



SWAN Tactical Plan

March 18, 2022

Presentation to SWAN Board

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Our strategic initiatives

Aaron Skog, SWAN Executive Director

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SWAN Strategic Plan 2019 - 2023

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6 Objectives

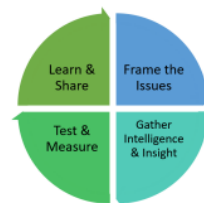
1. Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)
2. Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions
3. Reconstitute as a Mission Driven 501c3 with Clear Representative 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

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Objective 1: Shared & Accurate Diagnosis

Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)

1. Holds
2. Discovery & Access to Resources
3. Acquisitions Processing
4. Reports & Statistical Analysis
5. Support: Communications, Documentation, & Training



SWAN SHARED
DIAGNOSIS

Clarity Task Force Report

ABSTRACT
Gaining insight and developing collective ownership of problems

Clarity Task Force
November 2019

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6 Objectives: completed goals

Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)	Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions	Objective 3: Reconstitute as a Mission Driven 501c3 with Clear Representative Governance Practices	Objective 4: Increase Presence of the Patron Perspective	Objective 5: Strengthen the Collective Identity	Objective 6: Seek External Funding Options to Support the Research & Development Initiatives of SWAN
<ul style="list-style-type: none"> Form operational think tank, aka Clarity Task Force Assess discovery platform & provide recommendation Implement new discovery platform (Aspen) Curriculum of training for library staff Study ILS processing inefficiencies Expand online documentation Initiative for online self-paced training Institute monthly office hours for key applications and services <p>March 18, 2022</p>	<ul style="list-style-type: none"> BLUEcloud Mobile app Offer e-content group purchases Perform assessment of BLUEcloud Acquisitions Automate delivery in-transit label Migrate servers & services from RAILS to SWAN infrastructure Develop AV item type recommendations Establish parameters for Fine Free Build "Your Library Statistics" monthly report Implement Pseudo Libraries for drive-up and locker pick-up Automate monthly removal of inactive patron records Build OCLC Holdings Manager 	<ul style="list-style-type: none"> Evaluate organization legal entity Revise budget structure <p>SWAN Library Services</p>	<ul style="list-style-type: none"> Develop & deploy online patron registration Incorporate patron help into public catalog Increase protection of patron personal identifiable information (PII) Develop accessibility standards 	<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 	<ul style="list-style-type: none"> Interviews with EveryLibrary Provide information sessions and opportunities to collaborate on grants

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Primary Goals for 2022

Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)

1. Aspen Discovery
2. BLUEcloud
3. Cybersecurity

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

- Restick printer purchase

Objective 5: Strengthen the Collective Identity

- SWAN Expo 2022

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Aspen Discovery

Tactical Plan Goals for 2022

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Mobile App

BLUEcloud Mobile
Aspen LiDA (Library
Discovery App)

Goals:

- Evaluate the current feature sets of both apps
- Define a minimum feature set needed for a migration to Aspen LiDA
- Identify rollout strategies, balancing costs, customization, and time commitment for library staff

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Mobile App Feature Survey with DUX

Feature	Score
Consistent keyword search results between the app and the catalog	85%
A consistent holds experience between the app and the catalog (holds on grouped records)	83%
A consistent account experience between the app and the catalog	81%
Linked cards (store multiple library cards in the app)	81%
Consistent search facets between the app and the catalog (subject, availability, etc.)	79%
Consistent display of record details between the app and the catalog	73%
Library specific links (to your website, events, etc.)	71%
Library specific branding (customize logos, colors, etc.)	69%
Fines payment in the app	69%
Alerts (e.g. holiday closings)	67%
Access to eBooks and streaming content in the app	67%
Push notifications for hold pickup, etc.	60%
Consistent display of my library's browse categories in the app and the catalog	54%
Calendar integration	52%
Self checkout in the app	42%
My library's name on the app in the app stores (Google Play, Apple App Store)	42%
Novelist and supplemental content in the app	38%

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Ongoing Membership Engagement

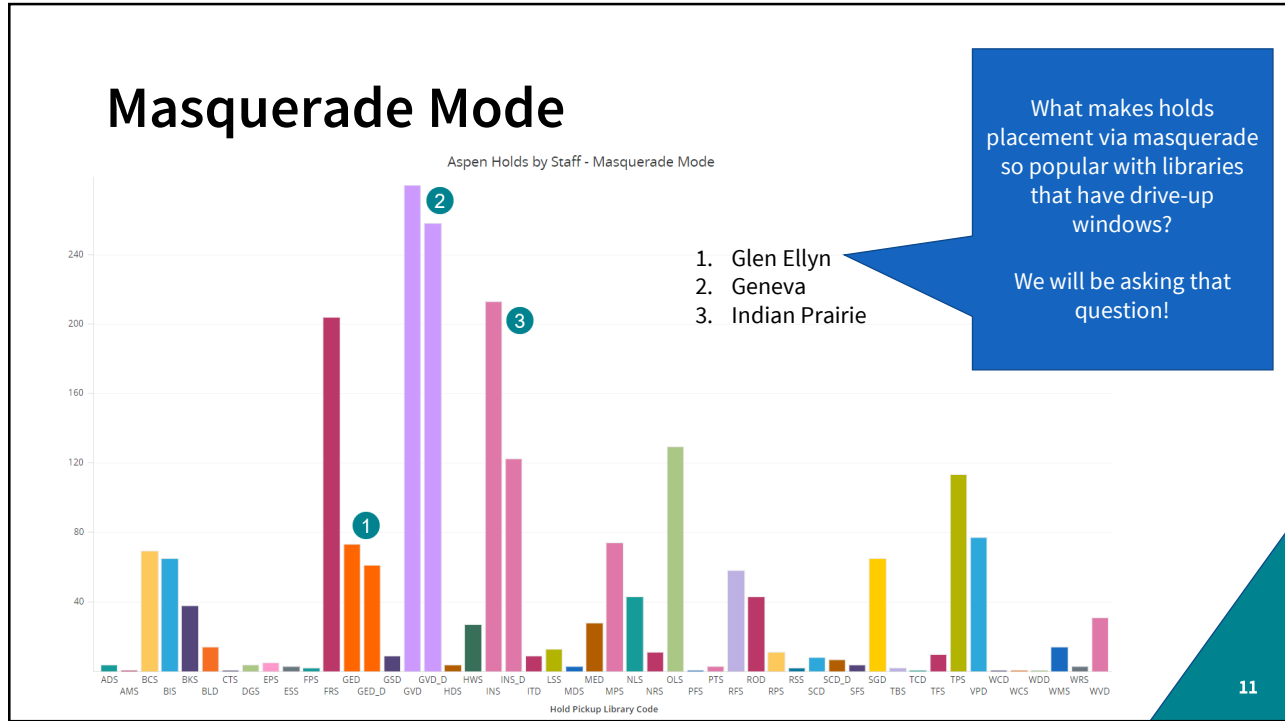
- Monthly Aspen Office Hours
- Usability testing for new features and improvements
- Release updates for major releases
- Prioritizing new feature requests in the Discovery and User Experience Group
- Identifying additional collaboration opportunities

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PayPal Integration

- 21 libraries using their own PayPal accounts
- 74 libraries using the SWAN PayPal account
 - Processing payments monthly Jan – June, quarterly Sept, Dec
 - March distribution checks to 17 libraries totaling \$1,362.26 processed

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Final Steps for Enterprise

- Redirect catalog.swanlibraries.net to Aspen April 24th
- Enterprise access ends April 30th
- Update all SWAN websites to remove Enterprise links and documentation
- BLUEcloud Mobile and eRC access continue

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BLUEcloud

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BLUEcloud Acquisitions in Production

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- From success of BLUEcloud Acquisitions pilot in 2019, 3 new libraries joining SWAN in December 2020 went live in BLUEcloud Acquisitions
- SWAN team and production use libraries worked with SirsiDynix to address duplicate issues in loading records (largely resolved in Fall 2021)
- Waiting on fixes with BLUEcloud Acquisitions
- Cases opened with SirsiDynix, escalated via SWAN's assigned Library Relations Manager

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BLUEcloud Cataloging Pilot

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- Increased collaboration between cataloging and acquisitions processing (combined User groups)
- Development of templates to target specific tasks – no longer one tool fits all

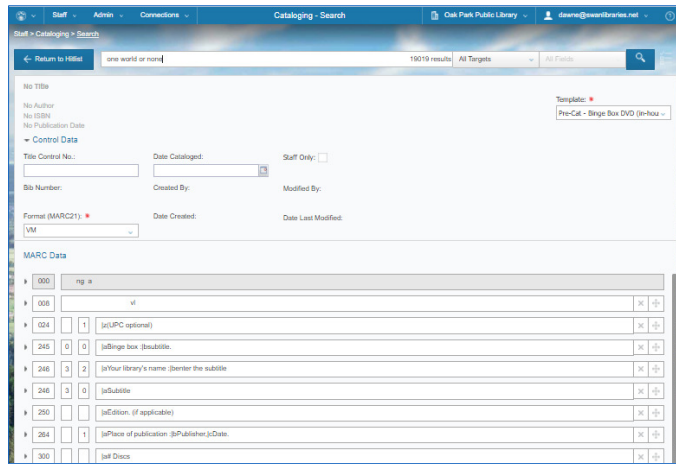
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Pilot Goals

- Guiding consistent and rich metadata creation at all phases of record entry
- Self-documenting templates
- Helping staff at all levels of materials processing
- Streamlining processing



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BLUEcloud Circulation Pilot

- Circulation Advisory Group focus for 2022
- Budget impact
 - Printers \$34K
 - Directory tools \$6K
- Eisenhower using as primary circ tool

Trans Stat Client Type	Trans Stat Station Library	Trans Stat Year	2022			Total
			1	2	3	
BcCirc	AMS	Number of Statistical Transactions	24			24
	BJS_SD167	Number of Statistical Transactions			4	4
	BLD	Number of Statistical Transactions	1			1
	CSD	Number of Statistical Transactions	6			6
	EPS	Number of Statistical Transactions			4	4
	ESS	Number of Statistical Transactions	724	4,269	2,114	7,107
	GJS_SD140	Number of Statistical Transactions			3	3
	HWS	Number of Statistical Transactions	11	4		15
	LGS	Number of Statistical Transactions		2		2
	SWS	Number of Statistical Transactions	8	1	14	23
	Total	Number of Statistical Transactions	774	4,276	2,139	7,189

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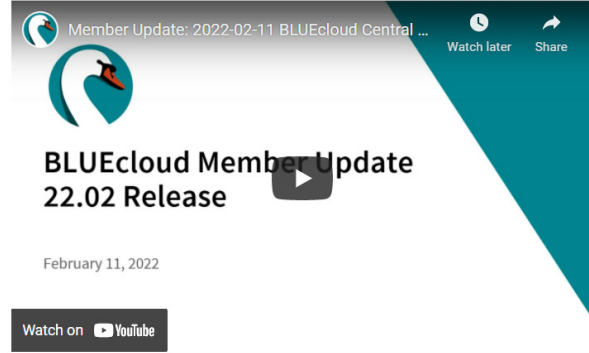
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SWAN Member Library Engagement

- BLUEcloud release update meetings
- Circulation Advisory

Presented by:
Crystal Vela, Consultant, User Experience, SWAN



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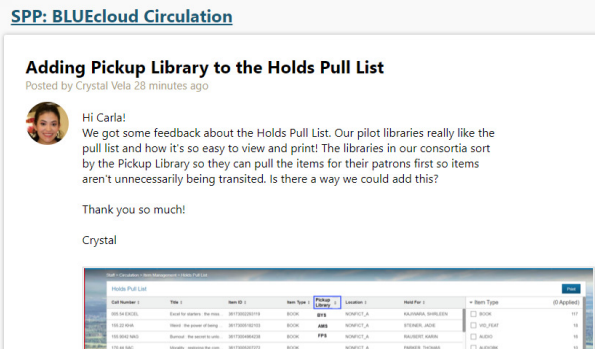
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SirsiDynix partnership

- SirsiDynix Strategic Partners Program (SPP) with South Australia Public Library Network (SAPLN) proposed by Berit Nelson, SirsiDynix
- Direct contact with SirsiDynix developers



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Partnership & Pilot

- Single sign-on pilot for secure authentication and user management in BLUEcloud Central
- Highlights security initiative within the changing application landscape



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Cybersecurity

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Associated Projects

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- Sikich Risk & Cybersecurity Assessment
 - ✓ Sikich interview and assessment process
 - NIST SP 800-171 policy, process drafting
 - Establish Incident Response Team (IRT)
 - Audit servers/networks against SWAN-NIST policies
- ✓ Monthly Patron Purges / 2021 NCOA
- ✓ Regular email phishing training for SWAN staff
- SonicWall Firewall Updates
 - ✓ Multi-Factor Authentication for SWAN servers and SonicWalls
 - ✓ SonicWall hardware replacements, 2021
 - New SonicWall self-maintainer libraries
- System Monitoring Tools
 - Zabbix System Monitoring to replace Cacti
 - Investigation of Azure/M365 subscription security tools
 - Investigation of Managed Detection and Response (MDR) security alerting services
- R&D of membership-wide directory services and single sign-on (SSO)
 - SirsiDynix BLUEcloud Pilot
- SirsiDynix audit of Symphony policies, roles and permissions
- Review SWAN 3rd party vendor integrations
 - Eliminate unsecured SIP2 integrations
 - Audit vendor agreements
- Education & Partnerships
 - Outreach to library community partners to brainstorm cybersecurity
 - Education push to member libraries at SWAN events
- Budget impact: \$19,200 in #5830 Consulting
 - vCISO, security monitoring tools

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Partnerships

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- SWAN work on accessibility
 - RAILS Voluntary Product Accessibility Template (VPAT)
- Diversity, Equity, & Inclusion in metadata – statewide networking group
- OHM & OCLC WorldCat holdings
 - Reset for 6 LLSAPs
 - 25% of the 104 million holding records for Illinois
- Illinois Digital Archives & digitization grants (Illinois State Library)
- ByWater/Aspen Community
- SirsiDynix Strategic Partners, Consortia-SIG

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Research & Development

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Activities

- Materials processing work flows
 - Roaming collections (modify how B&T Rental collection is shared and assess hold fulfillment efficiency)
 - Pre-processing / centralized ordering
- Beanstack reading tracking app/web
- BTCat – Baker & Taylor Cataloging tool
- OCLC - WorldCat and WorldShare enhancements/customization
- Book Club Kit Sharing – further development for accessibility

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Questions & Clarifications

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