



SWAN Committee of the Whole Meeting Directors & Administrators

Tuesday, October 4, 2022

10:00 a.m. – 12:00 p.m.

Virtual meeting link: Join Zoom Meeting

<https://us06web.zoom.us/j/85941462672?pwd=aENFWjZQcW9jbnZkcUZRM3FrNkN1dz09>

Agenda

1. Call to Order
2. Introduction of Visitors
3. Discussion –MessageBee service proposal
4. Next Membership Meeting: SWAN Quarterly December 1, 2022
5. Adjourn

Please note: this meeting will be recorded and posted on the SWAN Support site

Unified Messaging Service: MessageBee Proposal

Aaron Skog, SWAN Executive Director

September 1, 2022 SWAN Quarterly meeting

Introduction

SWAN provides libraries a set of notification options for library users. The approach has been to give the individual users a choice in how they wish to be notified by their library.

- Text notification
- Email notification
- Voice notification
- Print notification (bills only – and for all patrons)

The notification platform has evolved over the years to use a contracted printing service with Unique Management for overdue notices and automated voice calls, and an SMS service with SirsiDynix for text notifications. The email notification originates from the Symphony ILS and is passed to a volume email service with SendGrid. The SendGrid system is also used by SWAN for other services that require email such as server alerts, distribution of aliased emails for subscription BLUEcloud Analytics reports, and SWANcom.

The ability to customize email notices to include local library branding and a polished look using HTML has eluded SWAN due to the limitations of email customization as part of Symphony. Library staff do not have the tools they need to verify the success or failure of emails and SMS sent. Our bounced email process is managed by daily reports sent via email to each member library. SWAN has created an email lookup tool using the SendGrid APIs which was well received by library staff who are often having to verify with library patrons that their notifications are succeeding or failing.

SWAN libraries are also starting to utilize services for user engagement, with several libraries contracting with Patron Point or Savannah OrangeBoy. These platforms have strengths in using HTML and templates for engagement campaigns but are weak in the area of being the notification platform for a single library or the entire consortium of SWAN.

There is however a service that Unique Management has begun offering that I believe will be an exciting enhancement to the existing user notification platform in place. As a trusted partner, Unique is providing SWAN libraries with services including print notices, voice notification, recovery/gentle nudge, curbside, and NCOA/geo-location lookup services. Also of importance, Unique and SWAN have developed secure and reliable file transfer of data to protect patron privacy.

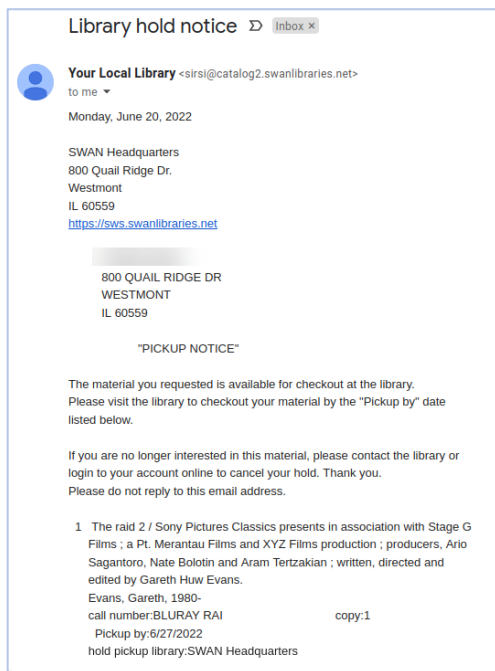
Description of the proposed services

The service as we envision it for libraries would be to provide access to each library to have the ability to customize areas of the HTML notice to library users. This would enhance the communication between libraries and its users, giving each SWAN member unique branding on the email being sent.

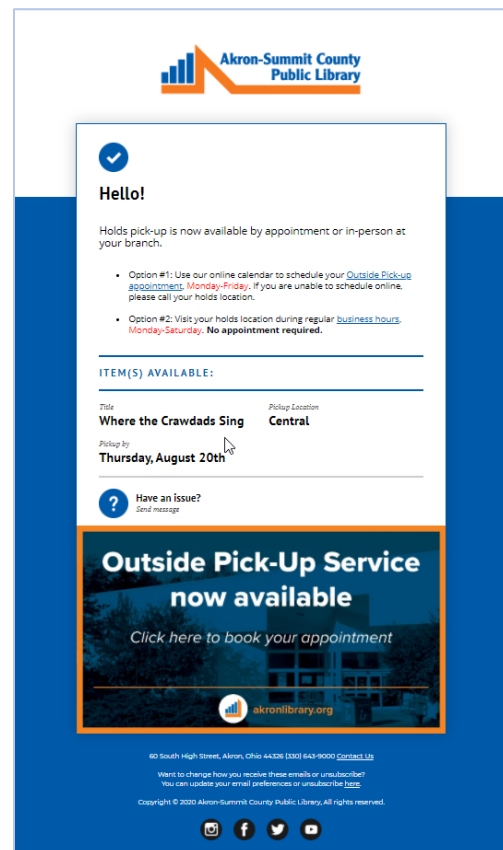
Part of the initial setup and configuration would include library branding. SWAN staff would work with Unique to build out base templates for all notices and branding in concert with the library's logo, color scheme, social media properties, and primary library resources/links. Each template would be tested for accessibility prior to deployment.

Samples below show the possibilities for customized, library-branded, and library header/footer feature announcements/links available through MessageBee. Additional samples can be [viewed online](#).

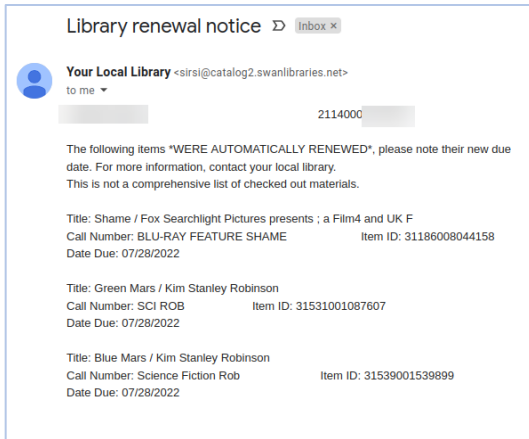
MessageBee for SWAN libraries would provide a set of tools with embedded marketing within the notification services. The examples below are some of those created by libraries within MessageBee's email template system.



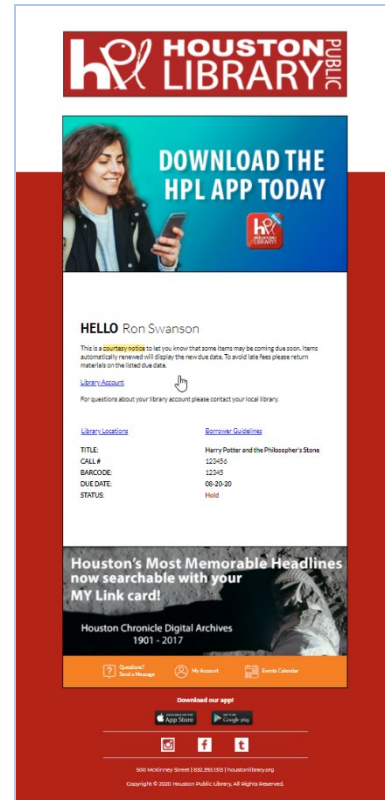
Current hold notice email



Sample MessageBee hold notice



Current renewal email



Sample MessageBee renewal email

Messages can also include book covers using existing cover art subscriptions. Research from [Brooklyn Public Library](#) showed an increase in return rate of items when a book cover image was included in the courtesy “almost due” email notice. From the article:

The team found out that providing better information and planning prompts were most effective, with the community-rallying messages least effective — because, Meyer theorizes, people already knew that others were waiting for their books. “It wasn’t that patrons didn’t want to be good library stewards and return their books on time,” she notes. It was because they didn’t know which books to bring back, or had trouble remembering when books were due.

*Before the intervention, about 59 percent of individuals receiving the standard courtesy notice — which were non personalized, with blunt language — returned their book on time. **Behaviorally informed courtesy notices with enhanced information about checked-out items, including the book titles and images of book covers, increased timely return by almost 10 percent.** BPL has made changes to reflect their findings, including a photo of the book jacket on overdue notices, with more engaging outreach and translations in four different languages.*

-- Brooklyn Public Library

Template and Monitoring Dashboard

Each library would have their own Unique dashboard. Within the dashboard, library staff would be able to customize featured messaging (e.g., highlight a program/event, spotlight a collection, introduce a

new service) and modify branding as desired. SWAN staff would have access to all dashboards to assist libraries in this work and set up initial templates.

The dashboard also includes a health monitor and detailed reports.



These detailed reported provide failed delivery and immediately pinpoint those patrons who did not receive an expected notice due to email or phone number issues. Daily, library staff can review failed messages to their own patrons and triage those communications and correct any problems in patron information.

07/01/2022 02:19 PM	+1708	Request Terminated	SWAN Hold - Phone
07/02/2022 11:19 AM	+1773	603	SWAN Overdue - Phone
07/02/2022 11:19 AM	+1773	603	SWAN Overdue - Phone
07/02/2022 11:19 AM	+1773	603	SWAN Overdue - Phone
07/02/2022 11:19 AM	+1708	200	SWAN Overdue - Phone
07/02/2022 11:19 AM	+1708	Not Found	SWAN Overdue - Phone

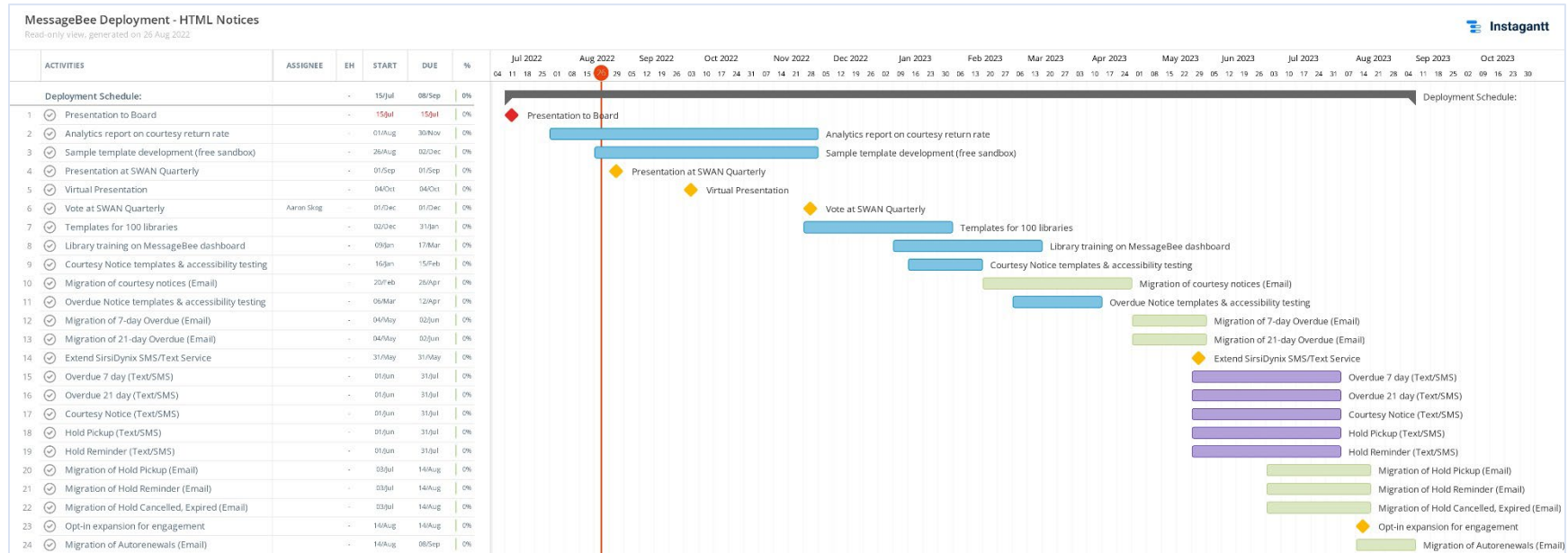
Comparison of current & proposed MessageBee

Feature	Current	MessageBee
SMS package	500K/year	100K/month
Email package	300K/month	350K/month
SMS notices	Contracted with SirsiDynix	Via MessageBee, as service provided by Unique Management
Email notices	Managed centrally by SWAN via "volume email service" SendGrid	Via MessageBee, as service provided by Unique Management
HTML Notices per library	Currently not implemented but possible, with limited features & only edited centrally by SWAN	Yes. Web based templates per library with individual branding
Email notice templates	No	Yes
Ability for library staff to modify email notice template	Only SWAN staff can modify	Yes
Web Portal to view activity & usage statistics	No	Yes
Verify email notice status	Yes, with SWAN custom email lookup web app	Yes, in MessageBee dashboard
View email bounce, delivered, open, sent	No	Yes
Ability to send special SMS or email alert	Yes	Yes
Print notices	Managed centrally by SWAN	Not managed in MessageBee, but already supported by UMS
Phone notifications	Currently using MessageBee	Currently using MessageBee
Verify email notice status	Yes, with SWAN custom email lookup web app	Yes
Total Cost for all 100 libraries each year (included in membership)	\$16,900	\$68,686

Proposed Project Plan

The implementation plan would include approval by SWAN Board and Membership prior to any contracted services. If approved, base templates for each library matching their current identity as customized in the Aspen catalog will be created. These templates will be tested for accessibility. Training in use of library-specific design templates and monitoring through the library-specific dashboard will be provided.

Notices will be migrated gradually to provide ample testing and tracking of changes. Email notices are shown in green and text/SMS notices in purple in the Gantt chart.



Detailed task outline

The project would be led by Michael Szarmach for scheduling and deployment of specific notices. The User Experience team will be key in accessibility testing and content review of messaging. Documentation and training responsibilities will be shared across several staff as the project progresses.

Deployment Schedule:			-	15/Jul	08/Sep	0%
1	✔ Presentation to Board		-	15/Jul	15/Jul	0%
2	✔ Analytics report on courtesy return rate		-	01/Aug	30/Nov	0%
3	✔ Sample template development (free sandbox)		-	26/Aug	02/Dec	0%
4	✔ Presentation at SWAN Quarterly		-	01/Sep	01/Sep	0%
5	✔ Virtual Presentation		-	04/Oct	04/Oct	0%
6	✔ Vote at SWAN Quarterly	Aaron Skog	-	01/Dec	01/Dec	0%
7	✔ Templates for 100 libraries		-	02/Dec	31/Jan	0%
8	✔ Library training on MessageBee dashboard		-	09/Jan	17/Mar	0%
9	✔ Courtesy Notice templates & accessibility testing		-	16/Jan	15/Feb	0%
10	✔ Migration of courtesy notices (Email)		-	20/Feb	26/Apr	0%
11	✔ Overdue Notice templates & accessibility testing		-	06/Mar	12/Apr	0%
12	✔ Migration of 7-day Overdue (Email)		-	04/May	02/Jun	0%
13	✔ Migration of 21-day Overdue (Email)		-	04/May	02/Jun	0%
14	✔ Extend SirsiDynix SMS/Text Service		-	31/May	31/May	0%
15	✔ Overdue 7 day (Text/SMS)		-	01/Jun	31/Jul	0%
16	✔ Overdue 21 day (Text/SMS)		-	01/Jun	31/Jul	0%
17	✔ Courtesy Notice (Text/SMS)		-	01/Jun	31/Jul	0%
18	✔ Hold Pickup (Text/SMS)		-	01/Jun	31/Jul	0%
19	✔ Hold Reminder (Text/SMS)		-	01/Jun	31/Jul	0%
20	✔ Migration of Hold Pickup (Email)		-	03/Jul	14/Aug	0%
21	✔ Migration of Hold Reminder (Email)		-	03/Jul	14/Aug	0%
22	✔ Migration of Hold Cancelled, Expired (Email)		-	03/Jul	14/Aug	0%
23	✔ Opt-in expansion for engagement		-	14/Aug	14/Aug	0%
24	✔ Migration of Autorenewals (Email)		-	14/Aug	08/Sep	0%

Future potential

The MessageBee platform provides additional library-specific engagement tools. Building off the existing MessageBee dashboard, mailing list segmentation and customized email campaigns can be set up. The engagement tools cost per library is \$480 per year, plus message costs. This is significantly lower than other engagement platforms due to the structure already in place and supported through MessageBee's platform for notifications.

Proposed Budget Approval

SWAN budget for Notification & Collection would be amended for current year and be paid for through reserve funds.

One-time Setup Costs	\$ 10,000
FY23 Budget Total MessageBee Operating Cost	\$ 27,257
#5860 Notification & Collection Additional Expense for FY23	\$ 37,257

The cost of MessageBee for SWAN for the next budget year FY24 would be \$63,686 and be added to the annual operating budget.

FY24 #5860 MessageBee Expenses (HTML Notices/SMS&Text)	\$ 76,686
SirsiDynix SMS/Text service subscription cancelled	\$ (13,000)
MessageBee Additional Annual Costs	\$ 63,686

Proposed presentation and approval of MessageBee includes a director's presentation and additional presentation for library staff with question and responses.

Friday, July 15, 2022	SWAN Board presentation
Thursday, September 1, 2022	Membership presentation with 100 library directors at SWAN Quarterly Membership meeting
September 2022 TBD	Virtual presentations to library staff with Q&A
Tuesday, October 4, 2022	Committee of the Whole meeting for library directors to review MessageBee and ask additional questions
Thursday, December 1, 2022	SWAN Quarterly Membership meeting with vote to approve funds for MessageBee one-time costs and budget amendment to revise FY23 operating expenses through June 30, 2023
Thursday, March 2, 2023	MessageBee year-2 approval within SWAN budget fiscal year 2024 for July 1, 2023 renewal through June 30, 2024
Monday, May 1, 2023	SirsiDynix SMS service officially ends \$13,000 annual subscription
Saturday, July 1, 2023	SWAN budget starts with MessageBee year-2 included in operating expenses, and prior services discontinued (SirsiDynix) or reduced (SendGrid)

SWAN Fee Chart with MessageBee expense

The fee chart is based on the current membership fees and the added expense of MessageBee to the SWAN operating budget.

SWAN Library	SWAN Fee Total with Addition of MessageBee	SWAN Fees Current	Fee with MessageBee
Acorn Public Library District	\$ 23,739	\$ 23,208	\$531
Alsip-Merrionette Park Public Library District	\$ 35,787	\$ 35,038	\$749
Batavia Public Library District	\$ 48,735	\$ 47,752	\$983
Bedford Park Public Library District	\$ 27,109	\$ 26,518	\$592
Beecher Community Library District	\$ 16,107	\$ 15,715	\$392
Bellwood Public Library	\$ 29,898	\$ 29,256	\$642
Bensenville Community Public Library District	\$ 28,881	\$ 28,258	\$624
Bensenville Elementary School District #2	\$ 17,500	\$ 17,500	\$0
Berkeley Public Library	\$ 16,927	\$ 16,520	\$407
Berwyn Public Library	\$ 46,831	\$ 45,882	\$949
Bloomington Public Library	\$ 42,682	\$ 41,808	\$874
Blue Island Public Library	\$ 24,875	\$ 24,324	\$551
Bridgeview Public Library	\$ 23,983	\$ 23,448	\$535
Broadview Public Library District	\$ 24,637	\$ 24,090	\$547
Calumet City Public Library	\$ 26,630	\$ 26,047	\$583
Calumet Park Public Library	\$ 14,621	\$ 14,256	\$365
Carol Stream Public Library	\$ 47,504	\$ 46,543	\$961
Chicago Heights Public Library	\$ 20,986	\$ 20,505	\$481
Chicago Ridge Public Library	\$ 26,868	\$ 26,280	\$587
Cicero Public Library	\$ 30,539	\$ 29,885	\$654
Clarendon Hills Public Library	\$ 20,810	\$ 20,332	\$478
Crestwood Public Library District	\$ 18,634	\$ 18,195	\$438
Crete Public Library District	\$ 30,728	\$ 30,071	\$657
Dolton Public Library District	\$ 23,678	\$ 23,148	\$530
Downers Grove Public Library	\$ 68,165	\$ 66,830	\$1,335
Eisenhower Public Library District	\$ 50,563	\$ 49,546	\$1,017
Elmwood Park Public Library	\$ 29,199	\$ 28,570	\$630
Evergreen Park Public Library	\$ 25,062	\$ 24,507	\$555
Flossmoor Public Library	\$ 26,591	\$ 26,009	\$582
Forest Park Public Library	\$ 31,837	\$ 31,160	\$677
Frankfort Public Library District	\$ 37,637	\$ 36,855	\$782
Franklin Park Public Library District	\$ 32,787	\$ 32,092	\$695
Geneva Public Library District	\$ 65,087	\$ 63,808	\$1,280
Glen Ellyn Public Library	\$ 55,144	\$ 54,044	\$1,100
Glenside Public Library District	\$ 45,144	\$ 44,226	\$918
Glenwood-Lynwood Public Library District	\$ 27,001	\$ 26,412	\$590
Grande Prairie Public Library District	\$ 27,778	\$ 27,174	\$604
Green Hills Public Library District	\$ 36,627	\$ 35,863	\$764
Harvey Public Library District	\$ 21,199	\$ 20,715	\$485
Hillside Public Library	\$ 26,054	\$ 25,482	\$573
Hinsdale Public Library	\$ 42,137	\$ 41,273	\$864
Hodgkins Public Library District	\$ 18,861	\$ 18,418	\$442
Homewood Public Library District	\$ 34,697	\$ 33,968	\$729
Indian Prairie Public Library District	\$ 50,348	\$ 49,335	\$1,013
Itasca Community Library	\$ 28,566	\$ 27,948	\$618
Justice Public Library District	\$ 16,135	\$ 15,742	\$393
Kaneville Public Library District	\$ 13,808	\$ 13,457	\$351
La Grange Public Library	\$ 37,722	\$ 36,938	\$784
LaGrange Park Public Library District	\$ 30,243	\$ 29,595	\$648
Lansing Public Library	\$ 36,210	\$ 35,454	\$757
Linda Sokol Francis Brookfield Library	\$ 35,926	\$ 35,175	\$751
Lyons Public Library	\$ 19,790	\$ 19,331	\$459

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The fee chart is based on the current membership fees and the added expense of MessageBee to the SWAN operating budget.

SWAN Library	SWAN Fee Total with Addition of MessageBee	SWAN Fees Current	Fee with MessageBee
Markham Public Library	\$ 19,470	\$ 19,017	\$453
Matteson Area Public Library District	\$ 36,655	\$ 35,891	\$765
Maywood Public Library District	\$ 25,498	\$ 24,935	\$563
McCook Public Library District	\$ 17,308	\$ 16,894	\$414
Melrose Park Public Library	\$ 23,750	\$ 23,219	\$531
Messenger Public Library of North Aurora	\$ 31,198	\$ 30,532	\$666
Midlothian Public Library	\$ 25,530	\$ 24,967	\$563
Morton Arboretum	\$ 12,500	\$ 12,500	\$0
Nancy L. McConathy Public Library District	\$ 15,454	\$ 15,073	\$381
National University of Health Sciences	\$ 11,000	\$ 11,000	\$0
North Riverside Public Library District	\$ 23,219	\$ 22,697	\$521
Northlake Public Library District	\$ 32,655	\$ 31,963	\$692
Oak Brook Public Library	\$ 22,707	\$ 22,195	\$512
Oak Lawn Public Library	\$ 67,588	\$ 66,263	\$1,325
Oak Park Public Library	\$ 106,990	\$ 104,951	\$2,039
Palos Heights Public Library	\$ 29,250	\$ 28,619	\$630
Palos Park Public Library	\$ 17,686	\$ 17,265	\$421
Park Forest Public Library	\$ 29,337	\$ 28,705	\$632
Prairie State College	\$ 21,000	\$ 21,000	\$0
Prairie Trails Public Library District	\$ 32,221	\$ 31,537	\$684
Richton Park Public Library District	\$ 22,016	\$ 21,516	\$499
River Forest Public Library	\$ 25,938	\$ 25,367	\$570
River Grove Public Library District	\$ 17,503	\$ 17,085	\$418
Riverdale Public Library District	\$ 17,404	\$ 16,988	\$416
Riverside Public Library	\$ 24,211	\$ 23,672	\$539
Roselle Public Library District	\$ 33,906	\$ 33,191	\$715
Schiller Park Public Library	\$ 23,750	\$ 23,219	\$531
South Holland Public Library	\$ 34,189	\$ 33,469	\$720
St Charles Public Library District	\$ 92,623	\$ 90,844	\$1,779
Steger-South Chicago Heights Public Library District	\$ 17,099	\$ 16,689	\$410
Stickney-Forest View Public Library District	\$ 23,933	\$ 23,399	\$534
Sugar Grove Public Library District	\$ 19,503	\$ 19,049	\$454
Summit Public Library District	\$ 16,392	\$ 15,995	\$398
Theosophical Society in America	\$ 12,500	\$ 12,500	\$0
Thomas Ford Memorial Library	\$ 27,432	\$ 26,834	\$598
Thornton Public Library	\$ 14,504	\$ 14,141	\$363
Tinley Park Public Library	\$ 68,453	\$ 67,112	\$1,341
Town and Country Public Library District	\$ 26,670	\$ 26,086	\$584
University Park Public Library District	\$ 18,764	\$ 18,324	\$441
Villa Park Public Library	\$ 34,794	\$ 34,063	\$731
Warrenville Public Library District	\$ 30,577	\$ 29,922	\$655
West Chicago Public Library District	\$ 35,682	\$ 34,935	\$747
Westchester Public Library	\$ 25,987	\$ 25,416	\$571
Westmont Public Library	\$ 32,735	\$ 32,041	\$694
William Leonard Public Library District	\$ 15,289	\$ 14,911	\$378
Wood Dale Public Library District	\$ 38,017	\$ 37,227	\$789
Woodridge Public Library	\$ 51,597	\$ 50,561	\$1,035
Worth Public Library District	\$ 20,953	\$ 20,473	\$480