



SWAN Fireside Chat

July 27, 2021

Agenda

- Symphony 3.7.1 Upgrade (tomorrow morning!)
- Recap of September 1st Changes
- Fine Free Update
- Patron Record Purge, NCOA
- Pseudo Libraries
- Teacher Cards
- Console Game Limits
- Diversity, Equity, Inclusion (DEI)
- Aspen Update
- E-Resources
- ARPA Grants from State Library
- ILLINET Traffic Survey & Delivery Counts
- Upcoming Events & Meetings

Symphony 3.7.1 Upgrade, WorkFlows Client Update

Symphony server upgrade July 28th at 1:00AM

- Check the [news post](#) for the latest info and complete details
- We'll post an "all clear" to the news post when the upgrade is complete

WorkFlows staff client must be updated by August 30th

- Please inform your IT staff
- Client update is now available in the [Software Downloads & Setup](#) section of the support site
- **Important: Early installation (before server has been upgraded) will cause compatibility issues**
- **Important: Updated client will be required for continued use of Manage Hold Shelf Wizard**

Catch Up on the Webinar from July 14th

- Watch the [online recording](#)
- Discussion of benefits
- Review of installation process

Reminder for September 1st Policy Changes

- Completed:

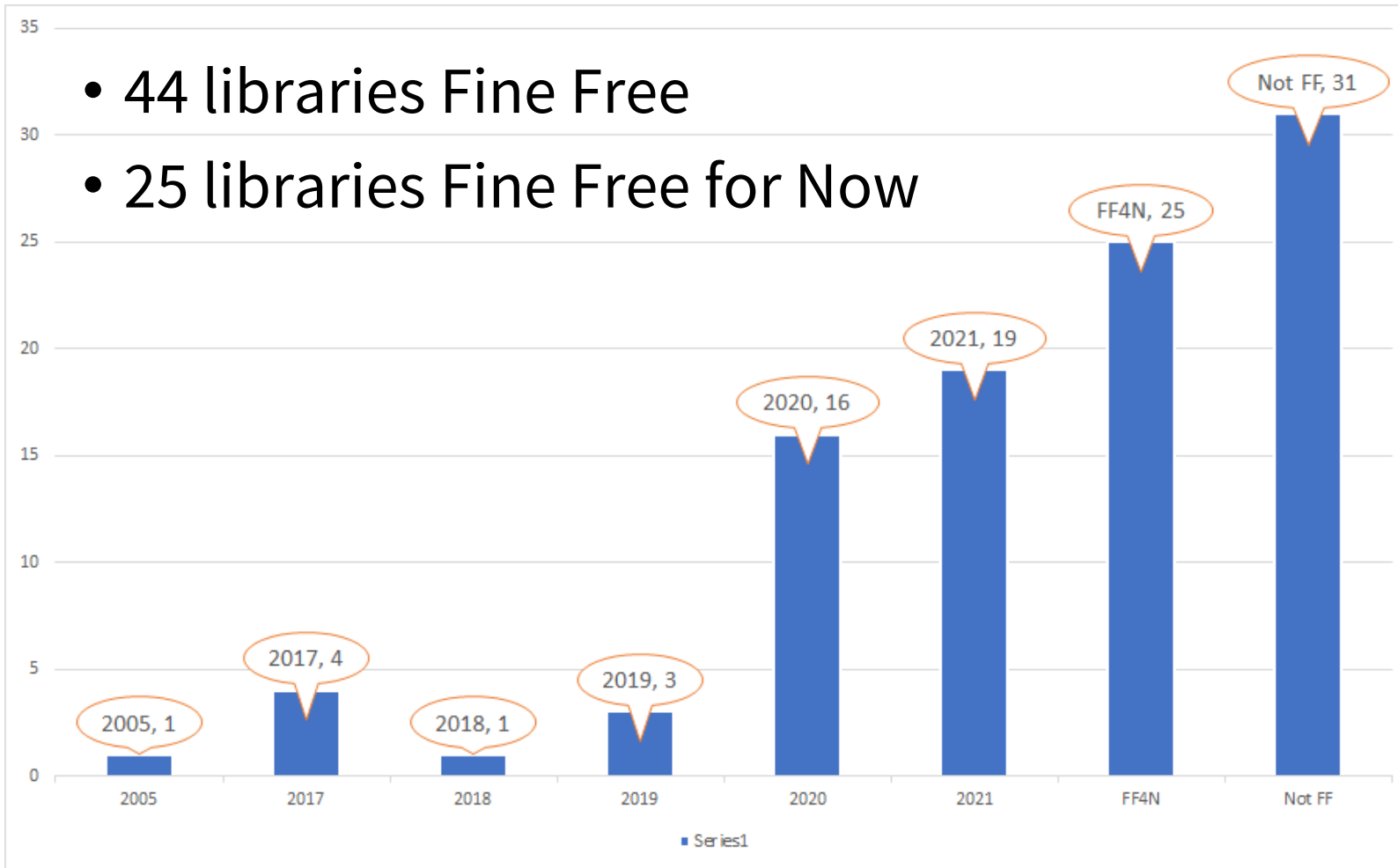
- ✓ Elimination of print overdue notices – now only sent via text, voice message, or email
- ✓ Consolidation of hold pick-up notices and accommodation for pseudo-library hold pick-up notices (sent once a day around 2:00 PM)
- ✓ Return to pre-pandemic notice wording
- ✓ Return to pre-pandemic grace periods
- ✓ Default SWAN processing fee set to \$0, current default is \$5
- ✓ COVID related online catalog banners removed
- ✓ Flexibility in blocking for Fine Free based on criteria of library choice

- Scheduled:

- Libraries Fine Free For Now – decide on pre-pandemic or Fine Free rules (September 1)
- Reinstate 90-day removal of temporary patron records created through Online Patron Registration that have not been reviewed and updated/extended by home library (September 1)
 - Please see our support site [news post](#)

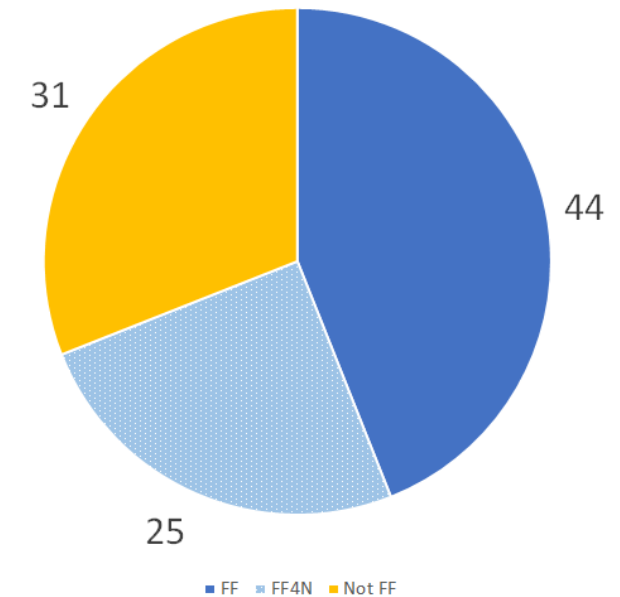
Fine Free Decisions & Numbers

- 44 libraries Fine Free
- 25 libraries Fine Free for Now



September 1, 2021

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



Action Needed: Fine Free For Now Options by September 1st

- Option 1 / Sept 1 default:
Return to your pre-COVID
circulation rules

If you choose to return to your pre-COVID circulation rules on September 1st, no further action is needed. If you would like to return to your pre-COVID circulation rules before September 1st, please email help@swanlibraries.net so we can schedule your transition.

- Option 2: Move to Fine Free permanently

If you are contemplating a permanent move to Fine Free, we can provide reports to assist in your decision. You can find more information about this on the [Fine Free Configuration](#) page of the SWAN Support Site.

Patron Record Purge

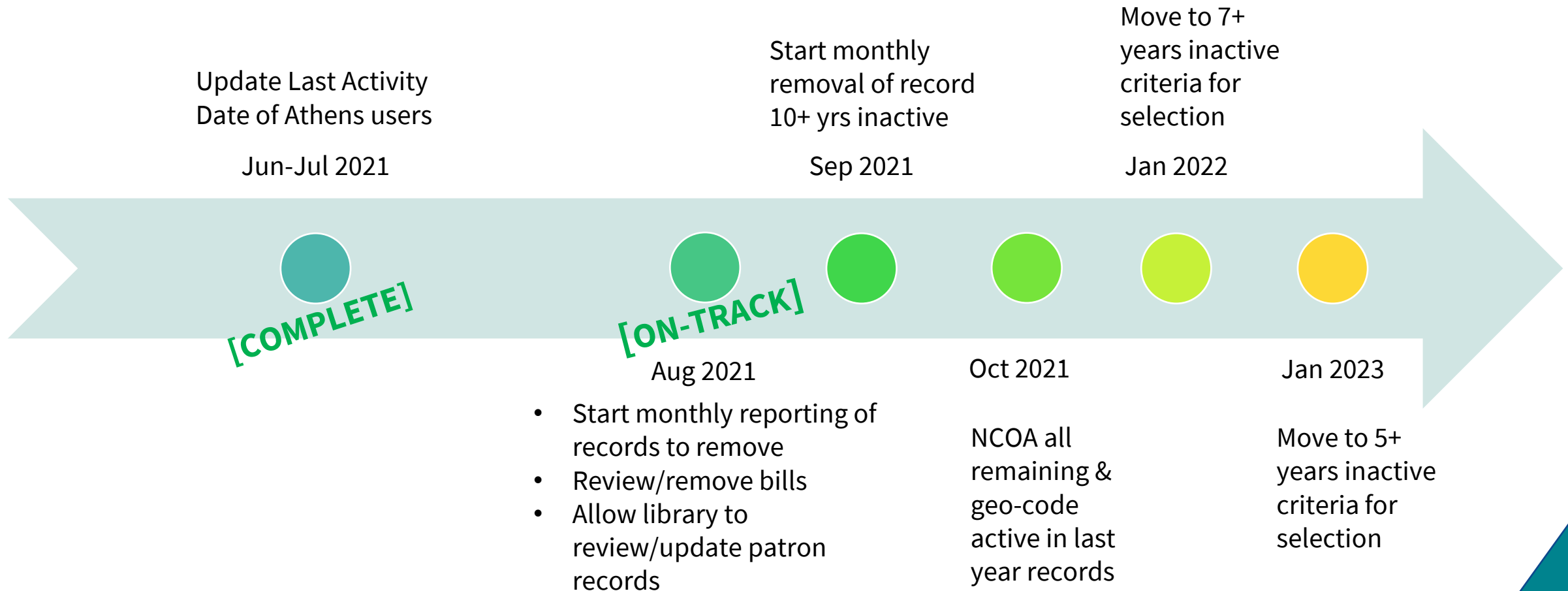
Purge criteria

- 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~~ **\$100**
- LAD before 1/1/2011; bills \$10.01-~~\$200~~ **\$100 (regardless of status)**
- ~~LAD before 1/1/2018; bills <=\$10 (regardless of status)~~

Patron Record Purge: Timeline Targets



Pseudo-libraries

- 3 pseudo libraries are now live!
- 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 – Coming soon!
INS_D	Indian Prairie Public Library District Drive-up Window
OPS_LI	Oak Park Public Library Main Branch Indoor Locker – Coming soon!
OPS_LO	Oak Park Public Library Main Branch Outdoor Locker – Coming soon!
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>

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

WF Current Status Of Item 30053012413913

Collected poems : 1950-2012 / Rich, Adrienne, 1929-2012,
811.54 RIC Copy:1 ID:30053012413913

Proposed action
Route/Transit To SCD_D

Item on hold for: T
At: SCD_D

Put Item In Transit Cancel

WF Item Checked in - 30053012413913

Item now in transit

Item ID: 30053012413913
Call number: 811.54 RIC
Copy: 1
Title: Collected poems : 1950-2012
Author: Rich, Adrienne, 1929-2012,

Routing Information
Route/Transit To SCD_D

Item on hold for:
User ID: 2
Name: T

OK

Teacher Cards

General guidelines

- Public library and school/district may have an IGA
- If no IGA in place, library registering teacher is financially responsible for losses
- Cannot be used to circumvent residency. Teacher must have a pre-existing valid public library card in the SWAN patron database (either a SWAN library or a reciprocal borrower).
- Local decision on whether SWAN public libraries want to issue or not.

Teacher card registration

- Valid for the school year, expiring on 8/15/22 for school year '21-22
- User Profile = TEACHER
- Library = Library issuing the card for teachers in the library's service area
- Circulation rule – follows library's default rules unless additional rule requested.
- School contact information is in Address 1, including School name
- Personal contact information is in Address 2 (Primary)

Console Game Limits

Console Games are now limited to 5 items per item type.

For Example: A patron can checkout

- 5 CONSOLEGAM
- 5 CONSOLENEW

SWAN will be reaching out to any libraries cataloging console games with an item type other than CONSOLEGAM or CONSOLENEW so the system can work properly.

Please see our [News Post](#)

Chapter 1 : Count of Users > 5 by Library

Users with Total Console Games Checkouts > 5

User Library	User Barcode	Row Count
Batavia Public Library District	Count	2
	26173	9
	26173	6
Beecher Community Library District	Count	1
	20304000081283	9
Berwyn Public Library	Count	6
	22957	20
	22957	7
	22957	7
	22957	7
	22957	6
Bloomingdale Public Library	Count	1
	2153	6
Broadview Public Library District	Count	1
	21314	35
Brookfield Public Library	Count	5
	20056	14
	20056	11

DEI Task Force Update

Subject heading changes

Future plans

Diversity audit discussion

- Subject headings updated to replace the terms
 - Aliens
 - Illegal aliens
- Further subject headings under consideration
 - But we'll need your input.
- Reaching out to have this discussion on a larger scale

Diversity Audit Discussion

- Group discussion and information gathering session.
- Topics include goals, needs, benchmarks, and what we are currently working on.
- Wednesday, July 28th
9:30-11:30
- Registration on L2:

<https://librarylearning.org/event/2021-07-28/diversity-audits-sharing-and-panel-discussion>

Sign Up for your Aspen Cohort!

Information and sign up on the SWAN support site.

First Cohort

- Go live October 2021
- Training August 30-October 12

Second Cohort

- Go live March 2022
- Training January - March

First Cohort Schedule

DATE	WHAT
August 30th, 2021	Kickoff Meeting
Every other Monday, 10 a.m.	Aspen office hours
September 7th, 2021 11 a.m.	Aspen Admin Training: Themes & Library Settings
September 14th, 2021 11 a.m.	Aspen Admin Training: Browse categories, Spotlights, & Adding Covers
September 21st, 2021 11 a.m.	Aspen Admin Training: Placards & System Messages
October 5th, 2021 11 a.m.	Aspen Admin Training: Record Grouping
October 12th, 2021 11 a.m.	Aspen Admin Training: Purchase Suggestions
October 18th-29th, 2021	Go live

Aspen Staff Roles & Permissions

Start thinking now about who will do what!

If you have limited staff, you may want to only use the OPAC Reference and OPAC Administrator permissions.

Primary Aspen contact

- Must be at the kickoff meeting

OPAC Administrator

OPAC Public & Tech Services

OPAC Cataloging

OPAC Administrator

<https://support.swanlibraries.net/documentation/82481>

Get ready!



Find your [catalog link](#)



Browse the [Aspen documentation](#)



View the [Aspen All Staff Trainings](#)

E-Resources Update

Kanopy:

Offering SWAN libraries a discount, see more info at:

<https://support.swanlibraries.net/news/2021-07/87199>

Reference Solutions:

We did not work out a discount for this year but Bob Zielinski, Bob.Zielinski@data-axle.com is willing to work with libraries individually.

New York Times:

If you have a subscription and would like to offer authentication, we have an in-house method that utilizes the patron site.

American Rescue Plan Act (ARPA) funding

**SWAN hosted discussions in June with
5 meetings, 15 libraries attended**

Summary of need

1. Improve community access to broadband
2. Address mobile technology needs
3. Support flexible programming & events
4. Support expanded collection development
5. Support for flexible & evolving space needs
6. Support for evolving staff, improving skills, & revising organization roles

Possible solutions/ideas

- Circulate a shared collection of hotspots for all 100 libraries or a library group(s) within SWAN
- Acquire mobile laptop equipment for libraries
- Universal access card
- Centralized ordering of book collections
- Provide human resources help for libraries to retool employee positions
- Mobile workforce redesign

Illinois State Library Grants: announced 7/15

Expanding Digital Inclusion: Transforming Library Services

- Focuses on devices and technologies that circulate to meet the needs of an identified target audience in response to and recovery from the pandemic.
- Academic, public, school and special libraries are encouraged to reach patrons with enhanced digital inclusion efforts focused on circulating internet hotspots, laptops, and other devices to help patrons recover from the pandemic.
- This offering is NOT for books or electronic subscriptions.
- Requests ranging from \$5,000 to \$30,000 per library building or branch location will be considered, with one application accepted per agency.
- **Applications are due August 15, 2021**

Bouncing Back from the Pandemic: Developing Resources for the Local Workforce

- Provides funds from the American Rescue Plan Act of 2021 (ARPA) to support libraries in providing essential resources and services to those seeking employment.

- Libraries may also establish and design workforce recovery programming and services that will impact the intended target audience.
- To assist libraries in providing resources to their local workforce, public library and academic library agencies may apply for \$5,000 to \$50,000 to expand the library's current technology, equipment, and related materials.
- **Applications are due August 15, 2021**

On the Road to Recovery: Transforming Library Spaces

- Offering provides emergency relief and support to academic, public, school and special libraries as library spaces are modified in response to and recovery from the pandemic.
- This offering focuses on restoring the library's capacity to operate and creating clean, safe spaces in the library for patrons during and after reopening.
- The goal is to prioritize health and safety while taking progressive steps that best fit individual reopening plans and restore regular library operations.
- Requests ranging from \$5,000 to \$25,000 per library building or branch location will be considered, with one application accepted per agency.
- **Applications are due August 15, 2021**

American Rescue Plan Act (ARPA) funding

Announced by Illinois Department of Commerce & Economic Opportunity

- Local governments with fewer than 50,000 residents that have not yet received any ARPA aid are eligible to apply for the available funds—in Illinois, there are just over 1,250 eligible units of local government.
- To apply for funding, authorized community representatives may access a portal administered by the Department of Commerce and Economic Opportunity and must submit certain required documentation.
- Payments are expected to be distributed in two installments; the first in the coming months and the second approximately one year from the first payment.
- Local government officials who are unsure whether their communities qualify for these funds can check their eligibility
- **The deadline to apply for funding is September 30, 2021**
- <https://www2.illinois.gov/dceo/CURENEU/Pages/default.aspx>



American Rescue Plan Funds (ARPA) for Non-entitlement Units (NEU) of Local Government (Portal now open)

The American Rescue Plan Act of 2021 (ARPA) appropriates \$19.53 billion to States for distribution to tens of thousands of non-entitlement units of local government (NEUs). ARPA directs the U.S. Department of the Treasury (Treasury) to make payments to each State for distribution to NEUs within the State. Illinois' NEU allocation is \$742 million. In Illinois, eligible NEUs include more than 1,250 cities, towns and villages that each serve a population under 50,000.

These funds provide a critical source of relief for local governments, including smaller governments which have not received direct financial assistance from the federal government since the onset of the COVID-19 pandemic.

To assist local governments as they claim their allotments, the State of Illinois has established [The NEU Portal](#).

ILLINET Traffic survey & delivery counts

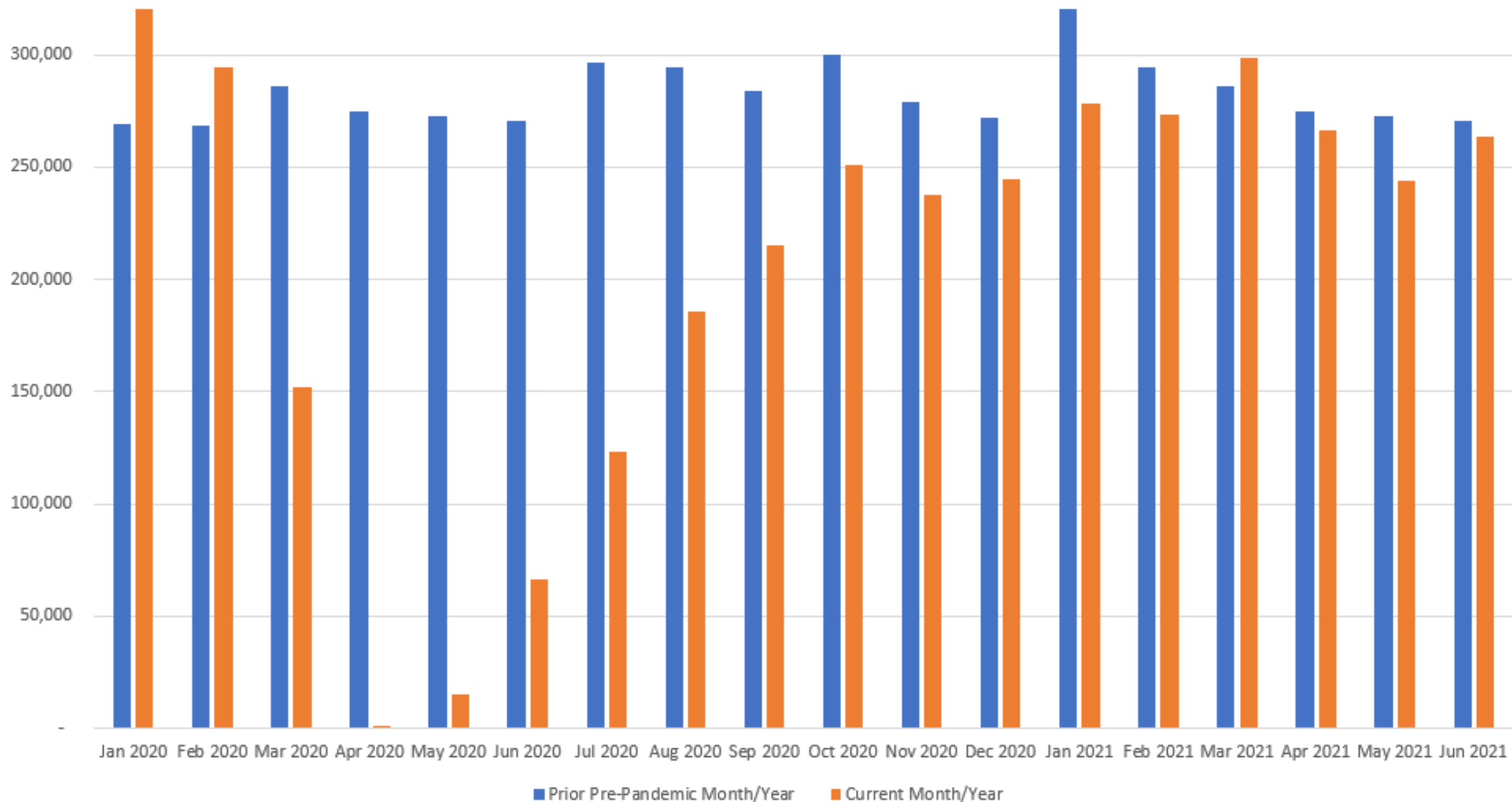
RAILS Delivery Count

- August 9 -12, 2021
- Physically hand count items going OUT
- Complete the [online Count Form](#) for each day

ILLINET Traffic Survey FY21

- ILL & RBP data
- July 1, 2020-June 30, 2021
- [BLUEcloud Analytics report & documentation updated](#)
- ISL has not yet released FY21 instructions
- Deadline is March 31, 2022

Transits back to pre-pandemic levels



Statistics

- Please refer to the Monthly Operations Report within the [monthly Board packet](#) for statistics and trends.

Other Upcoming Meetings

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



Diversity Audits: Sharing and Panel Discussion

GoToMeeting

Event Type(s) Meeting Discussion

Sponsor SWAN - System Wide Automation Network



SWAN Cataloging Office Hours

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN Circulation/ILL Office Hours

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN Directors' Coffee Hour

GoToMeeting

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 Board Meeting

GoToWebinar

Event Type(s) Meeting

Sponsor SWAN - System Wide Automation Network



SWAN Academic & Special Library Consultation

GoToMeeting

Event Type(s) Training

Sponsor SWAN - System Wide Automation Network



SWAN Members Fireside Chat

GoToWebinar

Event Type(s) Meeting

Sponsor SWAN - System Wide Automation Network

Thank you!

**Next Fireside Chat: August 31st
– 11:00-12:00**

Register at GoToWebinar -
<https://attendee.gotowebinar.com/register/3820917666351384333>

