	Number of Users		4	
Hodgkins Public Library District	Number of Users		5	
Hillside Public Library	Number of Users		2	

June 30, 2021 — SWAN Library Services — 23

23

Slide 24

Non Resident Card Recap

Cards for Kids
- No Fee
- Profile = library patron profile
- User Cat3 = CARDS4KIDS
- Expiration Date = 1 year from registration

Disabled Veterans
- No Fee
- Profile = library patron profile
- User Cat3 = VETERAN_NF
- Expiration Date = 1 year from registration

Paying Non Resident
- Fee based on participation
- Profile = library patron profile
- User Cat3 = NONRESIDENT
- Expiration Date = 1 year from registration

June 30, 2021 — SWAN Library Services — 24

24

Illinois Administrative Code Amendments

3050.45 E-Resources to Non-Residents

"The public library board of trustees may annually take action to offer nonresidents access to E-Resources, free of charge."

SWAN Policy Recommendations:

- Create user profile NONRESDIG
  - Hold Limit = 0
  - Checkout Limit = 0
  - Expiration = 1 yr
  - Access to databases
  - Challenge: e-books, e-audiobooks, streaming
- Registration must be manual process by library to ensure adherence to closest public library offering such cards is followed
- As SWAN libraries currently issue nonresident library cards (See https://www.railslibraries.info/node/116813) nonresidents are afforded opportunity to E-Resources through existing nonresident card purchase based on formulas and service areas.

25

25

Illinois Administrative Code Amendments

3050.60 Non-Resident Fee Formula (Disabled Veterans)

"Veterans with a service-connected disability of at least 70% who are exempt from paying property taxes on their primary residence, shall not be charged a non-resident fee."

SWAN Policy Recommendations:

- Current library practice in place for issuing non-resident cards is followed
- No fee collected
- When registering a non-resident, eligible for payment exemption veteran, code:
  - User Category 3/Patron Type = VETERAN_NF

26

26

Illinois Administrative Code Amendments

3050.75 Cards for Kids program

The program is intended to provide library cards for students (K-12) who live in an unserved area. To qualify:

1. Student's principal residence is not within a public library service area
   -and

2. Student is eligible for free or reduced-price lunches under National School Lunch Program

SWAN Policy Recommendations:

- Current library practice in place for issuing non-resident cards is followed
- No fee collected
- When registering a non-resident, eligible for payment exemption Cards for Kids, code:
  - User Category 3/Patron Type = CARDS4KIDS

Libraries need to:

1. Verify student is in unserved area and is applying at closest public library.

2. Verify eligibility for free or reduced-price lunch (student must provide documentation from school/district)

27

27

SOPPA

Student Online Personal Protection Act

Effective July 1, 2021

- School districts are required to provide guarantees that student data is protected when collected by educational partners

- SWAN has a National Data Privacy Agreement, IL Version (NDPA_IL) in place with Bensenville School District #2

- Public libraries collecting student data without parent authorization will need to work with SWAN and school district to file NDPA-IL

June 30, 2021

SWAN Library Services

28

28

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

Documentation on Support Site:
https://support.swanlibraries.net/documentation/86733

June 30, 2021 SWAN Library Services 29

29

What to do with transits to a Pseudo Library?

- Format transit label as indicated on WorkFlows Route/Transit window

- RAILS Delivery will route to main library

June 30, 2021 SWAN Library Services 30

30

15
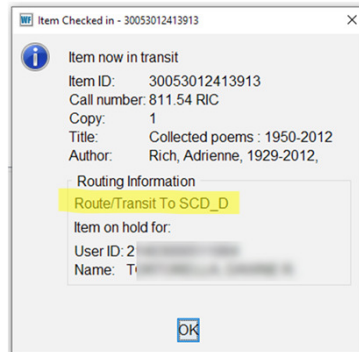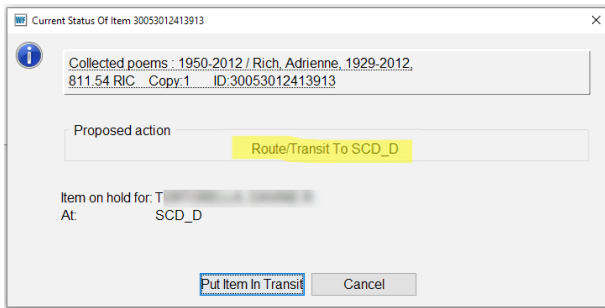
Aspen Pilot Go-Live

June 30, 2021

The Aspen pilot libraries are going live!

- Chicago Ridge, July 7th
- Downers Grove, July 14th
- Oak Brook, July 7th
- Oak Park, July 12th
- St. Charles, July 7th
- Villa Park, July 7th

SWAN Library Services

31

31

Aspen Rollout

Coming soon!

June 30, 2021

We will schedule a kickoff date for the first cohort following:

- Fines payment integration
- Period of observation for the pilot libraries, to make sure Aspen is stable and ready for us to open the floodgates

SWAN Library Services

32

32

Aspen Trainings

⏱	4 pre-recorded all-staff trainings	30-45 minutes, **all staff**
🖥	5 webinars for Aspen Admins	**1 hour, admins only**
🐕	Bi-weekly Aspen office hours	**Open to all**

33

How do I learn more?

Library staff documentation

On the support site, under
Documentation > Discovery >
Beta Catalog (Aspen)
- Learn more about staff functions
- Find your catalog link

Patron site documentation

On the patrons site at
https://swanlibraries.net/using-the-new-catalog/
- Basics of using Aspen from a patron perspective

34

Kanopy and Reference Solutions

Kanopy is offering SWAN libraries a pay per use discount

Sign up on L2 to learn more

https://librarylearning.org/event/2021-07-21/kanopy-demonstration-swan-member-libraries

Reference Solutions is offering SWAN libraries a discount on a group purchase.

Detailed pricing and option to participate coming in July.

June 30, 2021   SWAN Library Services   35

35

EBSCO Group Purchase

If you participated in the group purchase, you will get your links on **July 1st.**

Between now and then SWAN and/or EBSCO will:

☑ Update database links on the patron site

❑ Update Article Search/EDS in your catalogs

June 30, 2021   SWAN Library Services   36

36

Statistics

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

SWAN Library Services   **37**
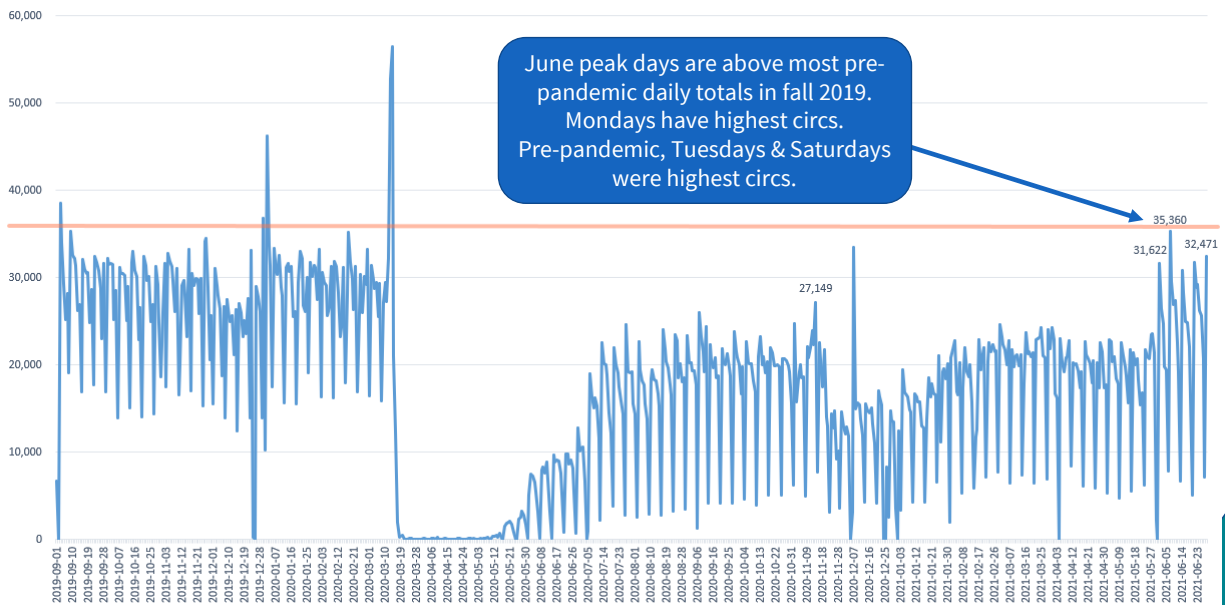
37

Checkouts 9/1/2019 - 6/28/2021 [100 SWAN Libraries]

June peak days are above most pre-pandemic daily totals in fall 2019. Mondays have highest circs. Pre-pandemic, Tuesdays & Saturdays were highest circs.
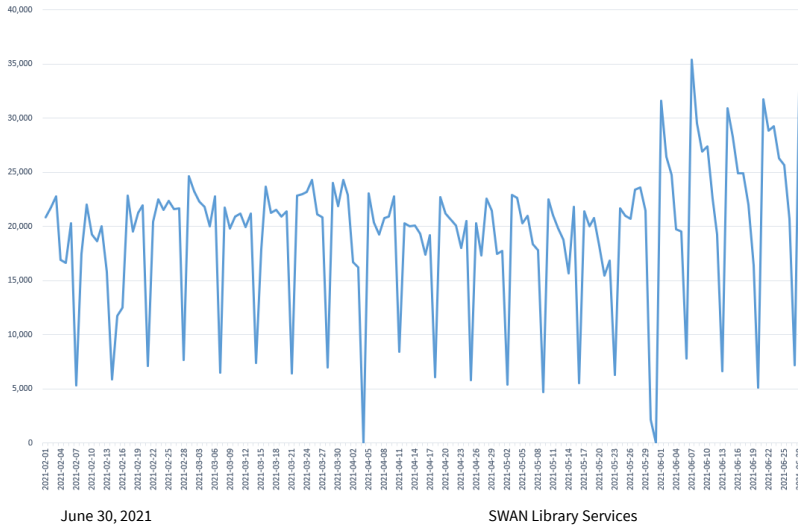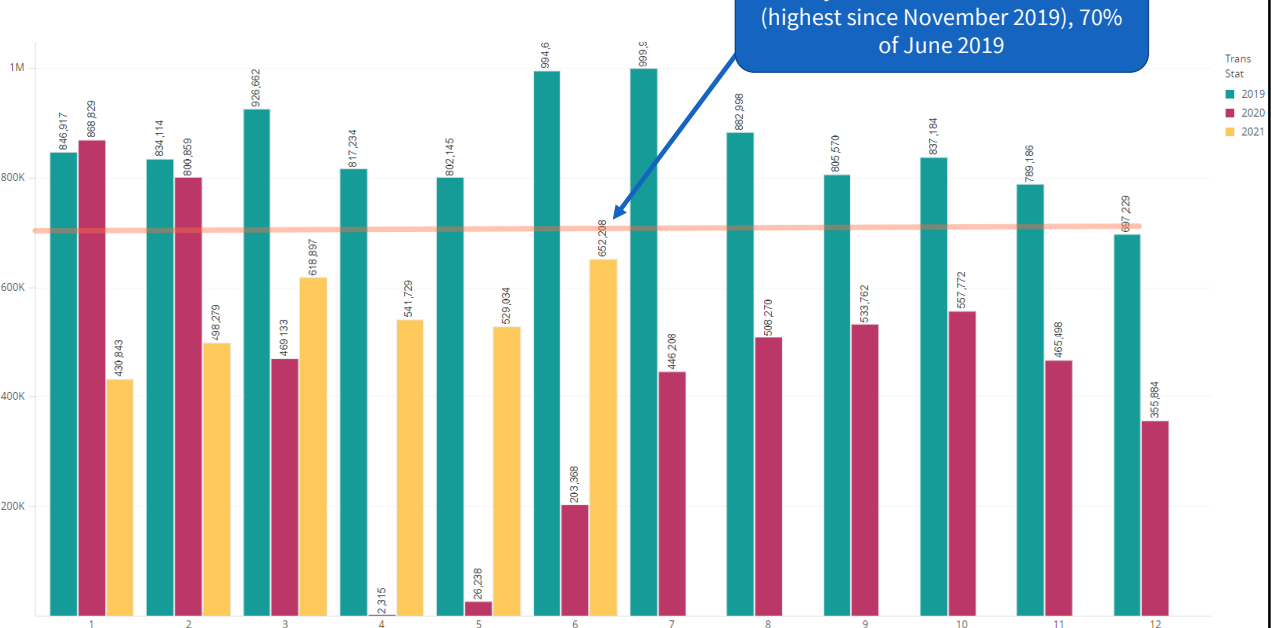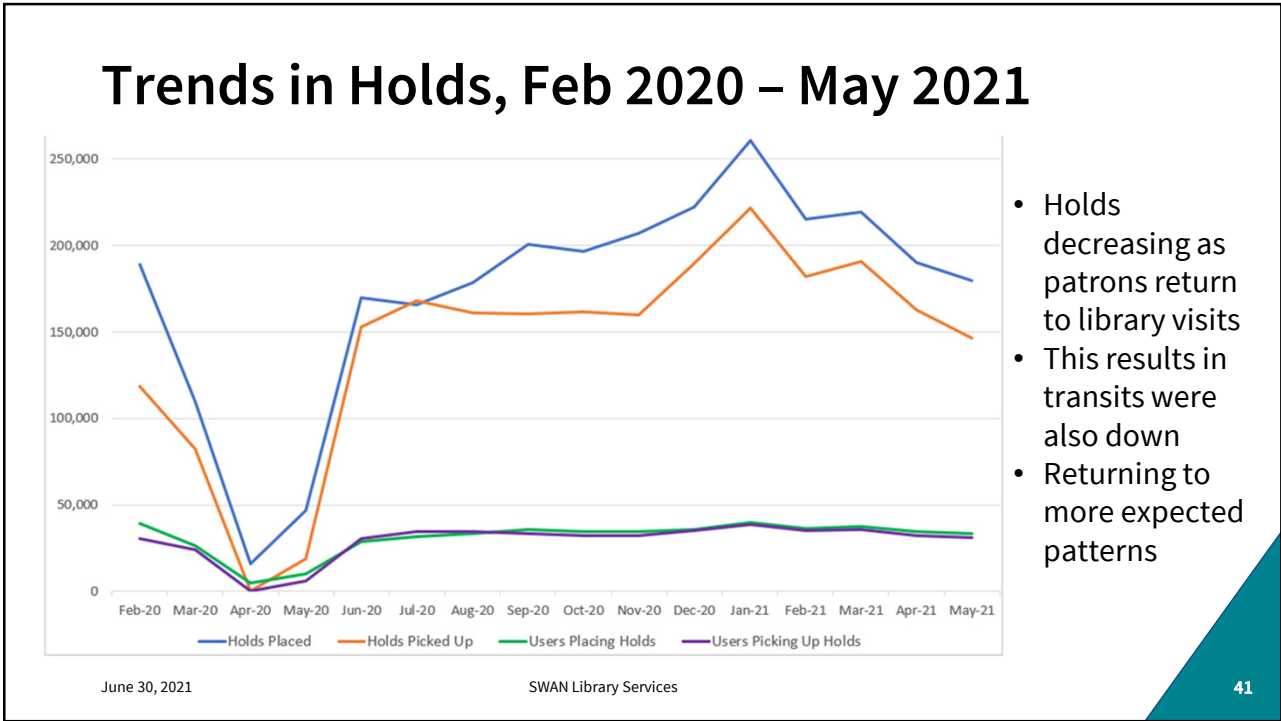
38

Steady since Feb 1, 2021

Checkouts 2/1/2021 - 6/28/2021 [100 SWAN Libraries]

- Mondays continue to trend as heaviest circulation.
- June peaks show impact of summer reading

June 30, 2021   SWAN Library Services   **39**

39

Prior Year Comparison

Projected June 2021 – 698,794 (highest since November 2019), 70% of June 2019

40

Trends in Holds, Feb 2020 – May 2021

- Holds decreasing as patrons return to library visits
- This results in transits were also down
- Returning to more expected patterns

June 30, 2021   SWAN Library Services   41

41

Checkouts vs Checkouts & Renewals

Returning to pre-pandemic checkout/renewal percentage.

Was at 37% for 2021 through 5/23

57.99% through 6/27

June 30, 2021   SWAN Library Services   42

42

Other Upcoming Meetings

See SWAN's events on L2

SWAN ILL Boot Camp (Policies)
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 Book Club Users
GoToMeeting
Event Type(s): Meeting
Sponsor: SWAN - System Wide Automation Network

SWAN Discovery and User Experience Advisory
GoToMeeting
Event Type(s): Meeting
Sponsor: SWAN - System Wide Automation Network

SWAN Cataloging Office Hours
GoToMeeting
Event Type(s): Training
Sponsor: SWAN - System Wide Automation Network

SWAN Member Update: Symphony/WorkFlows 3.7.1
GoToMeeting
Event Type(s): Training
Sponsor: SWAN - System Wide Automation Network

SWAN Board Meeting
GoToWebinar
Event Type(s): Meeting
Sponsor: SWAN - System Wide Automation Network

SWAN BLUEcloud Analytics Office Hour
GoToMeeting
Event Type(s): Training
Sponsor: SWAN - System Wide Automation Network

SWAN Circulation Advisory
GoToMeeting
Event Type(s): Meeting
Sponsor: SWAN - System Wide Automation Network

SWAN Members Fireside Chat
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

Kanopy Demonstration – SWAN Member Libraries
Zoom
Event Type(s): Webinar
Sponsor: SWAN - System Wide Automation Network

Diversity Audits: Sharing and Panel Discussion
GoToMeeting
Event Type(s): Meeting, Discussion
Sponsor: SWAN - System Wide Automation Network

43

43

Thank you!

Happy 4th of July! SWAN Offices will be closed on Monday, July 5th, but we will be monitoring systems.

Next Fireside Chat:
July 27th – 11:00-12:00

Register at GoToWebinar -
https://attendee.gotowebinar.com/register/5617864912788465421

44

44