



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

Meeting Packet

December 2, 2021

10:00 A.M.



SWAN Administrators' & Directors' Quarterly Meeting

December 2, 2021

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. Introduction Item – Live voting platform demonstration
5. Action Item – Approval of the September 1, 2021 Quarterly meeting minutes (pgs. 3-4)
6. Information Item – Annual presentation on SWAN strategic plan (pgs. 5-22)
7. Information Item—Library engagement platforms overview (pgs. 23-49)
8. Information Item—EBSCO subscription group-purchase usage (pgs. 50-53)
9. Information Item – Future planning and interest in digitization projects/grants
10. Announcements and Questions
11. Next meeting: March 3, 2022

Meeting Information

Member Comment after each agenda item. The Quarterly Meeting will be live streamed via GoToMeeting. The URL below is specific to the date of the meeting. Please join the meeting from your computer, tablet, or smartphone.

Join the meeting from your computer, tablet or smartphone:

<https://www.gotomeet.me/SWANBoard/swan-quarterly-meeting>

You can also dial in using your phone: (571) 317-3122

Access Code: 593-454-013

SWAN Administrators' Quarterly Meeting Minutes

September 2, 2021

10:00 a.m. – 12 p.m.

Meeting recording available

<https://youtu.be/fUBhkvJq1NI>

1. Call to Order and Welcome

President Bodewes called the meeting to order at 10:02 a.m. Blazek, Bussey, Cottrill, Jarzemsky, Jenkins, present to establish a quorum

2. Public Comment

No public comment

3. Introduction of New Library Directors and Visitors

Lisa Knasiak – Director - Chicago Heights Public Library

Nikeda Webb – Youth Services Manager - Matteson Public Library

Sara Schroeder –Marketing & Public Relations Manager - Tinley Park Public Library

Jen Ryjewski – Assistant Director - Downers Grove Public Library

Amanda Kowalcze - Director - Frankfort Public Library

Leighton Shell – Director - Stickney-Forest View Public Library Director

Frank Murray – Director - Evergreen Park Public Library

4. Introduction Item

Live voting platform demonstration

Demonstration of the voting platform was explained and tested.

5. Action Item – Approval of the June 3, 2021, Quarterly meeting minutes

Blazek (Palos Heights) moved to approve the June 2021 Quarterly meeting minutes, seconded by Ben Weseloh (West Chicago). No objections, minutes approved by DirectVoteLive voting platform.

6. Discussion Item – information security risk assessment

An explanation of SWANs goals for a security assessment was given by Steven Schlewitt. He gave an overview of all phases involved in the assessment. A breakdown of the timeline was given as well.

SWAN would like to hire Sikich LLP as the vendor. Skog gave an overview of the costs. The amount for this will come from the SWAN reserves.

Blazek approved, Verzani seconded. Approved by DirectVoteLive voting platform. Results: 45 yes, 1 no, 0 abstain, motion passed.

7. Discussion Item – Aspen Discovery

Tara Wood gave an update on Aspen Discovery which included Cohort Schedules, Development progress, the Development Cycle, and Development Priorities.

8. Information Item – Diversity, Equity & Inclusion in Metadata

Scott Brandwein discussed the task force assigned to evaluate Diversity, Equity & Inclusion in our metadata. More in depth discussions will be coming up in the future to discuss subject headings, particular terms.

9. Information Item – Summary of regional library director meetings & pandemic needs

Skog gave an update on the regional meetings which discussed ARPA funding. Skog will be providing an update on Grants that SWAN has applied for. Tortorella gave an overview on Statistics within SWAN.

10. Announcements and Questions

Leighton Shell (Stickney-Forest View) announced that one of the areas in their district that belongs to Stickney Township is in the process of renovating an old clinic building and asked Leyton to partner up with them to carve out some space for them to be like a pseudo library.

Next Meeting: December 2, 2021

Adjournment: 11:11 am

Minutes Prepared by Ginny Blake

Respectfully Submitted,

SWAN Tactical Plan

IN SUPPORT OF STRATEGIC PLAN FOR FISCAL YEARS 2021 &
2022

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

Completed Goals: 2019 - 2021

<p>Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)</p> <ul style="list-style-type: none"> • Form operational think tank, aka Clarity Task Force • Curriculum of training for library staff • Study ILS processing inefficiencies • Expand online documentation • Assess discovery platform & provide recommendation • Implement new discovery platform (Aspen) • Form item type task force • Initiative for online self-paced training • Institute monthly office hours for key applications and services 	<p>Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions</p> <ul style="list-style-type: none"> • Complete infrastructure migration • BLUEcloud Mobile app • OCLC Holdings Manager • Offer e-content group purchases • Evaluated BLUEcloud staff interface • Perform assessment of BLUEcloud Acquisitions • Automate delivery in-transit label • Negotiate extension of SirsiDynix agreement • Negotiate 3-year agreements with EBSCO • Migrate servers & services from RAILS to SWAN infrastructure • Replace automated voice notification • Add 3 new libraries: SWAN100 project • Develop AV item type recommendations • Establish parameters for Fine Free • Pilot Baker & Taylor rentals • Build “Your Library Statistics” monthly report • Implement Book Club Reservation system • Implement Pseudo Libraries for drive-up and locker pick up • Automate monthly removal of inactive patron records
<p>Objective 3: Reconstitute as a Mission Driven 501c3 with Clear Representative Governance Practices</p> <ul style="list-style-type: none"> • Evaluate organization legal entity • Revise budget structure 	<p>Objective 4: Increase Presence of the Patron Perspective</p> <ul style="list-style-type: none"> • Develop & deploy online patron registration • Incorporate patron help into public catalog • Increase protection to patron personal identifiable information (PII) • Develop accessibility standards
<p>Objective 5: Strengthen the Collective Identity</p> <ul style="list-style-type: none"> • Pilot online membership forums • SWAN eXpo 2019 • Clarify role of advisory & user groups • Hold SWAN eXpo 2020 web series • Convene monthly Fireside Chat sessions 	<p>Objective 6: Seek External Funding Options to Support the Research & Development Initiatives of SWAN</p> <ul style="list-style-type: none"> • Underway

Tactical Plan: proposed initiatives for 2022

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.

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.

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: Extended to June, 2022 (recommendation to be presented to membership)

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. Based on consolidation of item types, review of priority placement of local copy in Aspen, and analysis of high demand holds supplement through rentals, a proposal for more uniform practice in transiting new materials will be presented to the membership. Pilot libraries wishing to implement recommendation will be tracked through circulation efficiency (time with patron vs time in transit) of new items to measure effectiveness.

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]

Dave Pacin, Systems Administrator, 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. 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.

Starting in November, 2021, Circulation Advisory members are actively testing circulation functionality and a completing gap analysis to be shared with SirsiDynix developers. January-February, 2022, templates for pre-cats will be developed and deployed to cataloging pilots libraries. With major enhancements and bug fixes implemented in Fall 2021, new acquisitions libraries may be considered for production use of BLUEcloud Acquisitions.

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: Ongoing

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: On Hold

HR Source has been contracted to work with SWAN on the survey. The survey was planned development and to be issued in October 2020. However, with continued exceptions to normal activities during the pandemic, this survey is on hold until a closer return to status quo.

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. SWAN has developed a guide to authentication methods to assist vendors and partners in determining the best approach for connecting to SWAN's systems.

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 2019 storm which impacted SWAN headquarters enabling additional service support migrating to the cloud infrastructure established in 2018.

Work in 2021 included review of backup processed and archival storage for recovery. Platform security was a major component in the work contracted in Fall 2021 with Sikich for their Information Security Risk Assessment Services.

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.

Update: Ongoing

During 2020, additional documentation and shared practice was developed for supporting teacher cards, out-of-district students, and students within the SWAN membership. Working with our SWAN library member, Bensenville School District #2, SWAN has entered into an IL-NDPA (Illinois - National Data Privacy Agreement) with Bensenville School District #2. This agreement is a master agreement with BSD#2 which other school districts may "piggy-back" on this original agreement.

Update: On Hold

While work with supporting schools, teachers, and students is ongoing, formation of the Task Force to further expand services and outreach to these populations is on hold. This is due to member library staff limitations and school constraints during these times. When our member libraries and school partners have capacity to work more closely on partnerships, this work will commence.

Initiatives 2023

Objective 2

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

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

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 include self-paced instructions on cataloging, serials, series, circulation basics, and patron management. Ongoing webinars are recorded for just-in-time learning. The SWAN Support Site was revamped to provide a more focused and sequenced list of training. <https://support.swanlibraries.net/meetings-trainings/training/search>

Conduct ILS Processing Inefficiencies Evaluation

The Symphony ILS configuration was reviewed for holds management, lending, and record loading within the Acquisitions workflow. SWAN's configuration and procedures are continuously reviewed, and documented both on the SWAN Support Site for members and internal knowledge base documentation for SWAN staff .

Create More Online Documentation

The SWAN support website relaunched in December 2018 and staff continued focus on writing documentation for library staff. Annually a content audit is managed by the UX team and content review assigned throughout SWAN staff. The latest audit was completed in summer 2021.

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>

Recommend Replacement of Discovery Interface

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. The first

phase of the SWAN Aspen Discovery project concluded August 2020.

Implement Parallel Discovery Platform (Aspen)

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.

The catalog was deployed to the first group of libraries in October 2021, with the second group set for January 2022. The subscription to SirsiDynix Enterprise will no longer be included in the upcoming budget, effectively ending the use of Enterprise for SWAN libraries May 1, 2022.

Form Item Type Task Force (Clarity Recommendation)

Clarity identified the need to consolidate Symphony Item Types. The approach of using a task force was modified due to the global pandemic that arrived in March 2020.

The decided approach during the pandemic is to utilize Cataloging, Circulation, and DUX advisory groups to discuss SWAN's recommended Item Type configuration. This topic is a focal topic for FY20, 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.

Led by Samantha Dietel, Bibliographic Services Consultant, book, audio-visual, and LoT (Library of Things) item types have been consolidated. Libraries continue to schedule one-on-one consultations and collection analysis with Sam to modify their collections and policies.

Training initiative for online self-paced training

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 created 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 continue to assist in identifying these situational training lessons.

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 were created.

As of November, 2021, seven online courses have been developed and deployed. In Fall, 2021, Inquisiq, an LMS (Learning Management System) was added to our toolset. This LMS allows tracking of learners and certification. Self-registration will open up in early 2022 for library staff.

Institute Monthly Office Hours for Key Applications and Services

Starting in January 2021, SWAN offered monthly office hours in cataloging, circulation, interlibrary loan, and BLUEcloud Analytics. Additionally, special sessions were offered for academic and special libraries. Aaron also hosted bi-monthly Directors' Office Hours. All of these casual, member-driven problem-solving sessions were open for shared discussion and specific case study. They proved to be valuable to members and SWAN staff and often identified areas where additional clarification, instructions, and procedures were required. These will continue and be expanded in 2022 to include Aspen Theme-based sessions, Circulation & Hold Map, and BLUEcloud staff.

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.

The mobile app feature set was expanded in 2021 to support self-checkout. Ten SWAN libraries have implemented this service.

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).

Since June 2020, SWAN has provided monthly OCLC holdings updates for our consortia partners (CCS, Pinnacle, PrairieCat, RSA, SHARE/Heartland, and SWAN).

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.

Additional opportunity for group discounts included Kanopy with SWAN libraries procuring a 10% discount in FY 2022 based on participation levels.

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.

In 2022, a production-readiness phase begins for libraries well suited for use of BLUEcloud staff.

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.

In December 2020, three new libraries joining SWAN, Glenside Public Library District, Roselle Public Library District, and Warrenville Public Library District implemented BLUEcloud Acquisitions in production.

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.

The BLUEcloud Central update of Fall 2021 has embedded this functionality into BLUEcloud Circulation. We shared our development of the Transit Delivery Label code with SirsiDynix in hopes of making this a part of the BLUEcloud functionality. It is exciting to see this work implemented into BLUEcloud.

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.

Migrate RAILS Hosted Servers to SWAN Infrastructure

SWAN transitioned 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.

Migration of all RAILS hosted services including OTRS ticketing system, Drupal support site, and mailman subscription lists were migrated in early 2021. RAILS support of these services was discontinued in June 2021. All of these services are now hosted in our cloud infrastructure.

Replace SWAN Automated Voice Notification

SirsiDynix Voice Automation reached end of life and was replaced in June 2021. SWAN selected the 3rd party solution from Unique Management, using a service called MessageBee. This system could stand in front of any ILS SWAN chooses in the future.

Add Three Libraries to SWAN – SWAN100 Project

The public libraries Glenside, Roselle, and Warrenville were added as full SWAN members in December 2020. The project was funded by RAILS Catalog Grants to cover one-time costs. Mapping of item types which drive circulation and holdability followed 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 are the first in SWAN to use BLUEcloud Acquisitions in production.

Develop Audio-Visual Item Type Recommendations for SWAN100

We established a standard set of audio-visual item types for new libraries joining SWAN. 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

SWAN developed a uniform set of guidelines to provide a consistent staff and user experience in implementing fine free policies across the SWAN consortium. SWAN staff are consulting with libraries to review circulation rules, holdability, item types, user profiles, and bill forgiveness during the process of implementation for a library. The guidelines are all posted on the SWAN Support site. In addition to guidelines established in early March 2020, Fine Free For Now options were introduced during COVID-19 closures allowing libraries to quickly transition to temporary use for patron service.

As of September 2021, Fine Free For Now options were no longer available. Libraries returned to pre-COVID circulation rules or adopted permanent fine free rules. As of November 2021, 59 of 95 SWAN public libraries are fine free.

Pilot BLUEcloud Acquisitions and Baker & Taylor Rental

SWAN implemented BLUEcloud Acquisitions into SWAN's production BLUEcloud environment and conducted 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. SWAN now has a contact with Baker & Taylor for rental copies. The first order of rental items were 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.

As part of the rental subscription, a set number of items can be retained permanently. In collaboration with our book club kit pilot, popular titles once removed from SWAN item circulation are re-deployed to support book club kits. Currently Geneva Public Library is working with SWAN to supplement book club kits with targeted copies, giving these resources renewed use and extended sharing across the membership.

Build "Your Library Statistics" Monthly Report

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.

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.

Implement Book Club Reservation System

In 2021, Helen Pinder, Resource Sharing Consultant teamed with Lauren Maxwell, Geneva Public Library and Lizzie Matkowski, Downers Grove Public Library to implement KitKeeper as a shared reservation system for book club kits. Shared processing flows, cataloging standards, and kits assembly guidelines were developed by the pilots - <https://support.swanlibraries.net/documentation/83064>.

The project is now open to any library wishing to participate in sharing book club kits. Training sessions and demonstration have been conducted. Oak Lawn Public Library and Westmont Public Library are currently onboarding.

Implement Pseudo Libraries for Drive-Up and Locker Pick Up

In June 2021, seven libraries (Downers Grove, Indian Prairie, Geneva, Glen Ellyn, Oak Park, St. Charles, Villa Park) launched pseudo library locations to support drive-up windows and lockers. Special processing instructions, analytics, and enhancements to the online catalog for patrons to select these locations were developed. The work and success of this project was shared by the group at SLUI (SirisyDynix Library Users of Illinois) in the fall.

Automate Monthly Removal of Inactive Patron Records

As of September 2021, an automated monthly removal of inactive patron records is processed. This transition to an automated process allows libraries to review and update patron records before they are eligible for removal the next month, if desired. This automated process eliminates the previous annual process, providing a more consistent work pattern for library staff and leveling of patron counts for reporting purposes.

Protecting personal identifiable information is critical to SWAN. Removal of inactive records helps protect our patrons' privacy and minimizes potential for security breach.

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.

Develop Accessibility Standards

SWAN is committed to providing accessible software and services to our member libraries to serve people with a wide range of hearing, movement, sight, and cognitive ability. In September 2021, our Accessibility Statement was published which includes evaluation of products for accessibility, education and training, and working with partners to address any accessibility issues.

<https://support.swanlibraries.net/node/87821>

Objective 5: Strengthen the Collective Identity

Pilot Online Membership Forums

The SWAN Community Forums was rolled out in 2019 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>

Hold SWAN eXpo Web Series to Substitute 2020 Event

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

Convene Monthly Fireside Chat Sessions

Starting in March, 2020, SWAN has offered weekly, bi-weekly, and now monthly membership gatherings. These initially served as a vehicle to communicate urgent news during the pandemic and have grown into monthly recaps of projects and happenings within our SWAN community. Input from members indicate that these sessions are of value and help keep us connected and working towards shared goals.

<https://support.swanlibraries.net/covid-19/fireside-chats>

System Wide Automated Network Whitepaper

Library Engagement Platforms

Automated Marketing for Libraries

Aaron Skog, SWAN Executive Director
11-29-2021

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LIBRARY ENGAGEMENT PLATFORMS OVERVIEW

Introduction

SWAN libraries are looking for tools to engage patrons through an onboarding process or through targeted messaging about library e-resources and library events. Libraries would like to track patron participation, and provide direct marketing based on patron's selected preferences. This falls under the marketing automation that is now widely utilized by businesses and organizations outside of the library sphere.

This whitepaper is an overview of four platforms in use for library marketing and engagement.¹

Patron Point
OrangeBoy Savannah
SirsiDynix Community Engagement Platform
OCLC Wise

This SWAN whitepaper is intended to educate member libraries on how these automated marketing platforms work to promote deeper engagement between libraries and their patrons/users. SWAN provides a recommendation at the end of this whitepaper on what SWAN libraries should prioritize within engagement platforms. Oak Park Public Library, Tinley Park Public Library, Lansing Public Library, and Downers Grove Public Library are using one of the engagement platforms outlined below. RAILS now has Patron Point listed under its deals and discounts, further stoking interest in Patron Point among member libraries.

¹ Innovative Interfaces Inc is developing an engagement platform Vega Engage, with Illinois library consortia PrairieCat as partner in the process. <https://librarytechnology.org/pr/25457>

Patron Point

Leadership

Patron Point is based in the UK, founded by CEO Ian Downie who also founded the company collectionHQ later sold to Baker & Taylor. Patron Point was founded to provide automated marketing to public libraries. Ted Fons, Vice President of Technology, worked at OCLC and now oversees the implementation of the Patron Point systems for customers, and is responsible for the data and security of Patron Point. Gene Shimshock, Vice President of Community at Patron Point, was formerly with Innovative Interfaces and is Patron Point's marketing chief.

Product overview

The purpose of Patron Point is to bring the commercial marketing solutions widely used by companies and offer it to public libraries. The Patron Point marketing strategy approach is more on the "marketing doing" side, so this requires staff on the library side to understand how to use the tools Patron Point provides.

The product was built by Patron Point and focused on all the places where users connect with the library. Patron Point works with many of the ILS solutions, including Symphony.

Key features of Patron Point include:

1. Welcome emails
2. Automated card renewal
3. GIS mapping to determine the precise location of a home library
4. Address verification using 3rd party APIs
5. Newsletters
6. Branding on each notification based on library is an option
7. SMS option for sending reminders
8. Marketing automation

Automation & Segmentation

The two key components of the Patron Point marketing are automation and segmentation of library patrons, which within an engagement platform is to "deliver the right message to the right person at the right time."

Patron Point can collect the library's ILS user data, its eBook platform users and activity, library online database activity, event/booking, library website visits—all as potential sources of data that can feed into Patron Point.

When a patron has been a library member for 6 months, Patron Point can send them an email to determine satisfaction with the library. This is an example of library engagement through a "segment" of the Patron Point system.

Patron Point can provide webforms to the library that can be embedded on the library website to engage known users or new visitors. Patron Point has recently updated its product interface for library newsletters.

Patron Point will outline a “customer journey” which for libraries is more like promoting the benefits of a membership organization rather than completing a sale. The goal is to attract new cardholders through social media, search engine optimization, and local promotion. Patron Point can provide libraries code for pop-ups and forms to be used on the library website to encourage newsletter sign-ups, event registration, and promote e-cards to new site visitors.

Some of the key components of Patron Point “customer journey” include:

1. Joining the library: customized, branded online patron registration form. This is created in Patron Point and then the embedded code can be placed on the library website. Patron Point can accommodate different workflows and policies within the form. The user record is created in the ILS and this then triggers a welcome email to the patron from Patron Point. This will likely be a sequence of emails that will help a new cardholder learn about the library’s offerings.
 - a. Skokie example, has 5 emails that go out over time
<https://skokielibrary.info/about/library-cards/apply/>
 - b. Tracking codes are embedded in the library website
 - c. The tracking is in the call to action based on the welcome email
2. Engaging the customer: this can award activity that takes place and utilized a point system within Patron Point’s Patron module to see how effective the marketing is.
 - a. A segment can be created for nonactivity and when that date is reached, the patron would be targeted with some promotion to re-engage with the library.
 - b. Promote digital resources, promote staff reading recommendations based on patron segments within Patron Point.
 - c. Event promotions based on patron segments.
 - d. Create library newsletters-- template based, branded, but the library segment would be targeted with different content.
3. Membership renewal: this involves a sequence of reminders to renew their library card about to expire.

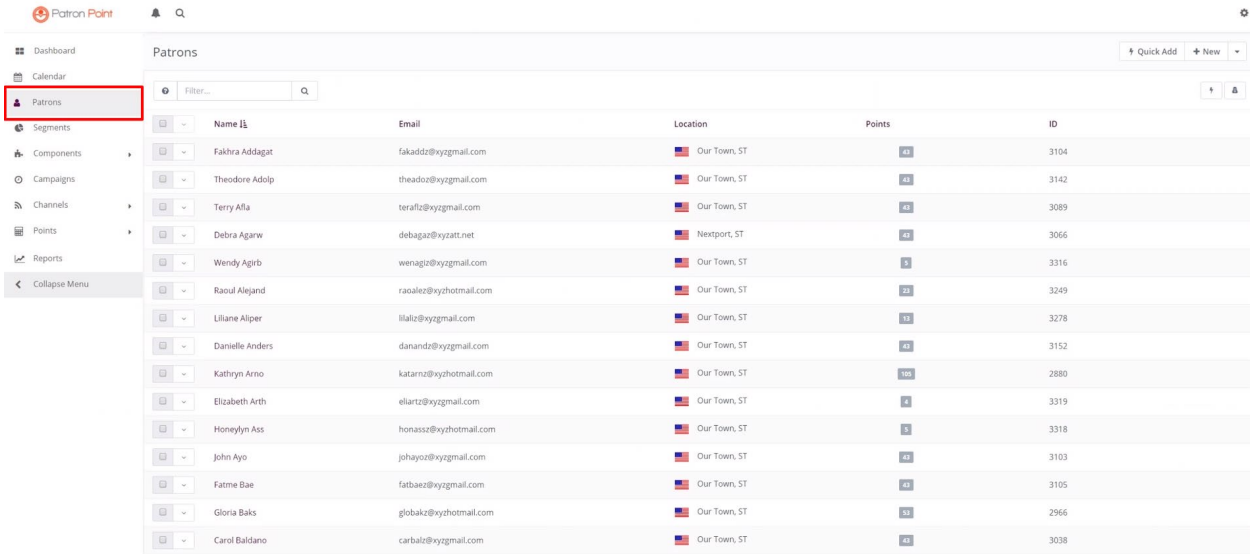


FIGURE 1: PATRON POINT MODULE FOR COLLECTED PATRONS AND THEIR ASSOCIATED USAGE BASED ON LIBRARY BARCODE

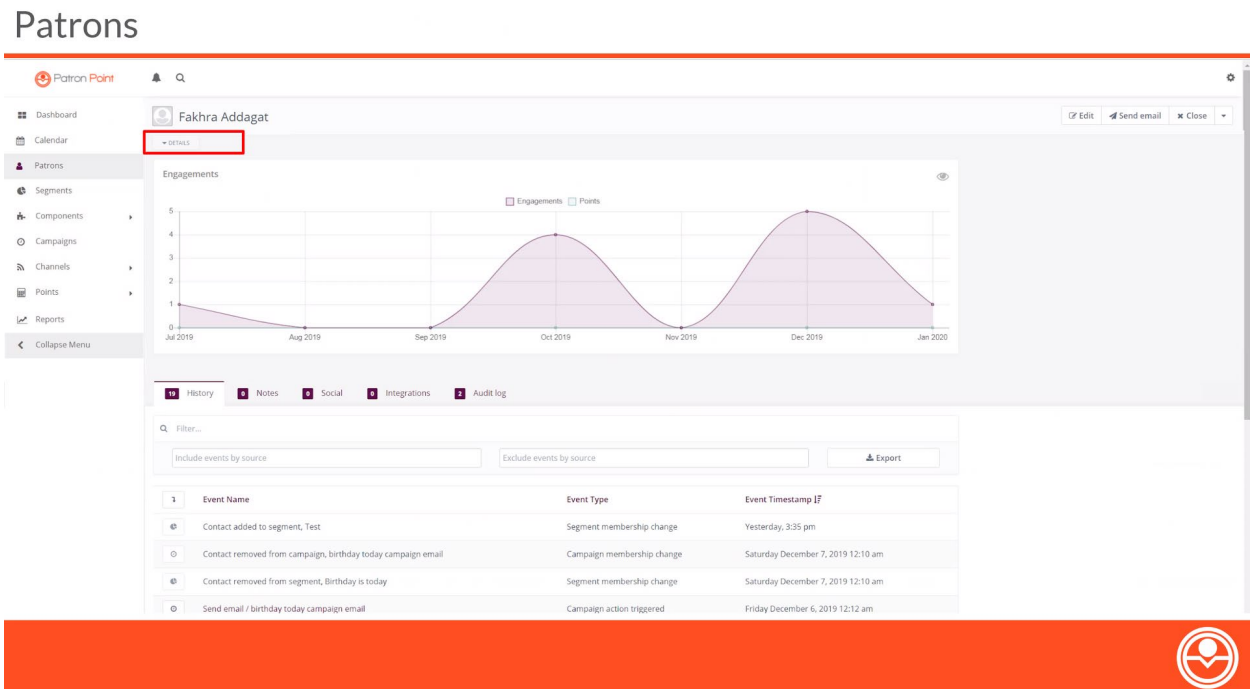


FIGURE 2: PATRON POINT DETAILS ON A SPECIFIC LIBRARY PATRON

Patrons - core

The screenshot shows the Patron Point interface for a patron named Fakhra Addagat. The 'Core' tab is selected and highlighted with a red box. The interface includes a sidebar menu on the left with options like Dashboard, Calendar, Patrons, Segments, Components, Campaigns, Channels, Points, Reports, and Collapse Menu. The main content area displays the following data:

Title	
First Name	Fakhra
Last Name	Addagat
Email	fakaddz@kyzgmail.com
Phone	
Mobile	
Address Line 1	1337 Laurel Street
City	Our Town
State	ST
Zipcode	99930
Country	United States
Points	43
Date of Birth	1986-12-06
Create Date	2016-10-02
Barcode	2111800000000
Expiration Date	2019-07-14

FIGURE 3: PATRON POINT DETAILS ON A SPECIFIC PATRON (NOTE THE COLLECTED DATA INCLUDING DOB, BARCODE)

Patrons – preferences

The screenshot shows the Patron Point interface for a patron named Fakhra Addagat. The 'Personal' tab is selected and highlighted with a red box. The interface includes a sidebar menu on the left with options like Dashboard, Calendar, Patrons, Segments, Components, Campaigns, Channels, Points, Reports, and Collapse Menu. The main content area displays the following data:

Core	
Unsubscribed	No
Preferred Subject(s)	Fiction
Preferred Format(s)	No Preference
Preferred Program(s)	Adult
Has Preferences	Yes
Home Library	Main Library
Selective Unsubscribe	Library Activities
Email Validation	Valid

FIGURE 4: PATRON POINT PATRON PREFERENCES INCLUDING LIBRARY PROGRAMS AND SUBJECTS.

Fakhra Addagat	
Core Personal Professional	
Promoter Score	10
Patron Type	1
Last Activity Date	2018-08-19
Current Checkouts	1
YTD Checkouts	31
Lifetime Checkouts	84
Overdrive Total Checkouts	8
Overdrive Last Checkout Date	2017-02-02
Days Since Last Activity	17

FIGURE 5: PATRON POINT PATRON DETAILS UNDER PROFESSIONAL SHOWING THE PROMOTER SCORE BASED ON LIBRARY ENGAGEMENT, INCLUDING CHECKOUT METRICS AND ACTIVITY DATES, INCLUDING OVERDRIVE.

New Segment

Details Filters

Choose one...

Days Since Last Activity greater than 90

and

Overdrive Total Checkouts less than or equal 5

Public Segment Yes

Available in Preference Center Yes

Published Yes

Cancel Save & Close Apply

FIGURE 6: PATRON POINT SEGMENTS - THE ABILITY TO GROUP USERS, E.G., CREATE SEGMENTS, ALLOWS TARGETED MARKETING WITHIN PATRON POINT.

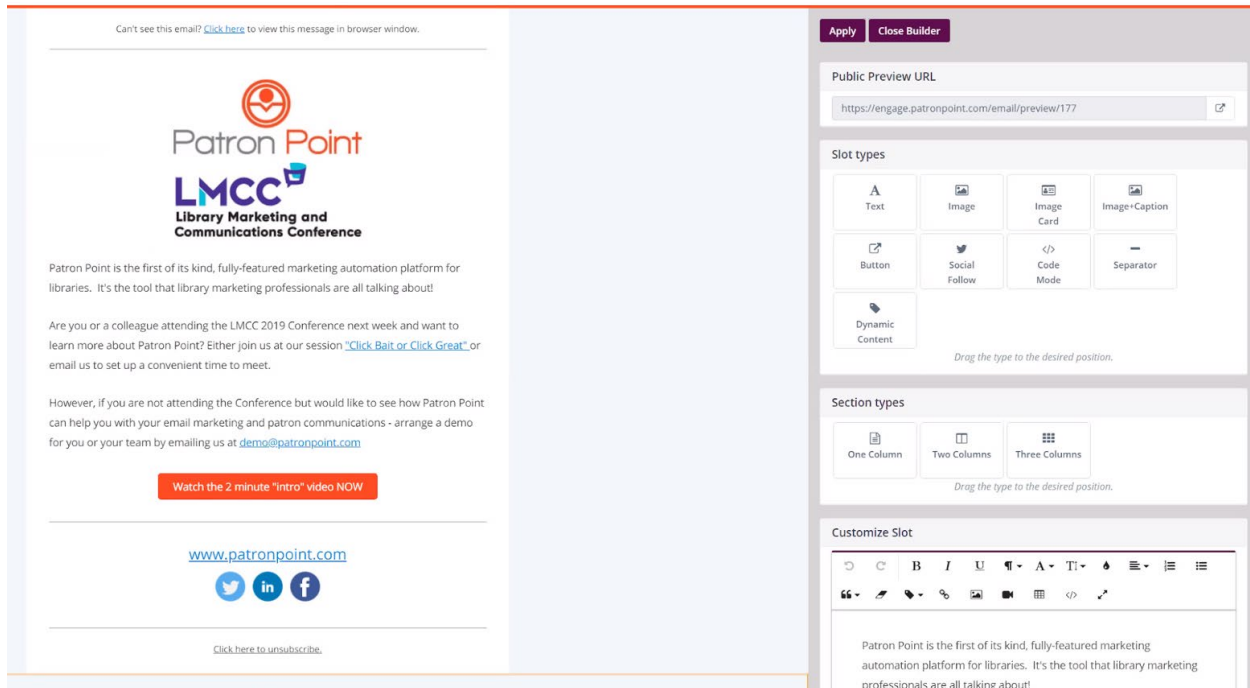


FIGURE 7: PATRON POINT EMAIL MARKETING INTERFACE

Newsletters can include an RSS feed from a library calendar. The recommended reading list to patrons can be fed from the reading history of that patron.

Reader Recommendations

Patron Point added a new service in January 2021 for use within email campaigns or website visitors.

<https://www.patronpoint.com/recommends>

The reader recommendation service relies on the ProQuest Library Thing's rating of items based on a list of subject areas that a patron can select from on the library's website. The Patron Point emails sent to the patron will then have subjects selected by the patron. The ProQuest Syndetics Unbound pricing for the library would be licensed through Patron Point.

It is possible within a library consortia arrangement to have some libraries using more of the Patron Point features with other libraries only having basic Patron Point features such as library card sign-up.

Patron Point data & API

Patron Point utilizes SirsiDynix Web Services for querying the ILS and writing back changes to the ILS. Patron Point will check for duplicate users within its e-card sign up process and provide address verification prior to writing back to the Symphony ILS. It can also create a temporary e-card and then require the user to verify in person for a full library card if it is unable to complete the transaction for some reason.

Patron Point could use its “Patron Synch” feature to check to see if new users signed up in Symphony and pulls that data into Patron Point.

Patron Point Questions & Answers

1. Is there is an initial harvest of patron data from the ILS into Patron Point or if it works solely with patrons that registered online via those tools?

Yes, there is an initial harvest of patron data from the ILS. After the initial harvest, Patron Point receives updates using Symphony Web Services for existing patrons and Patron Point’s Verify Register service for new patrons.

2. Can Patron Point push the last activity date field back (based on all data inputs) into the ILS?

Yes, Patron Point can trigger the Symphony Last Activity Date update feature to show a patron’s current engagement.

3. What is the order of operation e.g., would changes happen in the ILS and then update Patron Point, or vice versa?

Patron Point can query ILS data with a scheduled overnight job, updating Patron Point, and then sending patron notifications from there.

Patron Point customers

Tinley Park Public Library Patron Point implementation

Tinley Park Public Library is the first SWAN member library to sign an agreement with Patron Point. Patron Point is providing Tinley Park Public Library the following:

1. Welcome emails - Gives patrons a great first impression, communicates key benefits, services and offerings of the library.

2. eCard Registration program - online library card registration program.
3. Patron Sync – real-time data interface available that queries against the SWAN Symphony ILS and other third-party systems used by the library.
4. Patron Address Verification service - provides address verification for the purposes of confirming patron residency in Library service area.

SWAN specified within a Patron Point sharing agreement the Symphony ILS patron codes that will be sent to Patron Point in a data extraction. The data is sent to a secure Amazon S3 folder. SWAN has a BLUEcloud Analytics report that can pull the data for Patron Point. Patron Point has specifications for the data file (CSV, pipes, etc.).

SWAN's SirsiDynix Web Services is utilized by Patron Point, which is a license SWAN holds within the organization and is not accessible to member libraries, but it does not require any additional fee be paid to SirsiDynix. For any SirsiDynix Web Services connection requested, SWAN has to request that from SirsiDynix Support. The connection requires read-write access so that Patron Point e-card software sign-up can write back to the Symphony ILS user database.

From SWAN's perspective, the Patron Point e-card registration will need to comply with the same specifications that went into SWAN's online patron registration, most importantly compliance with COPPA to prevent any e-card registrations made by persons under the age of 13 and Illinois laws regarding library data privacy. Patron Point and SWAN will work together to ensure the data collection specifications for the Patron Point e-card are compliant.

The Patron Point technology requires DNS entries on behalf of the library for proper email configuration. Patron Point uses DKIM/SPF to ensure emails have a digital signature from the library, not Patron Point. This will also require some firewall or email protection whitelisting. For Tinley Park Public Library this means coordinating with the village IT department.

Patron Point can track users visiting the library website which will over time record these visits in Patron Point for those library users. The idea is that those library users could be marketed with additional library services or rewards. Patron Point provides a script of website code that is inserted on the library's website. Typically, libraries move forward with a website tracking after implementing some of the other Patron Point services.

The Patron Point programs to start with are e-card registration, welcome emails to newly registered library patrons, and library card renewal campaigns (if the library has library cards expiring).

SWAN and Tinley Park discussed an email campaign to engage with the library's patrons via email on some annual basis to reconfirm home address and contact information.

CLEVNET Consortia Patron Point implementation

CLEVNET is a large library resource sharing consortium located in northern Ohio. The consortium in 2019 arranged a formal agreement with Patron Point to provide services to libraries within its group. All member libraries in CLEVNET can access the Patron Point platform. The cost of Patron Point was kept

lower by having a single portal, rather than each library having a domain access to Patron Point. Managed logins were provided to these libraries by CLEVNET staff. So far 14 libraries of the 46 libraries in CLEVNET are using the Patron Point platform.

Libraries have read-only permissions within Patron Point to see what other library email campaigns look like without making changes to them. CLEVNET reported that the user permissions and roles within the platform does need additional work for a library consortium. The biggest issues with Patron Point are the data segmentation, so the risk of sending an email to all CLEVNET patrons exists. While it isn't easy to make this mistake, it is possible for an entrepreneurial library staff member to circumvent controls CLEVNET has put in place and accidentally email all consortia patrons.

CLEVNET has assigned a single staff as the point person to Patron Point for the 46 libraries. This staff person provides training and support to the libraries. The libraries cannot build their own segments in Patron Point and have to rely on CLEVNET staff to build segments on behalf of the library. The smaller libraries in CLEVNET did well with using Patron Point after their training. Currently, the CLEVNET libraries are not using Patron Point for patron notifications.

Patron Point is not dynamically querying the CLEVNET Symphony ILS in the way libraries might expect. CLEVNET only extracted the patrons with an email address and loaded that into Patron Point. If a patron changes their notification preferences in Symphony ILS, those changes do not necessarily write back to Patron Point. CLEVNET observed that some of the integration with Symphony is new and that Patron Point has more experience with the Polaris ILS integration. CLEVNET has a SirsiDynix Web Services connection with its Patron Point implementation which is primarily to query new patrons registered for the Patron Point "welcome campaign," but no libraries are using the welcome campaign yet (as of the date of this interview).

CLEVNET is using a Microsoft Office O365 email relay and is considering having the overdue notices going out via Patron Point. But based on the very limited Symphony ILS querying that exists currently with Patron Point, this might require some design specifications be created by CLEVNET for Patron Point to build additional queries and dynamic write-backs to the ILS.

CLEVNET considered OrangeBoy but found that the Patron Point company more easily grasped the needs of a library resource sharing consortia. SirsiDynix CEP was also considered.

Other Patron Point customers

Other customers include Brooklyn Public library, selected members of the Kōtui library consortium in New Zealand, Nassau Library System, and Suffolk Cooperative Library System.

Cost

The annual price for Tinley Park Public Library includes a discounted configuration service and a flat rate of \$7,800 per year. Patron Point is willing to provide SWAN a pricing model exclusive to the consortium.

Resources to find out more

<https://www.patronpoint.com/events/>

OrangeBoy Savannah

Leadership

SWAN spoke with Jaime Hirschfeld, Sales Manager, and Jordan Combs, Director of Platform Operations about Savannah, and its data integration.

Product overview

Company began in 1994 as a data analytics tool. The company now works exclusively with public libraries with a goal to bring together disparate data sources within the library to a single interface. Some of this data collection is a manual process but many data sources are automated. The data could include computer usage, checkouts, gate count, Wi-Fi usage, etc. The Savannah platform is 100% web-based and is hosted by OrangeBoy.

Savannah is noted for having six components within its platform.

1. Data warehouse
2. Proprietary customer segmentation
3. Performance reports
4. Targeted customer communications
5. Net promoter score (NPS) feedback
6. GIS mapping capabilities

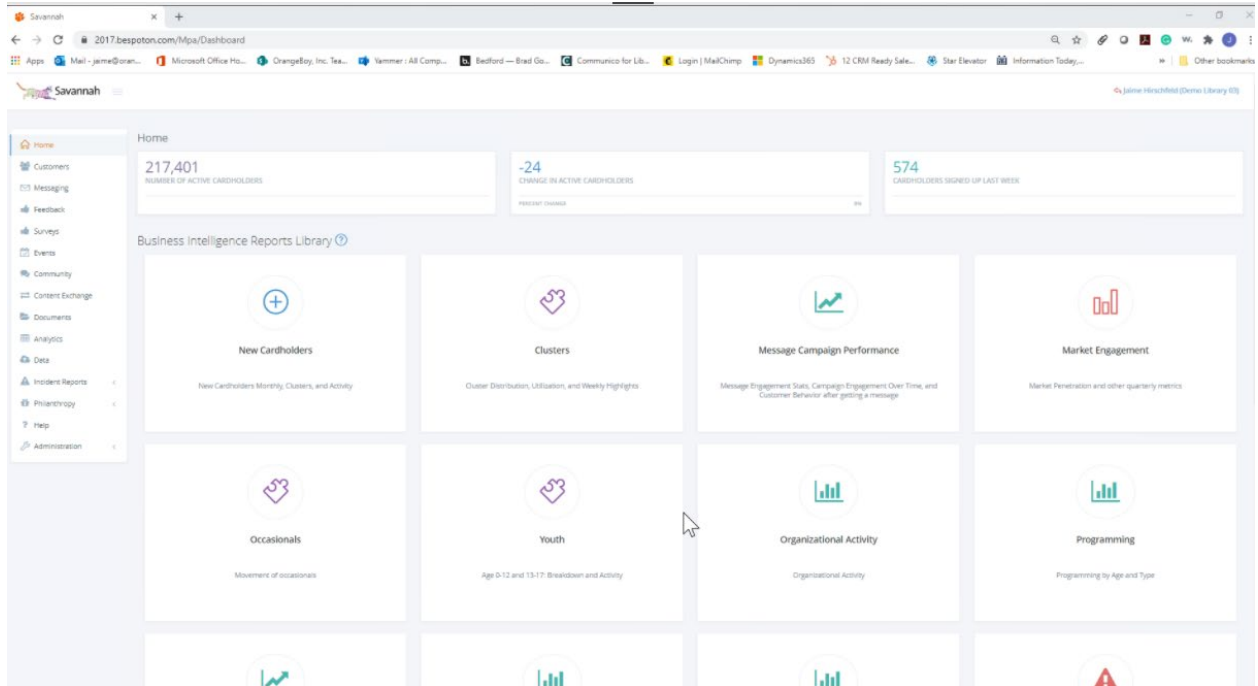


FIGURE 9: SAVANNAH'S OPENING WEB-BASED DASHBOARD

Savannah can perform data collection from the variety of services used by a library, and then uses that information on the library engagement side. Savannah utilizes “clusters,” which is a proprietary solution whereby library users are put into these groups based on their library usage. These clusters can be used to build further patron segments called “slices” to build upon within its messaging platform. The Savannah message component is an email message sent out of Savannah, and these emails appear to be coming from the library.

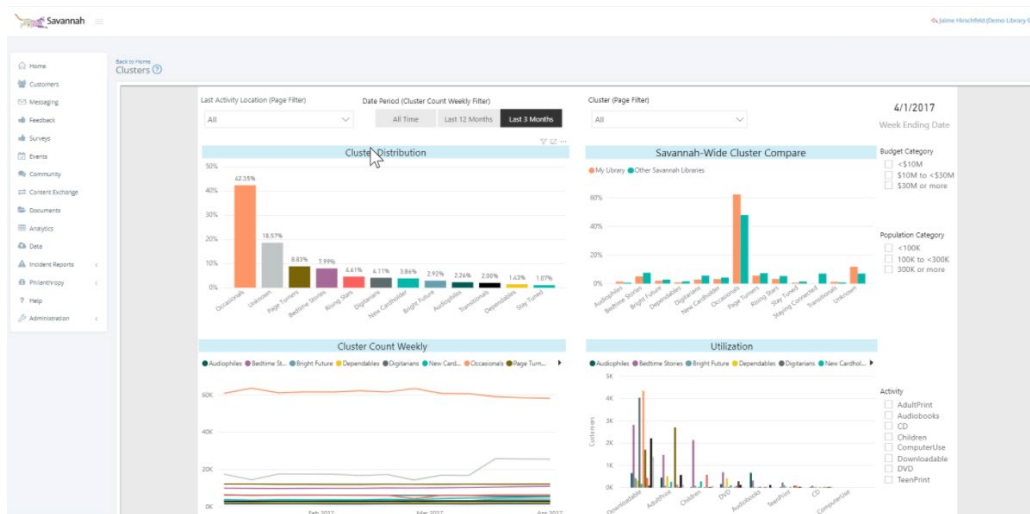


FIGURE 10: SAVANNAH CLUSTERS DASHBOARD

NPS survey: net promoter score

Another tool used within marketing is to seek out customer scoring of your library called a net promoter score. The score is used within various industries and has only recently been used to determine customer satisfaction within the library profession.



FIGURE 11 SAVANNAH EXAMPLE OF HOW NET PROMOTER SCORE IS DETERMINED

The Savannah Subscription Center allows patrons to self-select some of their interests. However, Savannah is primarily behavior driven. A patron may self-select for e-book interest. However, e-content usage is mined by using the credentials provided by the library, and patron usage will determine if they truly are a dedicated e-book user.

Some library event software platforms are integrated in Savannah, but not as widely yet. The Savannah “event tracker” is an app they provide to be used by library staff to sign-in patrons at an event which will feed into the platform those users attending events.

Savannah does provide geolocation tools which will help a library see from which areas of the community is library usage coming from. The Savannah onboarding process will pull in a geo-service area for a library.

OrangeBoy training & support

Savannah is designed to be a self-service tool used by knowledgeable staff. The OrangeBoy model is to work closely with customers by assigning an account manager to get started on the data importation and to determine the desired goals for the library. OrangeBoy will provide several rounds of training based on a theme. If additional training or orientation training is needed, the library staff can request that at no additional cost. OrangeBoy also has a knowledgebase available online.

Savannah data & API

Data automation is possible with Symphony working with SirsiDynix to create reports with FTP used to send the data extracts to Savannah. The ILS data can be gathered through weekly extracts. Savannah updates as the ILS is updated—so patrons moving to another location or are purged within the ILS are updated in Savannah based on these data extract/imports. Depending on the status, the users are archived rather than deleted entirely.

Savannah customers

SWAN libraries using this platform are Oak Park and Downers Grove Public Libraries. Other multi-site library customers include Cincinnati, Multnomah, and many others.

Oak Park Public Library Savannah implementation

Oak Park Public Library provided SWAN staff an overview of their implementation of Savannah.

The Oak Park subscription to Savannah began in 2017 and its expense was to some degree offset by Savannah replacing other subscription products used by the library. Oak Park has an assigned OrangeBoy account manager who helped answer what they wanted to do with the platform and worked to have data imported into the platform. Oak Park staff have some data manually added to Savannah. Overall, the more data put into Savannah about library patron behavior, the better Savannah will tell the library about how those patrons are using the library. SWAN has automated data extracts for OrangeBoy on Oak Park cardholders based on a set of requested data elements. The data imported from SWAN is only those library cardholders matching that library barcode prefix. This means non-Oak Park cardholders using the library are not captured within Savannah and analyzed.

Savannah “clusters” designed by OrangeBoy and are automated categories of users determined by Savannah based on library usage. There is no personally identifiable information stored in the system, but Savannah will place library users into its clusters such as “active cardholders” or “Cardholders signed up over the past week” or those patrons using e-books.

The library is currently using 7 newsletters designed within Savannah, with the largest subscription known as “stakeholders.” Oak Park additionally makes it possible to subscribe to these email campaigns for those patrons that want to be part of that targeted newsletter. The newsletter campaigns also utilize the Savannah clusters that patron activity ends up in. For example, Oak Park designed a welcome campaign for new library cardholders with 6 emails to those new patrons sent over a set period.

Oak Park is using the Savannah user survey—called the net promoter score, or NPS—to monitor library performance over time. This feature can compare against other libraries using Savannah, which might be compared using population or other criteria. These NPS were started in 2017 and the library will change the survey from year to year but retain a core survey question. The 2020 NPS has been a bit different due to the pandemic, but OrangeBoy provided a customer-wide survey specific to the pandemic for libraries to seek out engagement and awareness of the library’s services.

Savannah does have a learning curve but if your library marketing team has experience with other newsletter tools such as MailChimp they might adapt to Savannah a bit more easily. It will take some time within a library’s culture to embrace the idea of measuring “market penetration” i.e. which are the active households in the community. Some library staff resist the “big brother” aspect of an automated marketing platform.

Savannah will generate quarterly reports on its clusters. Oak Park shares these quarterly with library trustees—albeit with some massaging to make the data presentation more attractive.

Cost of Savannah for Oak Park

The library signed an initial three-year contract, with a second renewal just having taken place in 2020. The price is around \$13,500 annually.

Oak Park is also using the EBSCO Library Aware product for reader's advisory and the widgets for rotating collections on a webpage. The two products Savannah and Library Aware complement each other. The Library Aware code widget is posted on the library website and is typically referred to within the e-newsletter.

Oak Park was using Counting Opinions and ended that product subscription with the use of Savannah. The Counting Opinions was more expensive than Savannah. MailChimp was also used prior and discontinued.

Library consortia

It is possible to include a library-to-library agreement to have more than one consortium member library data harvested by Savannah and provide some analytics on comparative usage.

Cost

The cost is a flat rate per year with no caps on training or consultation. There are additional modules that can be purchased/subscribed.

Resources to find out more

<https://www.orangeboyinc.com/benefits-and-features>

SirsiDynix CEP: Community Engagement Platform

Leadership

Eric Keith, Chief Marketing Officer at SirsiDynix has engaged its customers, SWAN, and library consortia about plans for the Community Engagement Platform. Adam Viator, SirsiDynix provided a demonstration of CEP in July 2020.

Product overview

From SirsiDynix marketing:

Community Engagement Platform helps bridge the gap between libraries and their communities with an easy-to-use marketing automation tool. Library staff can find insights into patron demographics, providing smaller libraries a simple yet comprehensive marketing tool while also providing powerful and specialized tools larger libraries need.

CEP is a comprehensive marketing tool for libraries of all shapes and sizes. It helps teams consolidate multiple marketing tools into one cohesive solution, deliver unified and consistent branding, and create more effective community communications.

Designed specifically for libraries whose public relations efforts are distributed across multiple people with varying degrees of expertise, CEP helps libraries tackle common marketing obstacles. It maintains professionally designed brand consistency through the use of persistent color, font, and graphic styles in landing page and email templates. Libraries currently using products or services that do not communicate with each other, or with the ILS, can replace several services with CEP, saving precious budget resources and creating new efficiencies increasing library team efficacy

SWAN requested a demonstration of Community Engagement Platform (CEP) and followed up with some questions with answers provided below.

CEP is built on the WordPress content management system using customized plugins and is hosted by SirsiDynix. CEP is designed for coordinating a library marketing campaign, where the ease of generating content is simply filling out a form within CEP's web-interface.

Initially, CEP was promoted as a platform tied to Marketo—a major marketing automation platform that is typically out of the reach for library budgets. CEP has now moved away from Marketo as it has reached its first software release. Marketo could be negotiated on a one-off for a special customer. Marketo would be getting performance metrics from the tracking if they are coming into the site or different places, including coordinated marketing campaigns.

SirsiDynix touts three main differentiators of CEP versus other solutions:

1. Marketing is unified and consistent with the use of templates provided within CEP
2. Templates are scalable, views change based on screen size (responsive design)
3. Integration with the ILS is easily completed for existing SirsiDynix customers using BLUEcloud Analytics

CEP features, ala the SirsiDynix overview:

Emails - *Easily and quickly create branded emails to update your community, promote events, or send newsletters. Draft and schedule your emails with custom layouts or templates. Staff can create channels for patrons to opt in or out of email marketing but still receive circulation emails.*

Smart Lists - *Instead of having static, disconnected lists on hard drives or in other services, create dynamic lists of patrons based on current data from your ILS. Use patron data and behavior as criteria for list building and targeted messaging.*

Calendar - *Library staff can add events to a calendar for patrons to view upcoming programming. Patrons can use the multi-view calendar, search bar, and facet searching to browse or search for relevant library events.*

Registration and Ticketing - *Create tickets for a specific event and have them sent straight to the patron's email so they can add it to their calendar. Staff can mark registrants as attended in CEP manually or using the mobile app to scan the ticket's QR code at the event.*

Room Bookings - Setup rooms for programming with options for room type, availability, and capacity. Book the rooms as you create your event for posting in the calendar. The clean and simple UI allows staff to quickly identify open times in available rooms and even reserve the room outside the advertised time for setup and clean up.

Reporting - Get insightful metrics on how your emails or events perform and clone campaigns to build on your successes.

CEP Product Details

With CEP being provided by SirsiDynix, this does present some advantage for integrating its features in various other software SirsiDynix owns, such as Enterprise.

CEP is self-contained for event management, and will not display events from other resources, such as an RSS feed from iCal or Communico.

Email notices integrated with Symphony is not possible through CEP, as the CEP integration is with BLUEcloud Analytics, rather than Symphony's ILS database. Therefore, it does not increment the notification counts within Symphony.

CEP data & API

SirsiDynix Community Engagement Platform API queries are made against the BLUEcloud Analytics platform, rather than directly against the Symphony ILS. CEP is not importing and exporting data but is integrated with BLUEcloud Analytics. Due to this arrangement, CEP cannot write back data to the ILS, e.g., create new users, update user activity. However, the CEP demonstrations showed that many of the user fields library staff are familiar with in WorkFlows are available for creating patron segments in CEP for targeted marketing.

CEP Questions & Answers

See below for clarification questions from the CEP demonstration:

1. Will sites be able to host CEP under their own domain names?

This is under consideration but will likely require a bit more info regarding the SWAN library's setup. Right now, CEP is intended to be a SaaS only product, so hosting it locally from a library's own website might prove to be a challenge since the Smart Lists and reporting features require it to be behind the same firewall as BLUEcloud Analytics.

2. Can you give me some idea of how we can segment CEP (particularly Smart Lists) for large consortia like SWAN? For instance, if I am staff scheduling and email will I see just my library's smart lists or the entire consortia's? Will this be addressed with a "regionalization" product roadmap item?

One of the releases right after general availability will have Smart Lists templates which are preconfigured starter kits for smart lists and can be assigned to users in each instance of CEP. So, while

all Smart Lists are being generated from the single Analytics instance, CEP will be able to assign Smart Lists to users, so they aren't overwhelmed with lists.

3. Any plans on using CEP for all patron communication, including routine notifications (bill, overdue, etc.)?

From the CEP Product Manager: Possibly. We have plans to connect CEP to Pinpoint's Journey's which would enable features like these. My goal is to prioritize as the next thing on the roadmap after the existing roadmap items. SirsiDynix is currently estimating the size of this work and will hopefully be available in 2021.

4. Will there be an ability to import events from other calendars?

No current plans to ingest 3rd party calendar data but we will be setting up feeds to publish CEP events to other calendars.

5. Where do I access the answers patrons give to questions I might set up in the event RSVP? For example, if I ask what type of event you want to see in the future or how they heard about the event, where do I access that information? Will it be available to BLUEcloud Analytics?

Custom field responses should be available in the View Attendees for the event. And yes, with BLUEcloud Analytics connecting live to the events table in the CEP database, Analytics should be able to see custom fields. And if not, CEP would be a union/join away from enabling that in BLUEcloud Analytics.

Resources to find out more

SirsiDynix has provided some on-demand video overviews of CEP (registration required).

<http://go.sirsidynix.com/2021-01-12-CEP-Product-Overview.html>

OCLC Wise

Leadership

SWAN spoke with Scott McCausland, OCLC Executive Director about Wise.

Product overview

Wise is a full replacement for the ILS and discovery platform. Wise can also replace other 3rd party functions the library uses as well—collection development capabilities, etc.

The Wise web-based administrative interface has many features found in traditional ILS. The Wise content management system website is not required but was emphasized as a seamless experience to the user with requesting material and registering for events.

Wise's user online account overlaps with many ILS/OPAC features, such as listing checkout materials.

- View checked out material, renew material
- Hoopla and OverDrive e-content material checked out

Some interesting Wise features:

- “Relationships” options for a patron to add users (already present in Wise) to access each other’s accounts; no library staff intervention is required
- Setting up library events with e-tickets
- Sign-up for event alerts based on areas of interest; these categories are defined by the library

Staff administration interface is web-based and is called the “Wise Manager.” There is also a Marketing Workbench interface that manages the automated marketing segmentation.

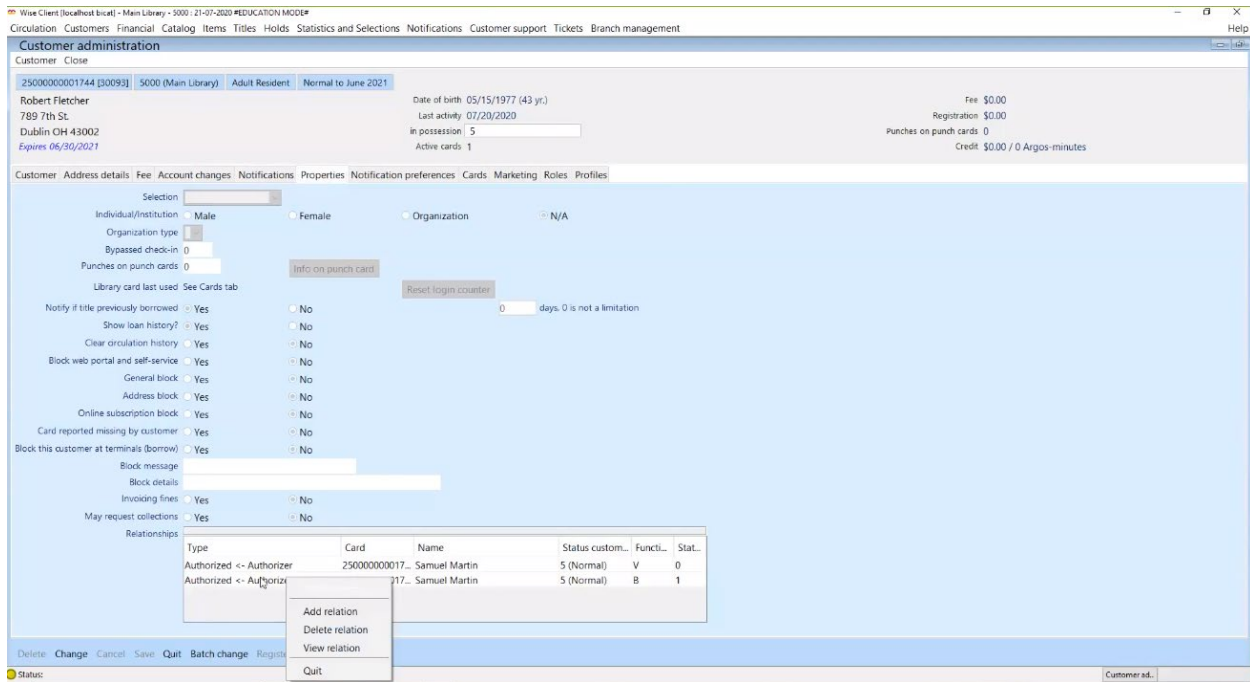


FIGURE 12: STAFF ADMIN INTERFACE (SCREEN CAPTURE FROM WISE ONLINE DEMO)

Wise is a holistic library services platform that is built from the user’s perspective. Wise is designed for public libraries. It can create targeted campaigns that are a series of events. Wise interface is in many areas of the library online experience, while seamless to the user, this does create some concerns around migrating this data from Wise to another library services platform as this is a somewhat new software platform.

Customers

No libraries in SWAN are using Wise as this is its own ILS platform. The Anythink Libraries in Colorado, Allen County Public Library, and Fayetteville Public Library have been cited by OCLC as customers of Wise.

Resources to find out more

“Empower your customers with OCLC Wise” (30-minute demonstration of Wise)

https://www.oclc.org/en/events/2020/empower_customers_Wise.html

“Get inspired with OCLC Wise” (30-minute presentation)

https://www.oclc.org/en/events/2020/Wise_overview_July.html

SWAN Analysis

The solutions provided by Patron Point and OrangeBoy Savannah are already in use within SWAN libraries. OCLC Wise is its own library services platform and would entail a library exiting the SWAN consortium.

Patron Point Analysis

The Patron Point implementation started Tinley Park with online library card registration. Tinley has email marketing running through Patron Point.

Patron Point could be used within SWAN libraries as a set of tools any member libraries could use, replacing some of the existing promotion and marketing solutions. Patron Point would do the following:

- Online patron registration that would be code widget the library could place on its own website; library districts with complex boundaries would have GIS data confine online registration to within their district.
- Email newsletter for member libraries (perhaps replacing a current e-newsletter such as MailChimp) that would be designed by individual library staff and utilize Patron Point’s intelligent marketing of how those patrons engage with Patron Point’s marketing
- User tracking and analysis of library email campaigns—open rates, click throughs; please note that this is *patron engagement with marketing*, not necessarily *patron engagement with library services provided*
- Welcome emails to newly registered patrons using a scheduled campaign of engaging a new cardholder in library services; all branded at the individual library level.

While Patron Point would say otherwise, SWAN and Patron Point would need design a resolution for the following:

- Creating segments of library users within a consortia arrangement would require some design specification and planning; CLEVNET noted this is a challenge within their implementation of Patron Point. SWAN should avoid being viewed as a “middle barrier” to member libraries that

would like to provide some more segmented engagement campaigns beyond the basics listed above.

- Replace all patron email notices (overdue, billing, etc.) using HTML with library branding; SWAN would need to resolve the issues where library patrons visit one or more libraries and currently receive a consolidated overdue notice without any specific library branding.

OrangeBoy Savannah Analysis

Savannah is a powerful tool for understanding library patron usage of libraries through gathering various usage reports on an automated schedule or through library staff uploading usage data from gate counters, computer reservation systems, etc. Savannah is designed more towards marketing staff who would be self-sufficient with the tools provided. SWAN has been able to provide routine scheduled data extractions for OrangeBoy for Oak Park and Downers Grove.

Savannah can provide the following to a library:

- Email newsletter for member libraries (again, replacing an existing e-news solution)
- Welcome emails to newly registered patrons
- Patron usage of the library based on registered home address, designed to reveal patterns and trends

Savannah is a solid choice and is powerful in its user analytics in that it builds its user activity off multiple data points, not just patron engagement to library marketing.

However, a consortia deployment of Savannah would present the following challenges:

- Individual library participation in providing Savannah manual data uploads
- Overseeing the automation of hundreds of data harvests based on the individual library choices (gate counters, computer reservation systems, Wi-Fi system usage stats, etc.);

SirsiDynix Community Engagement Platform Analysis

SirsiDynix Community Engagement Platform had its 1.0 general availability version release in July 2020 and its functions are closer to an events and programs system such as those provided by Communico. While CEP can be used to create emails promoting events, it is not inherently built upon automated marketing. During the early presentations of CEP by SirsiDynix there was an automated marketing component through Marketo, but this is no longer part of CEP 1.0. It is not clear if SirsiDynix intends CEP to have automated marketing as a future component of CEP.

The fact that CEP is utilizing data from BLUEcloud Analytics does limit its future potential in that it cannot write back directly to the Symphony ILS, such as registering e-library cards in Symphony. CEP will only work with SirsiDynix BLUEcloud and if SWAN chose to move away from those components, libraries would also have to move away from CEP.

For SWAN, it would be important for CEP to have the ability to limit its instance to those libraries using CEP via what SirsiDynix is calling regionalization within its CEP product roadmap. Because CEP is replying Analytics for its data, all of the user data in SWAN is basically there for CEP to use for marketing and promotion emails. This might prove to be difficult to implement for a small subset of SWAN libraries interested in using CEP.

The biggest advantage of CEP over the other engagement platforms is that it has the potential to be integrated easily and embedded within various SirsiDynix products, such as Enterprise, Mobile, or its BLUEcloud Staff.

OCLC Wise Analysis

OCLC Wise is not a recommended option for a SWAN member library simply because Wise would be a full replacement of SWAN's library services platform. Moving to Wise is essentially migrating to a new circulation system and catalog, i.e. leaving SWAN and becoming a standalone library. The eight Anythink Libraries in Colorado have moved to Wise as a full replacement of its prior catalog.

Recommendation & Next Steps

Adopting these engagement systems does mean the library would be moving towards monitoring a patron's usage of library services, which might present a "big brother" aspect to library marketing and promotion.

If the goal for SWAN member libraries is for the consortium to focus solely on making email notifications "prettier" with HTML and library branding, this can be achieved through SWAN's in-house development and expertise. This does seem to be the initial desire of libraries interested in the library engagement platforms. As noted in the analysis above, replacing SWAN generated patron notifications is not something SWAN or these vendors are prepared to integrate without considerable planning and resources.

We recommend that libraries follow a "walk, don't run" approach for the adoption of an engagement platform. Consider the following as the initial focus and features these platforms provide:

- Implement a patron registration using an online card sign-up, with some GIS parameters for complex library service areas
- Design marketing and promotion campaign for new library cardholders
- Create interest-based marketing on patron's selected reading subjects, authors
- Build segmented and targeted email newsletter marketing for library services and events

Libraries should evaluate the services an engagement platform provides and decide if current subscription services as duplicative and could be eliminated such as newsletters sent via MailChimp.

Key and critical to a successful implementation of OrangeBoy Savannah or Patron Point is member library involving SWAN during the service selection process. SWAN can provide libraries a reality-check on what

a sales demonstration of these services promises to provide, versus the reality of balancing library software technology, data security, and the bandwidth of personnel at a given moment.

The Ohio based CLEVNET consortium noted that having an integrated marketing platform supported at the consortia level was critical for many libraries that needed to have structured communication during the coronavirus pandemic. The consortium continues to run its own notification system running in parallel with its consortia implemented Patron Point.

Should interest among SWAN members in library engagement platforms grow, the Savannah or Patron Point platforms could be contracted for consortia-wide services, with SWAN providing centralized staff support and training. We could facilitate a library user group dedicated to inspiring each other through engagement/marketing campaigns. It would be important to create design specifications for OrangeBoy or Patron Point to have all user data imported into the marketing platform with some ongoing updates between the marketing platform and the SWAN ILS. Member libraries may have to forgo some options within these engagement platforms in order for all member libraries to benefit from a common, stable structure of the software platform.

EBSCO Group Purchase Year 1 Statistics

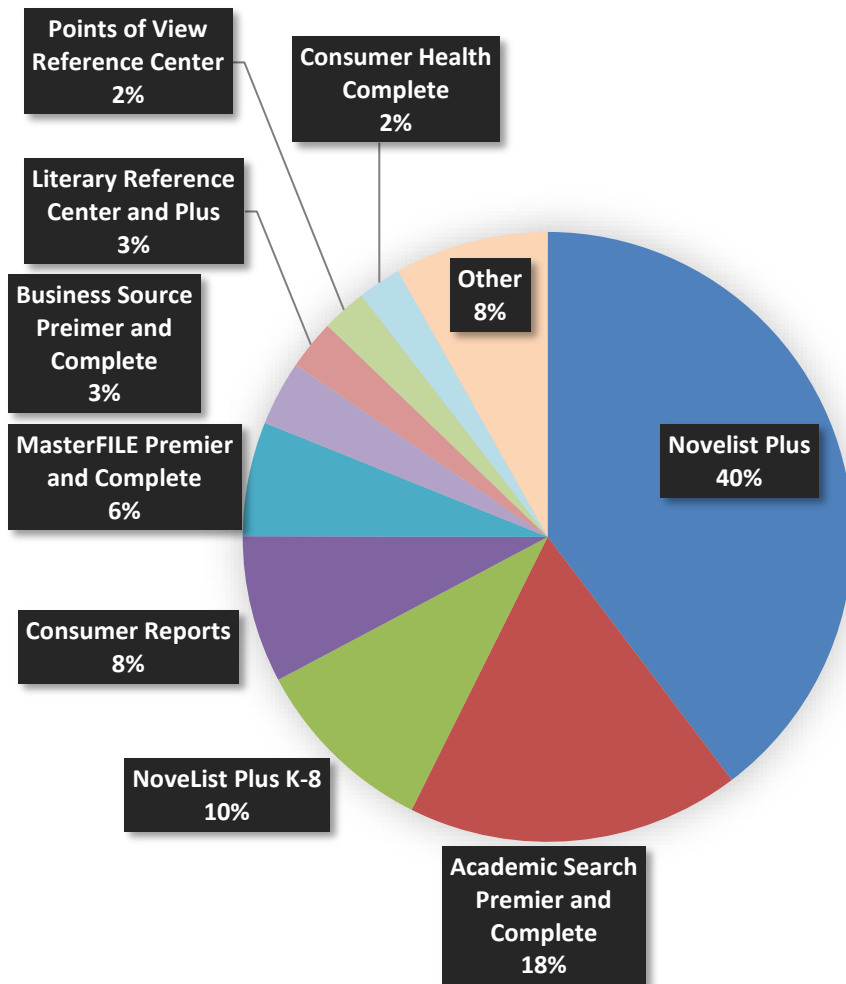
SWAN Electronic Resources Consultant Robin Hofstetter has compiled an analysis of the first year of the EBSCO group purchase, from July 2020 through June 2021. This set of statistics includes all 95 public libraries that participated in the first year of the group purchase, so keep in mind that we could potentially see an increase in cost-per-use and decrease in usage in year two, which reflects the 11 libraries that opted out.

These statistics reflect “Total Item Investigations”, which is a download of a full-text article. Consumer Reports and Auto Repair Source statistics use “Sessions” which is a log-in and use of the resource. These metrics are the closest equivalent to a checkout of a physical item; there is also the option to measure clicks, which would provide much higher numbers, but the metrics represented here give the truest picture of use.

Database	Totals
Novelist Plus	101197
Academic Search Premier and Complete	45083
Novelist Plus K-8	25192
Consumer Reports	19886
MasterFILE Premier and Complete	15466
Business Source Premier and Complete	8761
Literary Reference Center and Plus	6723
Points of View Reference Center	6048
Consumer Health Complete	5866
Hobbies & Crafts Reference Center	3178
History Reference Center	2864
Legal Information Reference Center	1878
Newspaper Source Plus	1877
Primary Search	1527
Science Reference Center	1360
Small Business Reference Center	1318
Middle Search Plus	1232

Database	Totals
Auto Repair Source	1230
Nonfiction Core Collection (H.W. Wilson)	1011
Education Research Complete	985
Biography Reference Bank (H.W. Wilson)	799
Middle and Junior High Core Collection (H.W. Wilson)	355
Fiction Core Collection (H.W. Wilson)	325
Read It!	237
Home Improvement Reference Center	220
Children's Core Collection (H.W. Wilson)	111
Public Library eBook Collection (EBSCOhost)	83
Vocational and Career Collection	78
Small Engine Repair Reference Center	73
Senior High Core Collection (H.W. Wilson)	60
Religion & Philosophy Collection	3
Poetry & Short Story Reference Center	0

Percentage of Total Use



A major goal of the SWAN EBSCO group purchase was to provide a set of standard reference resources for all SWAN libraries, especially as many libraries are focusing physical collection development efforts around popular resources. In the pie chart above, you can see that the “other” category – which includes any resources with 1% or less of total usage, totaling 20,804 uses – roughly matches total use of Consumer Reports, widely considered a popular resource that many libraries opt to provide their patrons. This is a major advantage of a group purchase bundle: For the cost of a few popular resources, the vendor includes additional niche resources that, in aggregate, find as much use as popular resources.

Also of note is that academic resources found a significant amount of use. Academic Search Premier and Complete accounted for 18% of total use while MasterFile Premier and Complete accounted for 6% of

use. Together they account for three times as much use as Consumer Reports – demonstrating that SWAN patrons are using databases for research purposes.

Below, you can see the cost-per-use in aggregate, and without Novelist Plus, which makes up a significant portion of use. While circulation of physical items and database use is not a one-to-one comparison, we have also included the estimated cost-per-use of books SWAN-wide based on item type and item cost under \$100 to eliminate incorrect price data and high-cost items, such as library-of-things materials, that may have a high cost-per-use.

EBSCO Database Cost-Per-Use

	EBSCO YR1	Full text borrows	Cost Per Use
EBSCO databases, full package	\$ 420,000.00	255026	\$ 1.65
EBSCO databases, excluding Novelist Plus	\$ 420,000.00	153829	\$ 2.73

SWAN Book Item Types Cost-Per Use

Limited to items with a cost between \$1 and \$100 and created since 1/1/2015 to account for potential incomplete migration data. When including all regardless of item created date, cost per use is \$2.78.

Count (Item Id)	Sum (Item Lifetime Renewals)	Sum (Item Lifetime Checkout)	Sum (Item Price)	Total Circ	Cost Per Use
2,814,011	8,392,871	14,761,162	53,658,019	23,154,033	\$2.32