



SWAN Quarterly Meeting

December 1, 2022

Agenda

1. Call to Order and Welcome
2. Public Comment
3. Introduction of new library directors
4. Approval of September 1, 2022 minutes
5. MessageBee proposal review
6. Amend the FY23 budget
7. Addison Public Library membership
8. Next year's FY24 budget update
9. Data visualization with GIS maps presentation
10. Holds time to fill & Aspen presentation
11. Announcements & Questions

MessageBee for SWAN

Aaron Skog, SWAN

MessageBee

Proposal for
membership vote
December 1, 2022




- Messaging Service provided by Unique
- SWAN currently uses it for phone notification and is proposing the use for HTML and SMS notices
- Patron notices would be under “one roof” in MessageBee Portal
- If approved, it will be for all SWAN libraries

MessageBee email notices

Current email notice

Library renewal notice 🔍 Inbox x

 **Your Local Library** <sirsi@catalog2.swanlibraries.net>
to me ▾

██████████ 2114000 ██████████

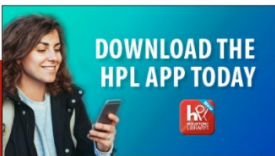

The following items ***WERE AUTOMATICALLY RENEWED***, please note their new due date. For more information, contact your local library.
This is not a comprehensive list of checked out materials.

Title: Shame / Fox Searchlight Pictures presents ; a Film4 and UK F
Call Number: BLU-RAY FEATURE SHAME Item ID: 31186008044158
Date Due: 07/28/2022

Title: Green Mars / Kim Stanley Robinson
Call Number: SCI ROB Item ID: 31531001087607
Date Due: 07/28/2022

Title: Blue Mars / Kim Stanley Robinson
Call Number: Science Fiction Rob Item ID: 31539001539899
Date Due: 07/28/2022

MessageBee email



DOWNLOAD THE HPL APP TODAY

HELLO Ron Swanson

This is a courtesy notice to let you know that some items may be coming due soon. Items automatically renewed will display the new due date. To avoid late fees please return materials on the listed due date.

[Library Account](#)

For questions about your library account please contact your local library.

[Library Locations](#) [Screening Guidelines](#)

TITLE:	Harry Potter and the Philosopher's Stone
CALL#:	22046
BARCODE:	1110
DUE DATE:	09-20-20
STATUS:	Hold

Houston's Most Memorable Headlines
now searchable with your
MY Link card!

Houston Chronicle Digital Archives
1901 - 2017

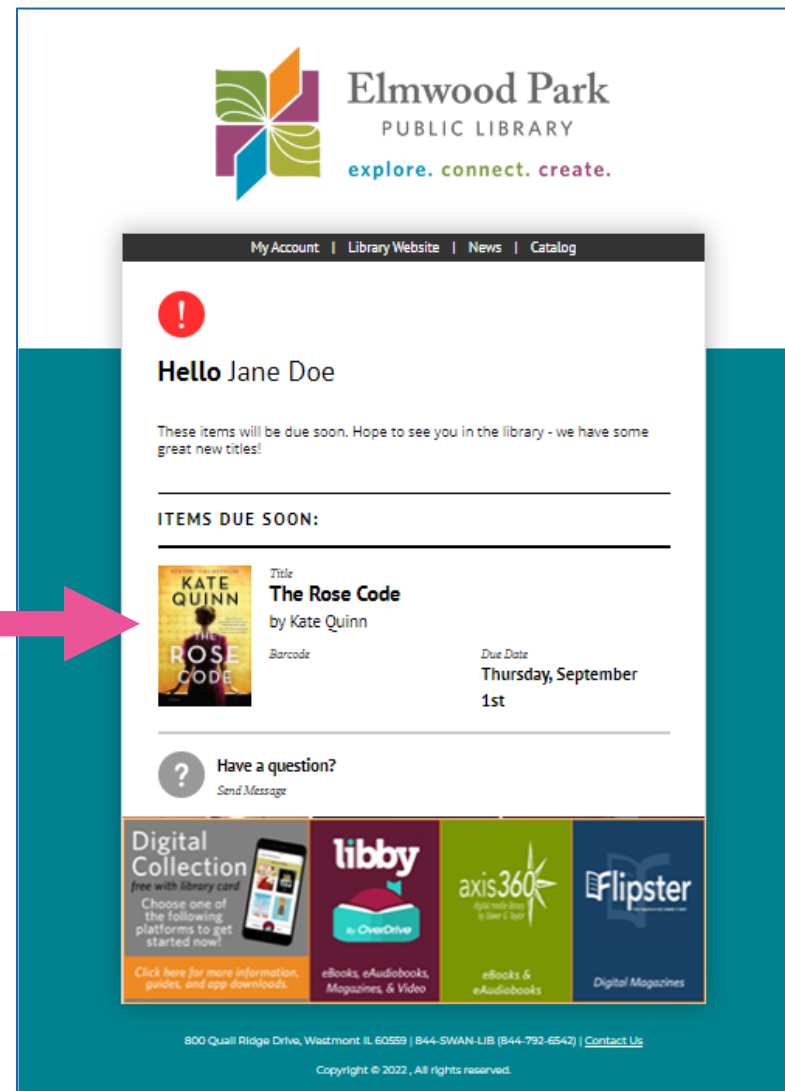
Download our app

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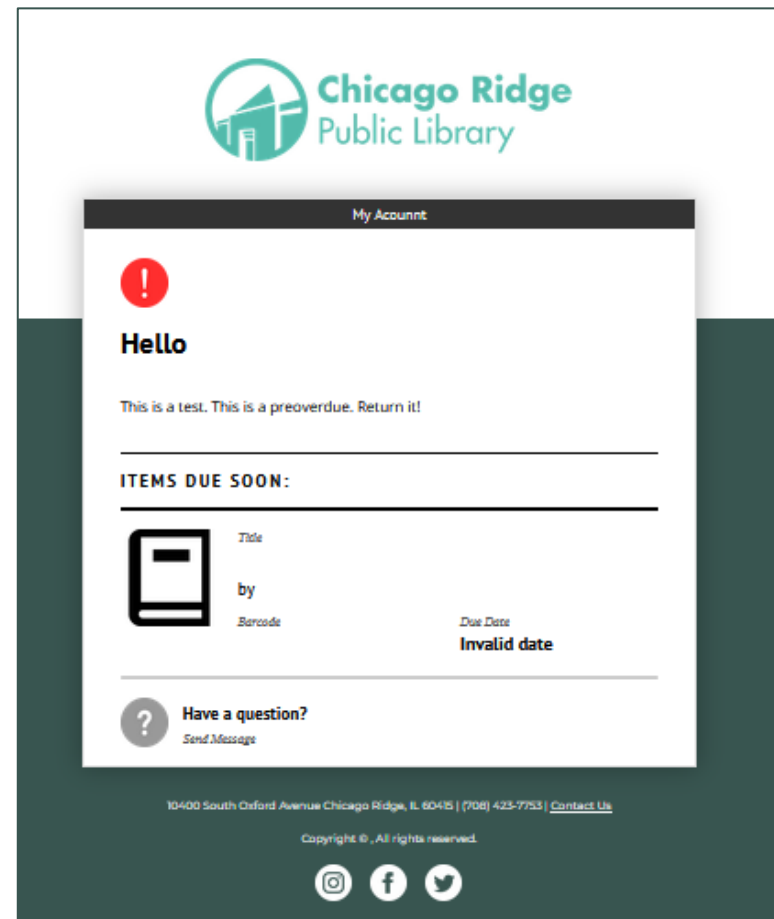
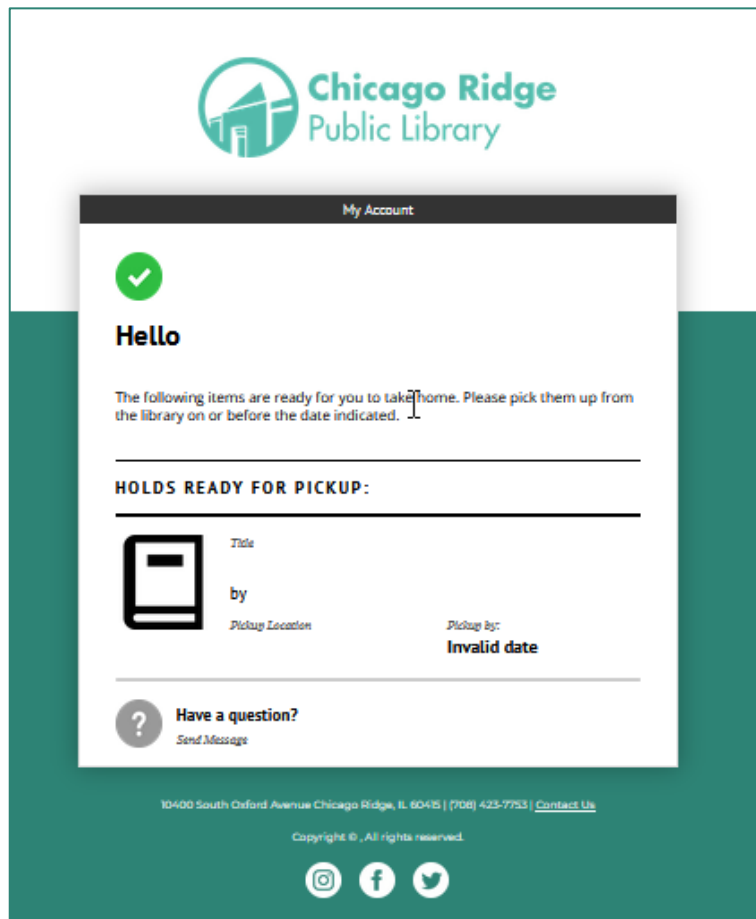
MessageBee integrates cover artwork

“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.”

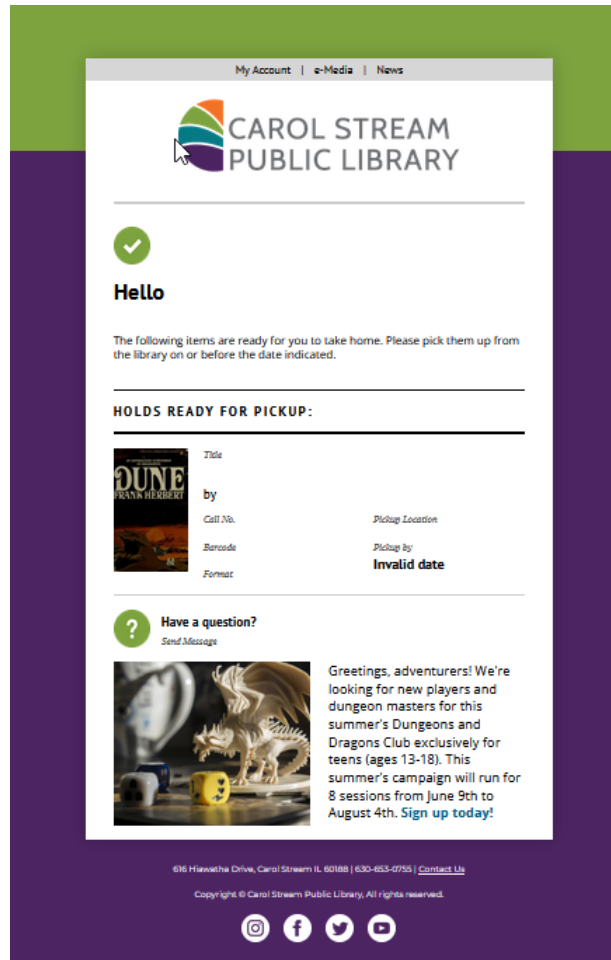
-- Brooklyn Public Library



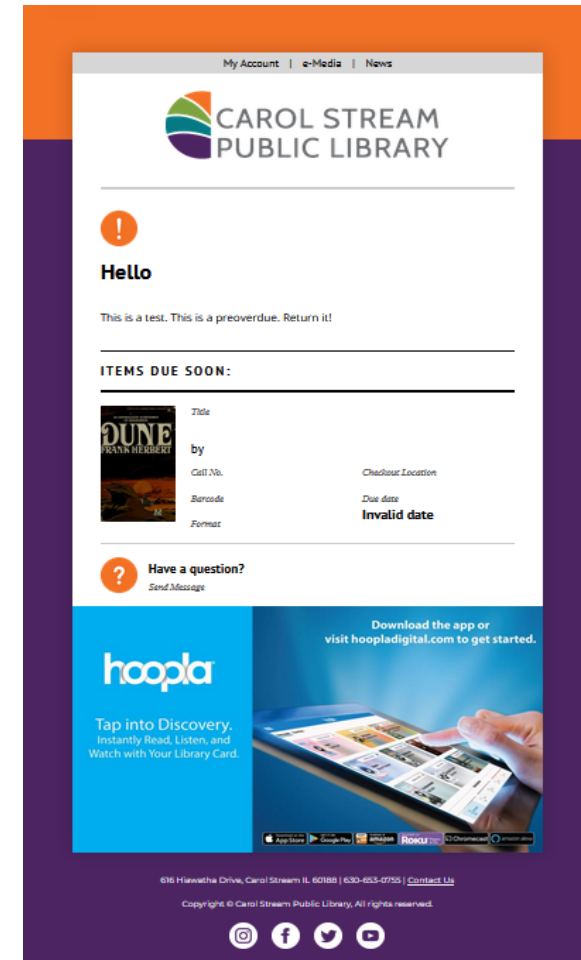
MessageBee email Notices continued



MessageBee email Notices continued

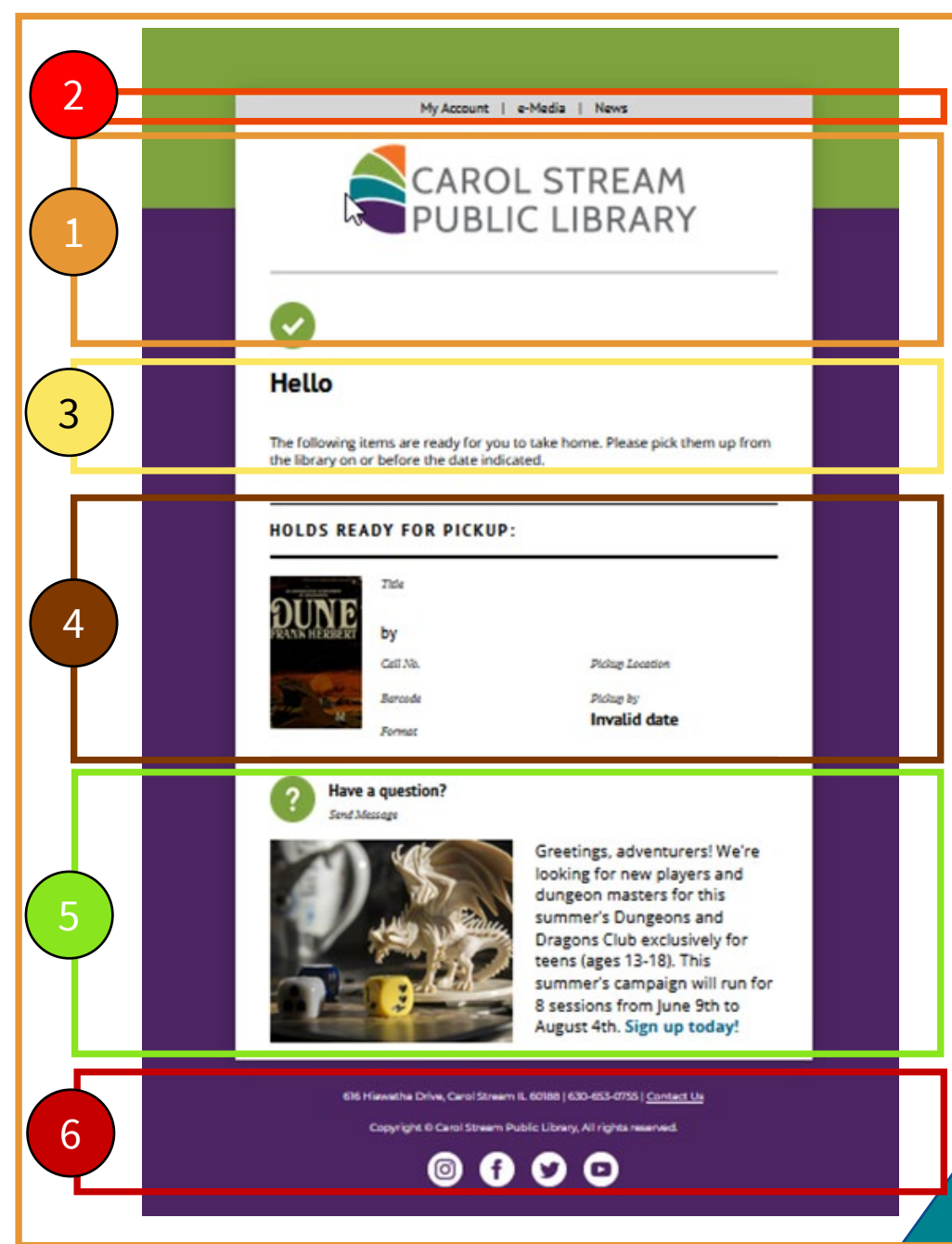
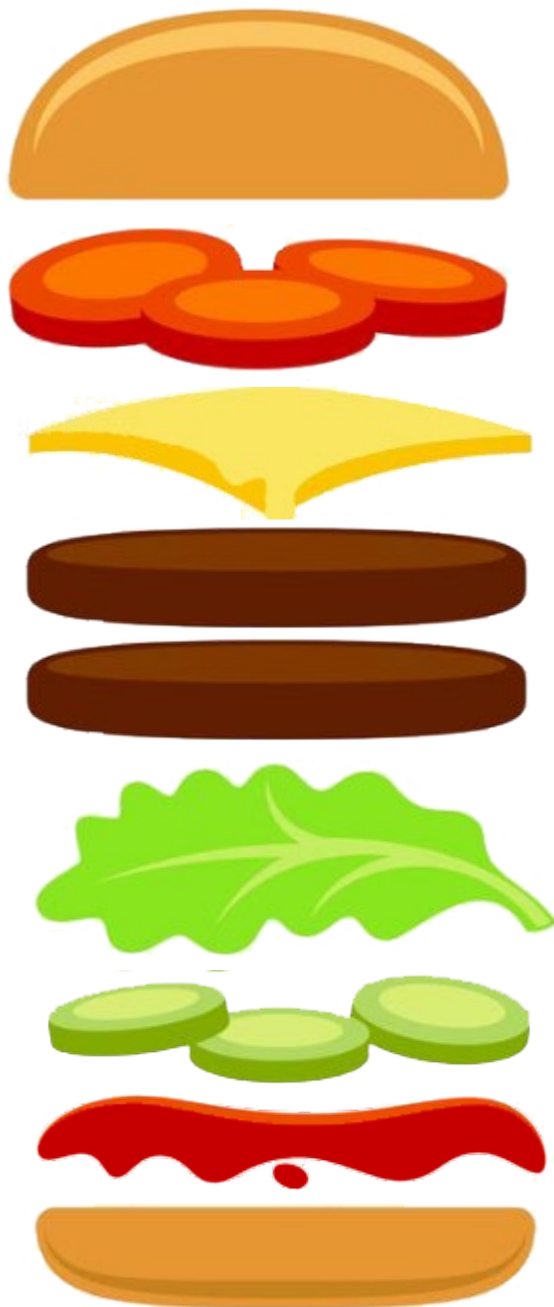


February 14, 2023



SWAN Library Services

1. Unique works with SWAN to bake the bread – template matching logo and color scheme
2. Library picks your favorite toppings for the menu bar
3. Library can add some special flavor/messaging
4. SWAN/Symphony provides the meat – the transactions drive the communication and template selection
5. Library adds seasonal topics that can be time sensitive
6. Library provides the base bun for consistency



MessageBee Portal

1. Channel – Email, Voice, Text
2. Time period
3. Notification Type (hold, courtesy, overdue)
4. Notification Sub-Type (voice, email, text)

SWAN Central MESSAGE BEE

Reports and Graphs

Note: This report contains data showing how many messages were opened and bounced for any given day. Hover over any point to learn more about that days activity.

Data

Date	Sent	Opt-Out	Successful	Failed
SWAN Overdue - Phone				
8/16/2022	68	0	63	5
8/17/2022	72	0	70	2
8/18/2022	82	0	79	3
8/19/2022	44	0	48	1
8/20/2022	46	0	46	0

Report Filters

Communication Channel:
1. Select a Communication Channel: All

Defaults (Predefined report filters):
2. Select a Default Report Filter: Last 14 Days

Notification Types/Sub-Types:
3. Notification Type: All
4. Select a Notification Type

Series:
bounce, click, delivered, open, sent

Dates:
Start Date: August, End Date: August

RETRIEVE REPORT DATA

Tracking Delivery

SWAN Central



Detailed Search

Search results:

Note: Click on any row to expand it and see all associated events.

Notification Time	Notification Final Status	Phone	Barcode	Notification Type	Preview
8/23/2022 11:29:10 AM	Failed	+1708[REDACTED]	215[REDACTED]	SWAN Overdue - Phone	
Failure Reason: Recipient Phone Not Reachable (480)					
8/16/2022 11:19:33 AM	Failed	+1708[REDACTED]	215[REDACTED]	SWAN Overdue - Phone	
Failure Reason: Recipient Phone Not Reachable (480)					

1. Search by Email, Phone #, or Barcode
2. Search terms
3. Notification Type (hold, courtesy, overdue)
4. Time span

Search Fields

Search Type:

1

Search Term:

2

Notification Types/Sub-Types:

3

Dates:

4
August August
S M T W T F S S M T W T F S
31 1 2 3 4 5 6 31 1 2 3 4 5 6
7 8 9 10 11 12 13 7 8 9 10 11 12 13
14 15 16 17 18 19 20 14 15 16 17 18 19 20
21 22 23 24 25 26 27 21 22 23 24 25 26 27
28 29 30 31 1 2 3 28 29 30 31 1 2 3

- Reports
- Report Downloads
- Communication Preferences
- Templates
- Detailed Search
- Settings

MessageBee text messaging

Current

- Libraries receive daily email from SirsiDynix with Excel attachment (contains barcode and phone number of patrons)



MessageBee

- Reported within MessageBee portal
- Cumulative archive of notifications, searchable



Bounced Emails

Current

- SWAN staff generate daily reports emailed to libraries to the library's SWAN email account (called aliased account)
- SWAN provided instructions to follow at the library
- Library can take action, or no action, on report list

MessageBee

- Library staff can log into the own MessageBee portal at any time as assigned duties
- View the status of emails within a date range
- Unsuccessful reasons listed
- Library can take action, or no action, on these unsuccessful notices

Voice call notifications

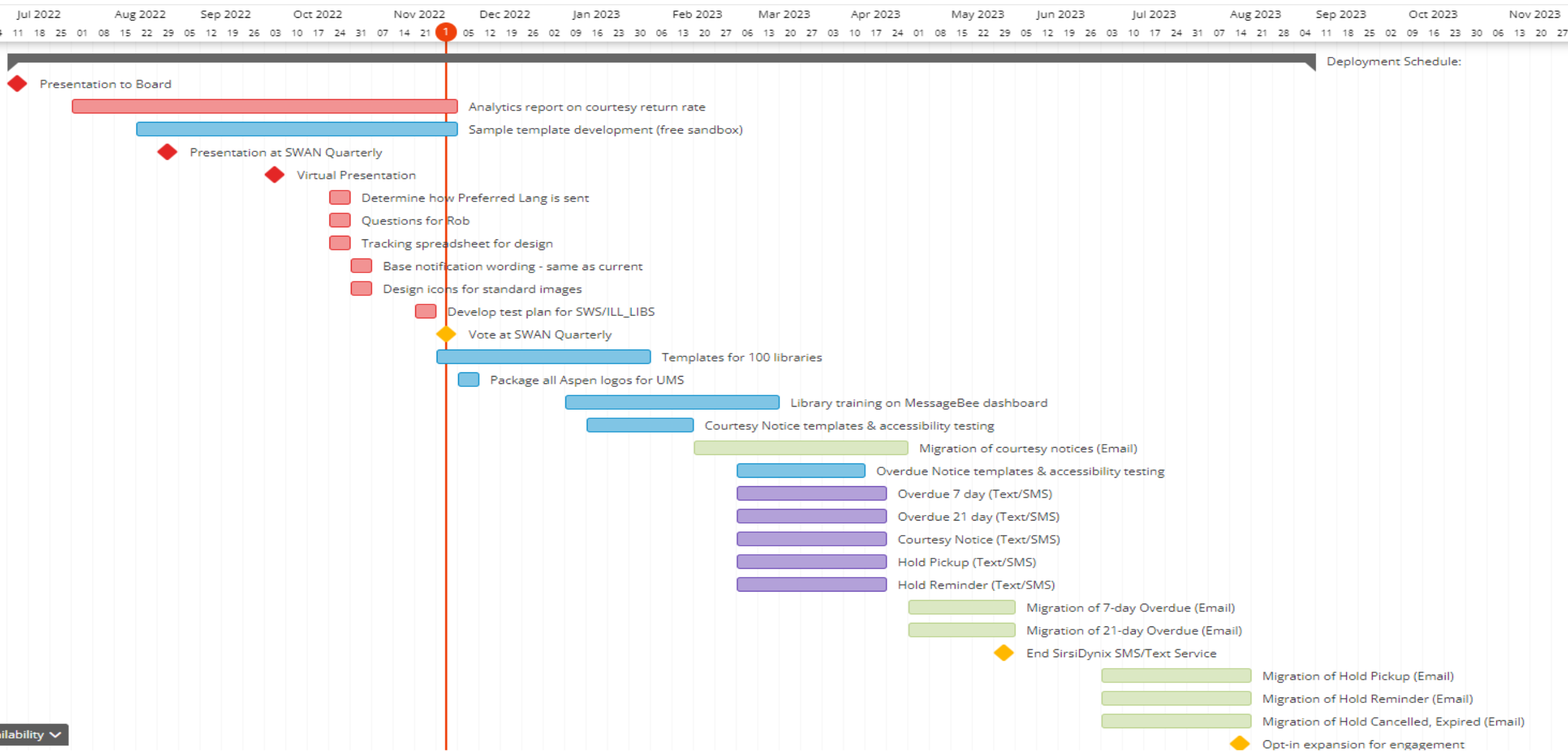
Currently

- SWAN has been using MessageBee voice notification since July 2021
- Single portal SWAN staff use to track usage, generate reports

MessageBee

- Goal is to have all library's voice notifications appear in their library's MessageBee portal
- When completed, each SWAN library will see email, text, and phone notices under a single web interface

Project timeline



Notification costs

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

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 approval process

Presentation to Board

- July 2022

COW meeting & Presentation

- October 4, 2022

SWAN Quarterly Presentation to Membership

- September 1, 2022

Vote at SWAN Quarterly

- December 1, 2022

Amend current FY23 budget

Amend FY23 budget with roll call

#5860 Notifications & Collections	\$16,900
MessageBee one-time setup costs	\$10,000
MessageBee operating cost through June 30, 2023	\$27,257
Total budget for Notifications & Collections	\$54,157

Proposed budget vote

RESOLVED, THE SWAN FISCAL YEAR 2023 BUDGET LINE #5860 NOTIFICATION & COLLECTION WILL BE INCREASED FROM \$16,900 TO \$54,157 FOR THE IMPLEMENTATION OF UNIQUE MANAGEMENT SERVICES MESSAGEBEE TO BE COMPLETED BY JUNE 30, 2023.

Addison Public Library

Aaron Skog, SWAN

Addison Public Library

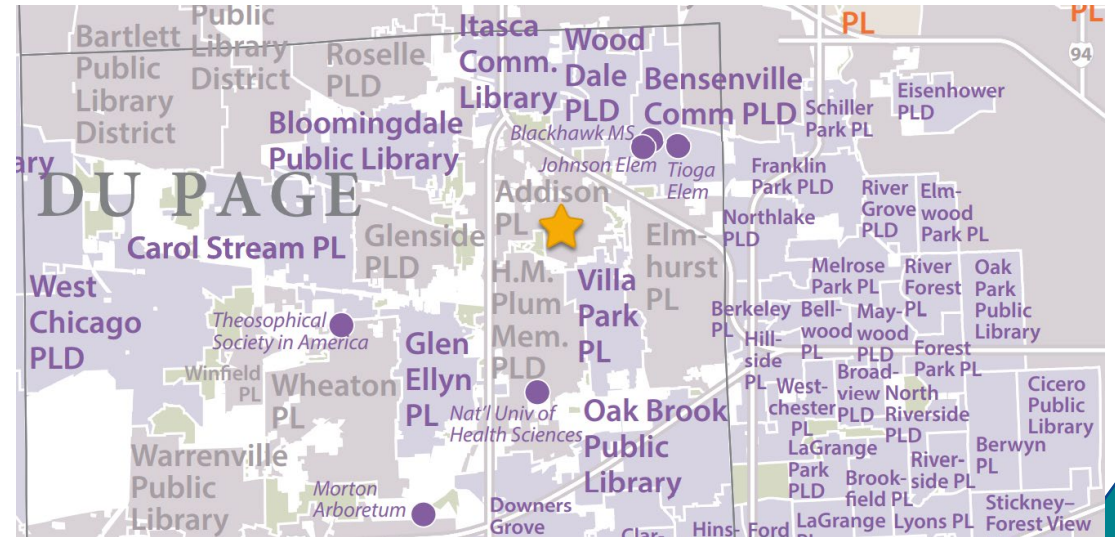
Library service pop 36,000

Membership fee est. \$70,367

5th highest in SWAN

Initial meeting took place October 2022

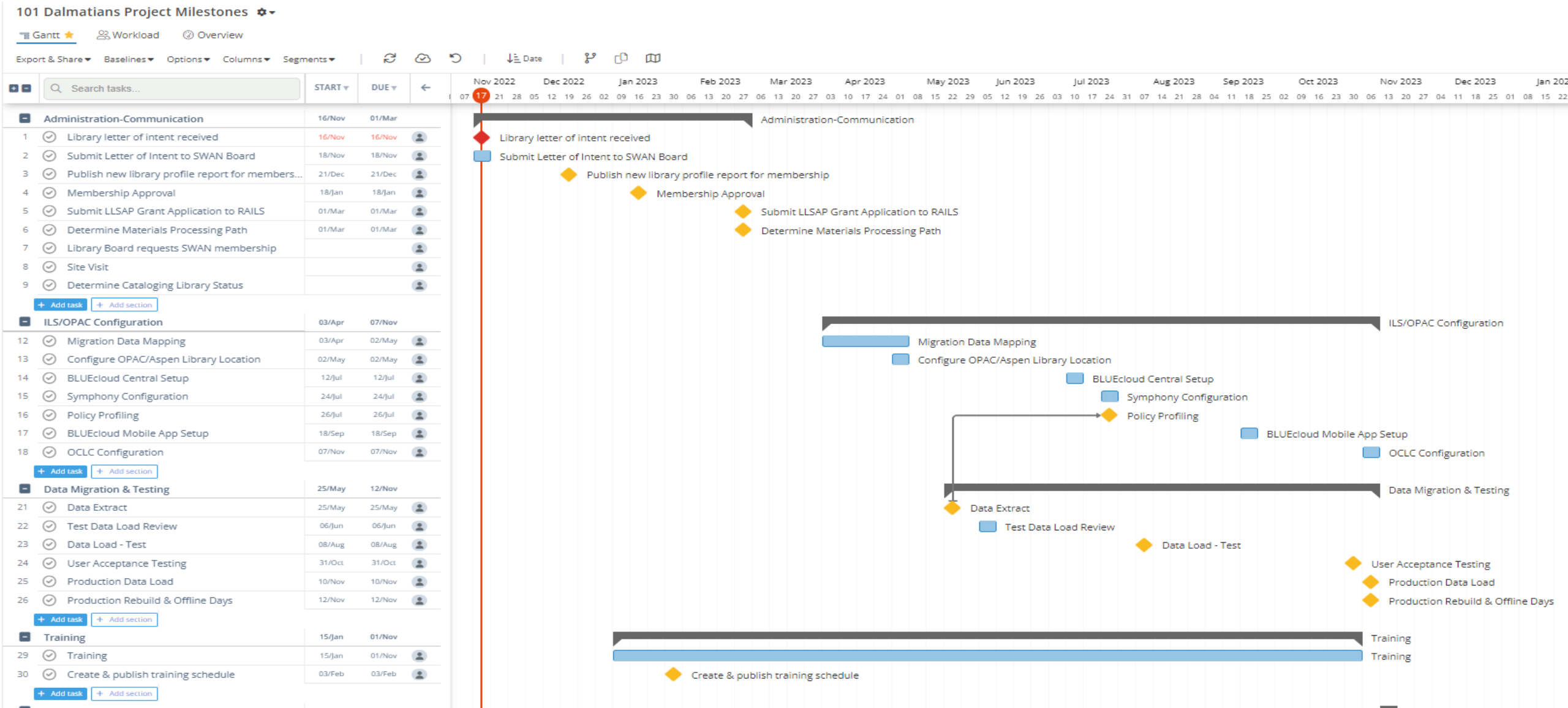
SWAN received a letter of intent to join (incl. in meeting packet)



Addison Public Library interest in joining SWAN

1. Provide cost estimate to interested library
2. Answer the library's questions about features, membership, etc.
3. Inform the SWAN Board
4. Inform the SWAN Membership
5. Provide interested library the SWAN agreement, set date for library trustee approval
6. Write recommendation & profile on library, discuss at membership meeting
7. SWAN Membership votes for admission (1 month): 67 affirmative votes for approval required
8. SWAN staff profile library data, extract and import data, provide library training, and design marketing material (6-8 months)
9. Library circulation & catalog go-live on SWAN

Project timeline: go-live November 2023



SWAN Budget process

Aaron Skog, SWAN

Budget process timeline

DATE	MEETING TYPE	ACTION ITEMS
September 1 - 30, 2022	Executive Director	Collect county tax data, submit FOIA to Cook County Treasurer for tax data.
Friday, October 21, 2022	Regular SWAN Board Meeting	Aaron begins work on budget, brings questions to SWAN Board if needed.
November 10, 2022	Finance Committee	Aaron Skog and Treasurer review Budget; SWAN potential policies are reviewed.
Friday, November 18, 2022	Regular SWAN Board Meeting	Board accepts financial audit. Aaron to bring budget draft; Board discuss Fees and determines next steps.
Thursday, December 1, 2022	Quarterly	Announce budget process
Friday, December 16, 2022	Regular SWAN Board Meeting	Review of budget draft. Approve RAILS LLSAP grant agreement
Sunday, January 1, 2023		Signed LLSAP grant agreements due to RAILS
Friday, January 20, 2023	Regular SWAN Board Meeting	Review and recommend draft of SWAN Budget for Membership presentation. Set COW date for February for membership review.
		Recommend Draft of SWAN Budget for Membership Presentation. Set Budget Meeting date for February for membership review.
January 2023 [TBD]	SWANcom	Board present draft budget to membership.
	SWANcom	Aaron Skog/Board announcement of draft budget to membership. Set February COW date and possible location of meeting.
February 2023 [TBD]	Membership Meeting	Meeting to discuss budget, fees, and reserves worksheet.
Friday, February 17, 2023	Regular SWAN Board Meeting	Incorporate changes, suggestions to SWAN budget. Create recommendation to membership.
Thursday, March 2, 2023	Quarterly	Roll call vote to approve SWAN budget.

Data visualization in GIS maps

Scott Brandwein, SWAN

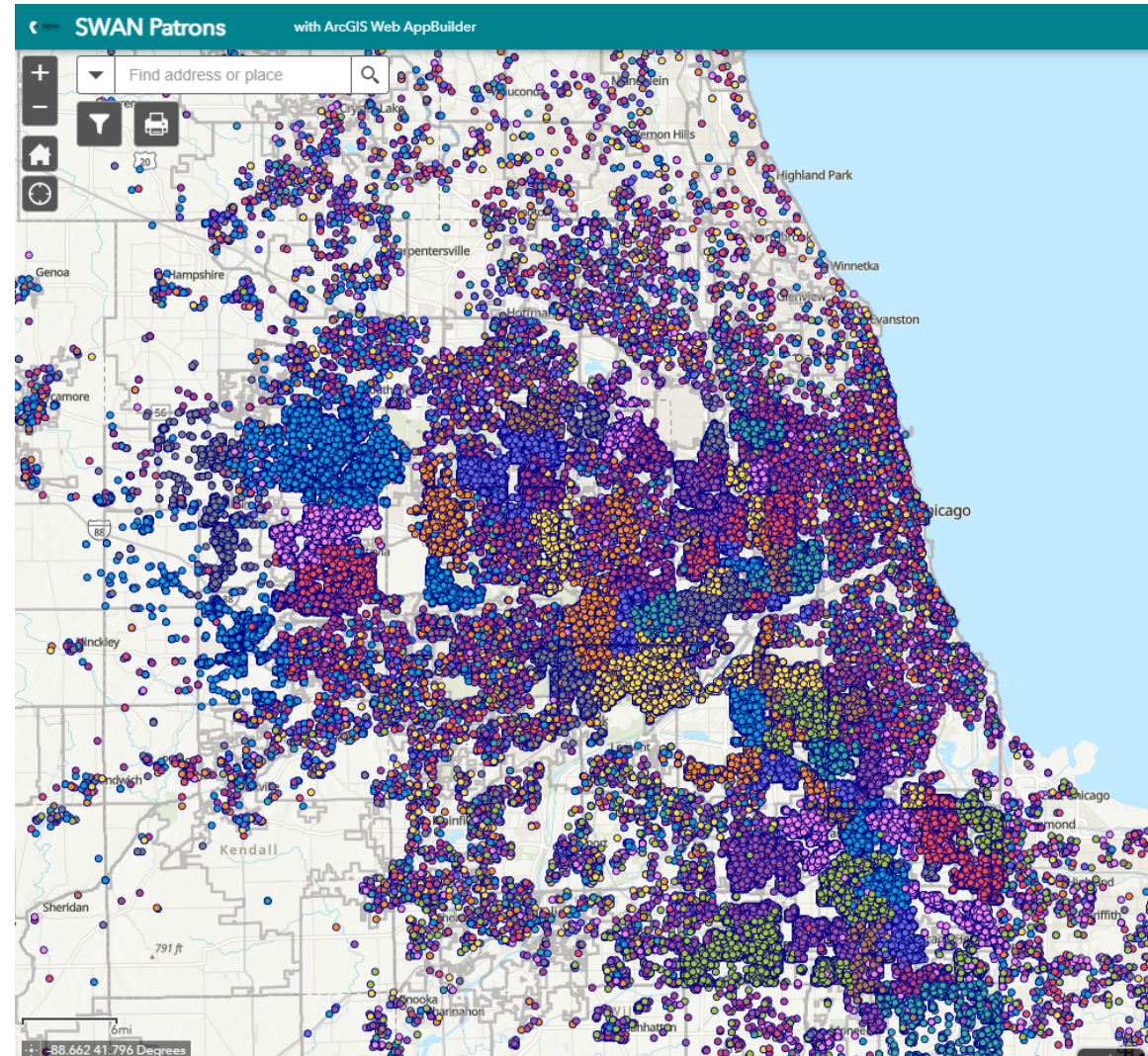
Datasets showing:

- Who – Who are our patrons?
- What – What do they check out?
- Where – Where do they check out from?

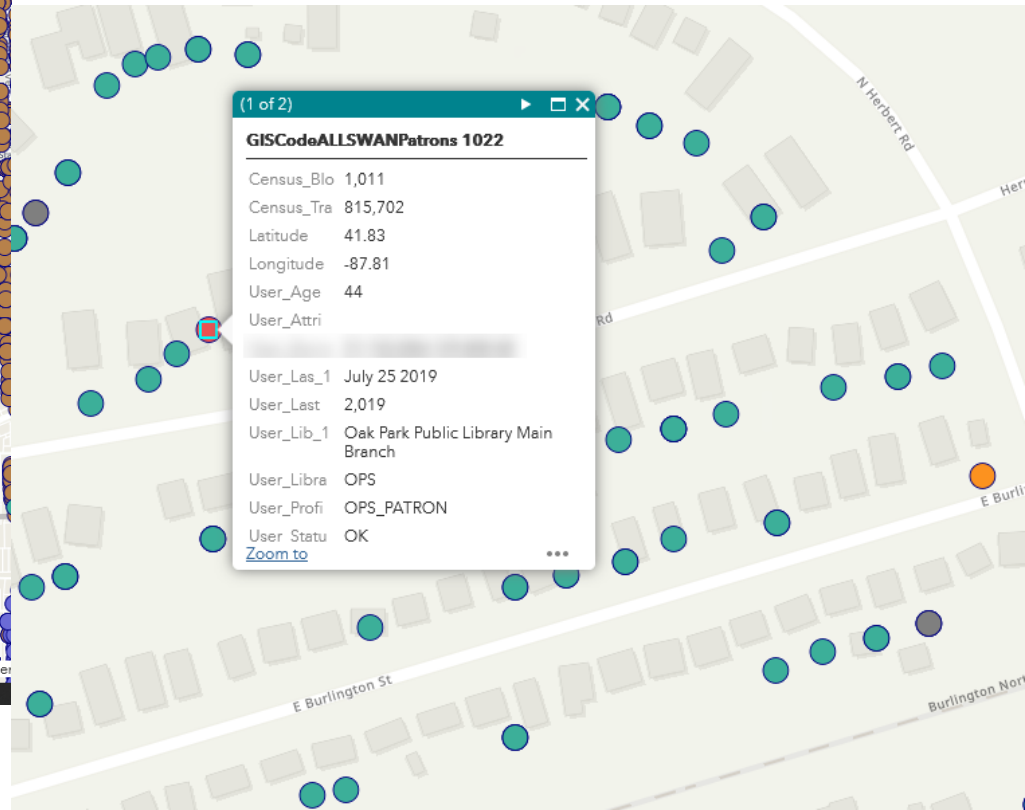
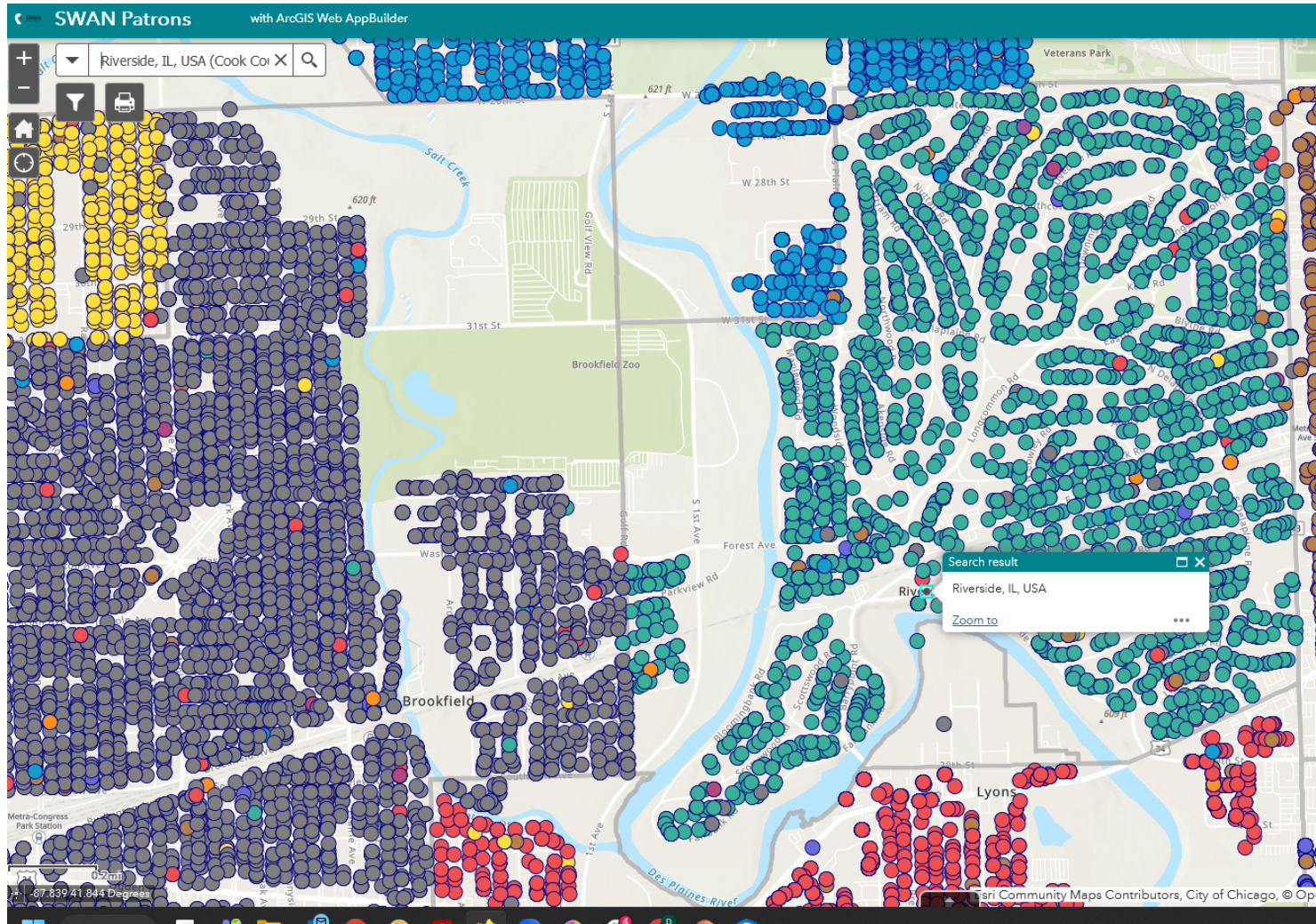


Who – All SWAN Patrons

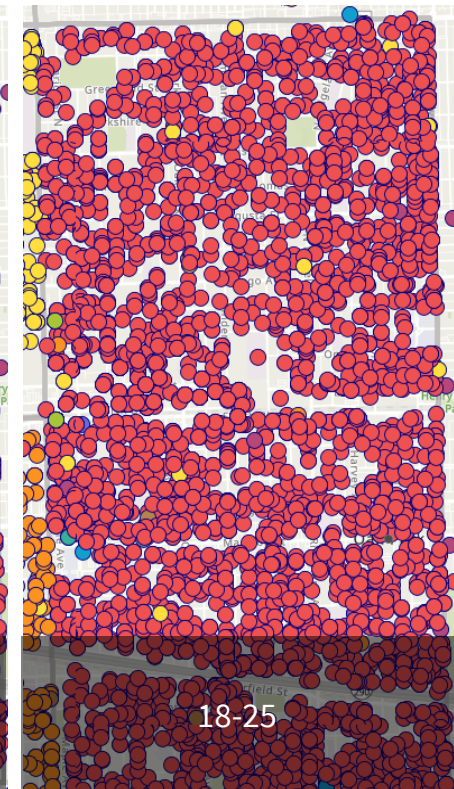
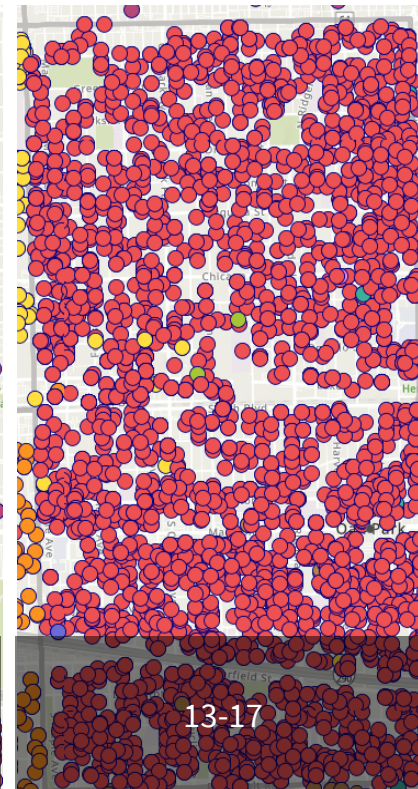
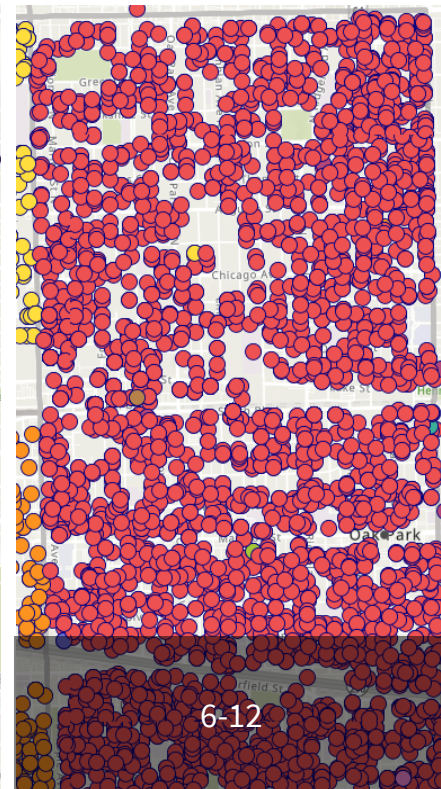
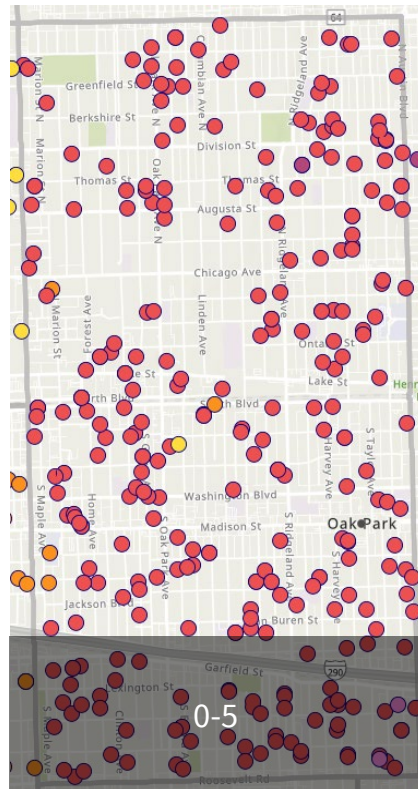
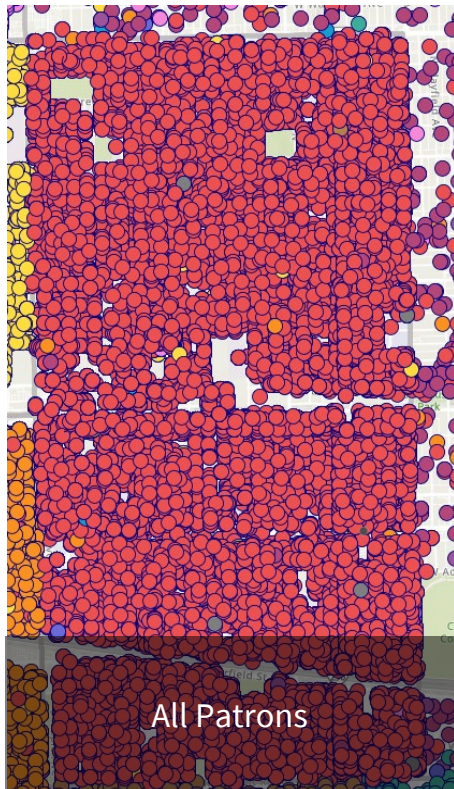
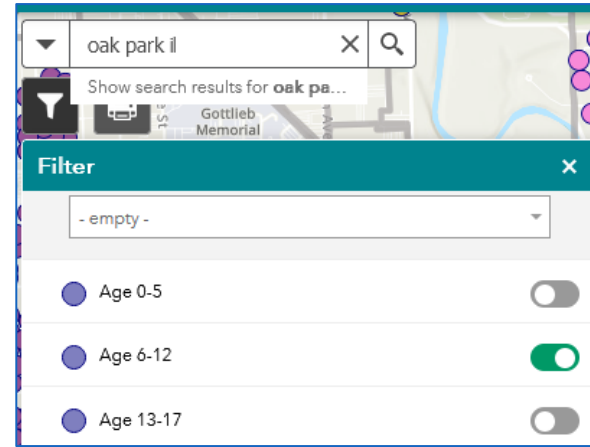
- Color code by Home Library
- Filter by:
 - Status
 - Profile
 - Last Activity Year
 - Last Activity Date
 - Age (Category)



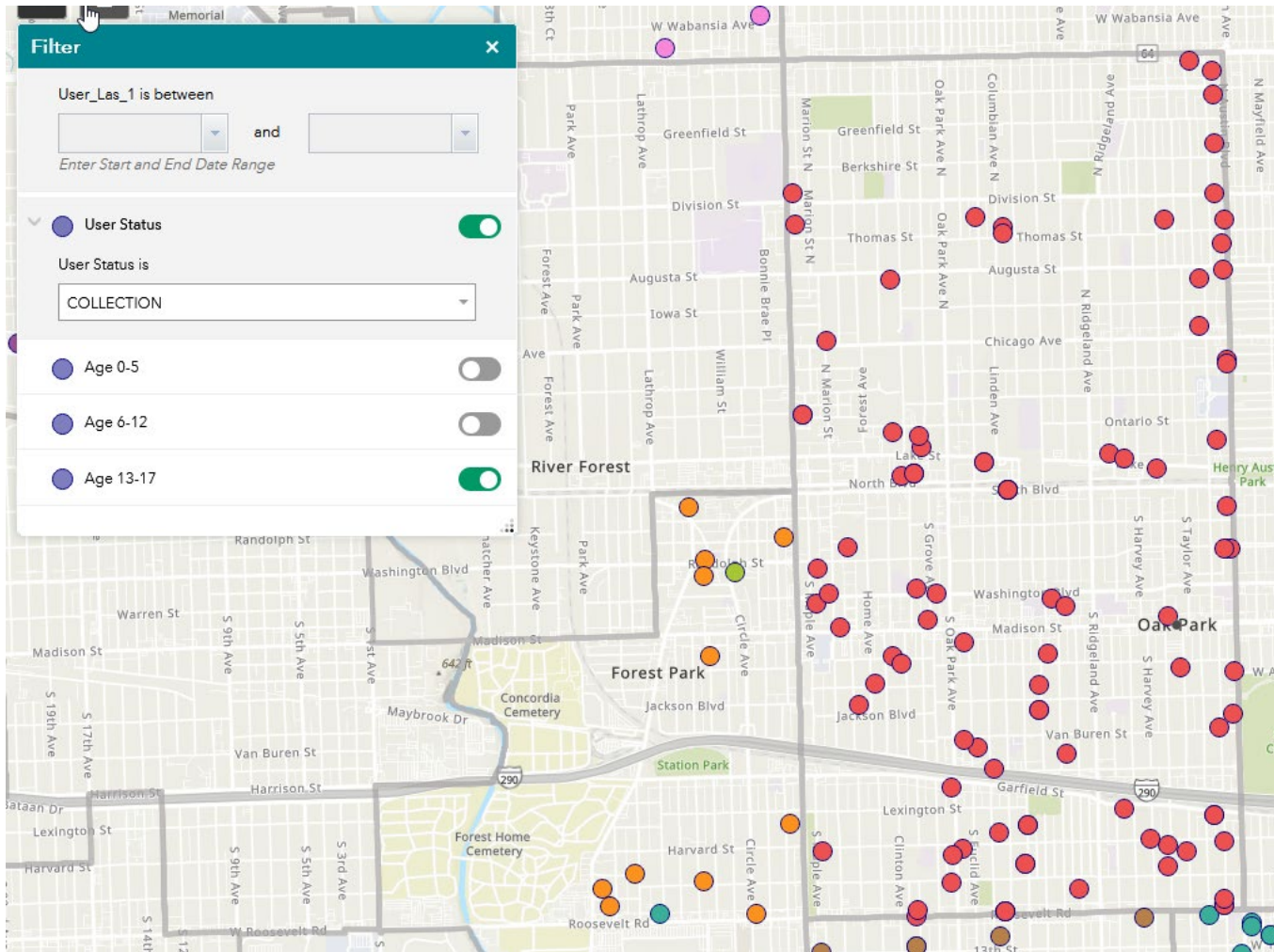
Search, Zoom in, Click on dot for details



Filter (e.g., age range)



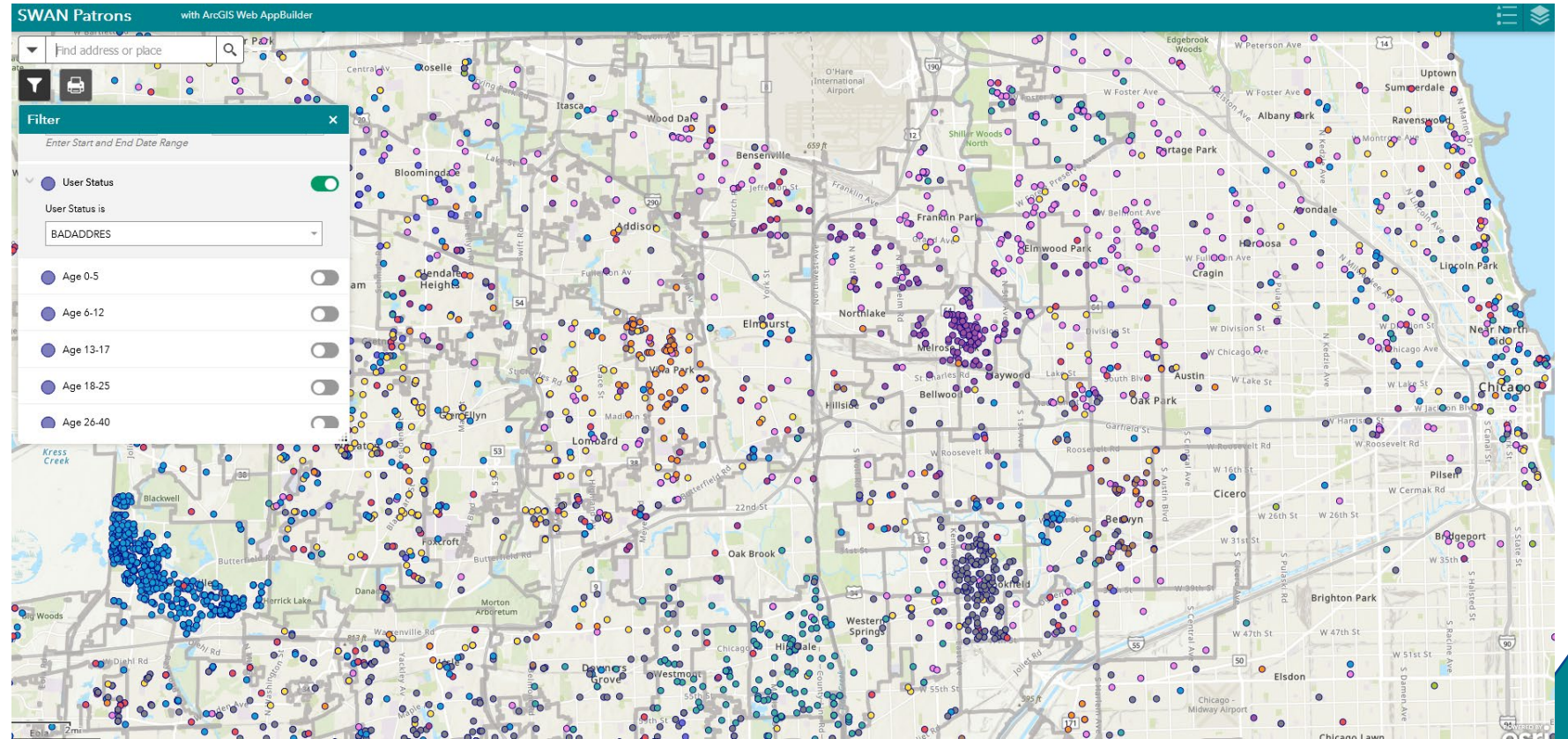
Helps visualize data anomalies



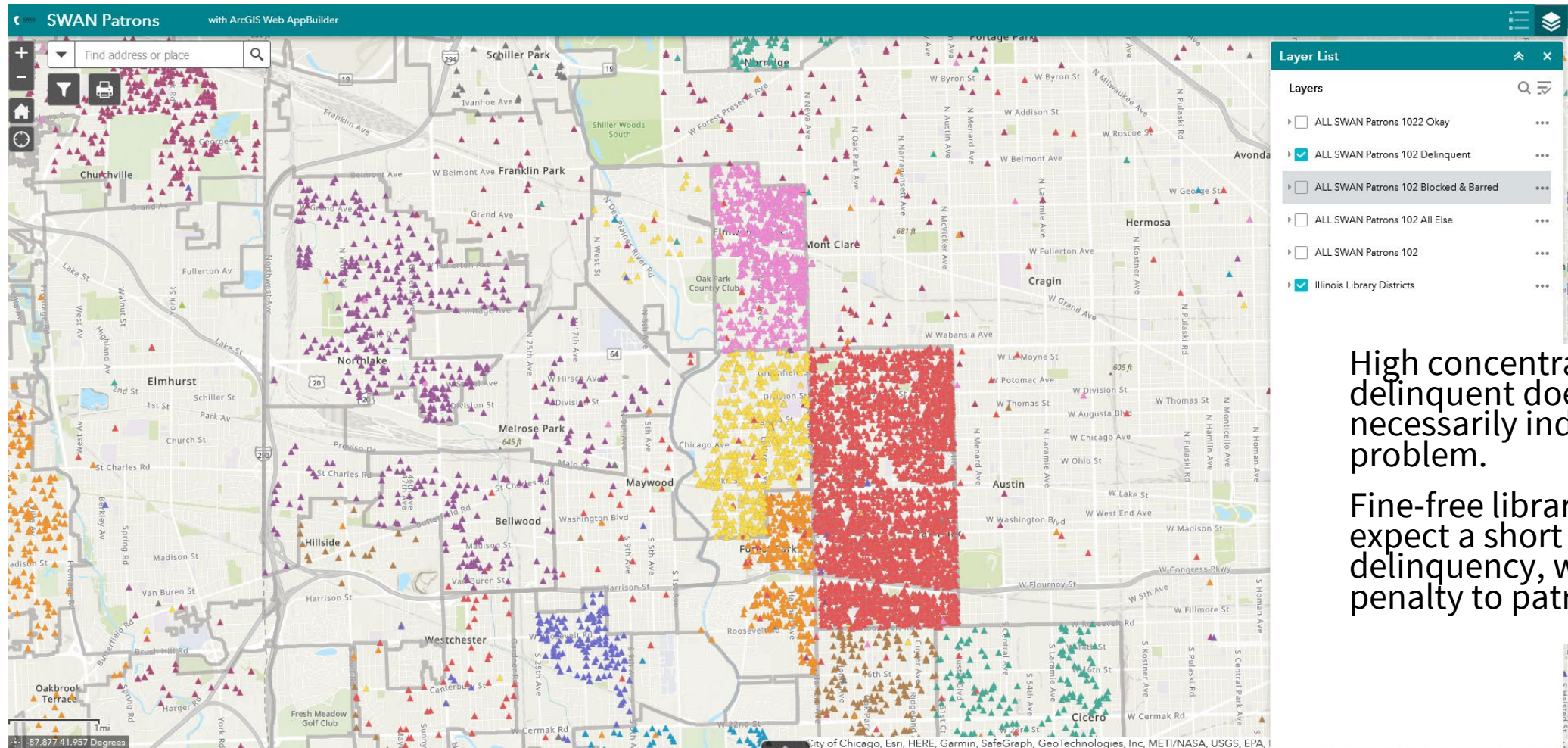
- 13-17 year olds in collection status
- Filters use Boolean AND to connect terms

User Status filter (e.g., BADADDRESS)

- Community clusters represent library local practice in updating status from NCOA



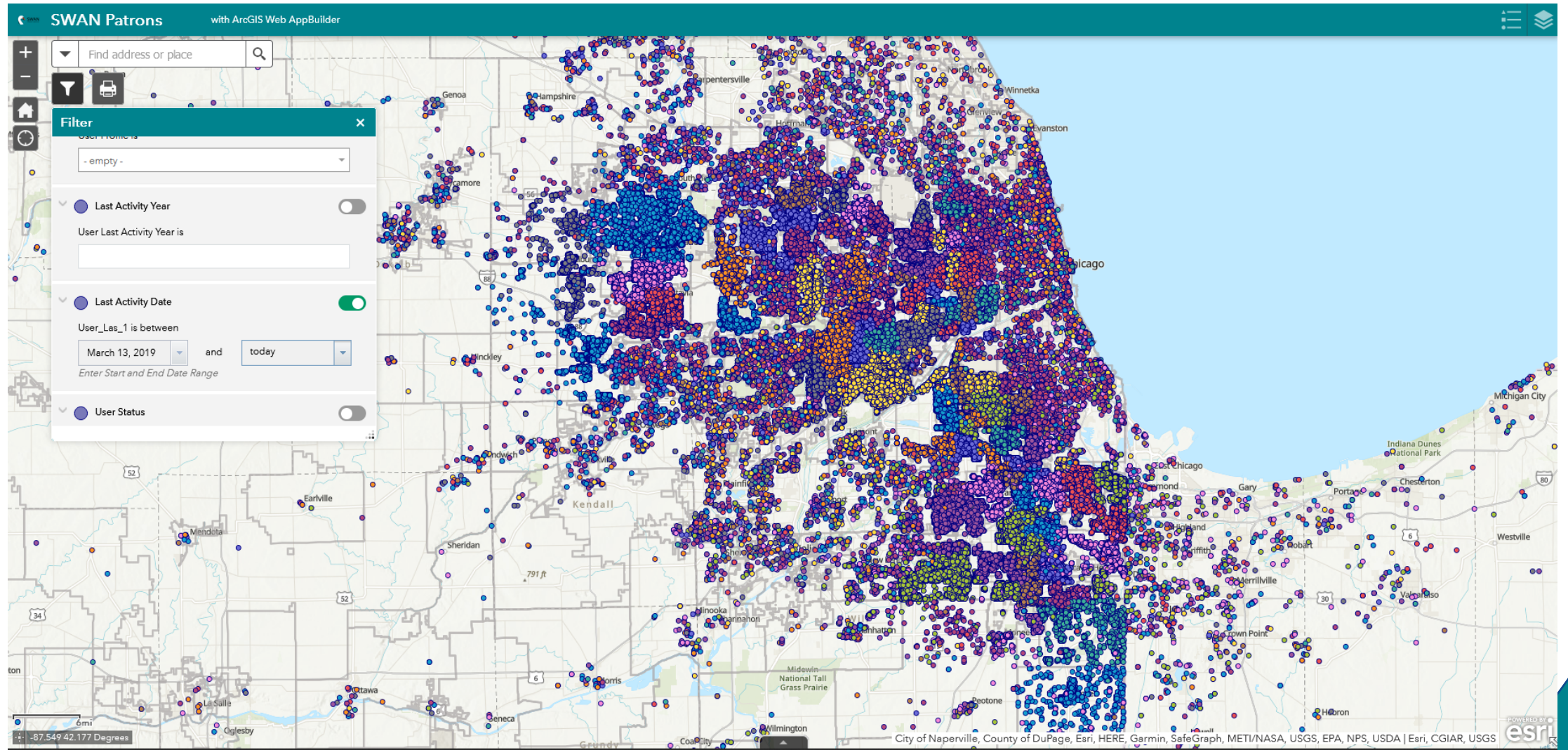
Change visible layer (e.g., Delinquent)



High concentration of delinquent doesn't necessarily indicate a problem.

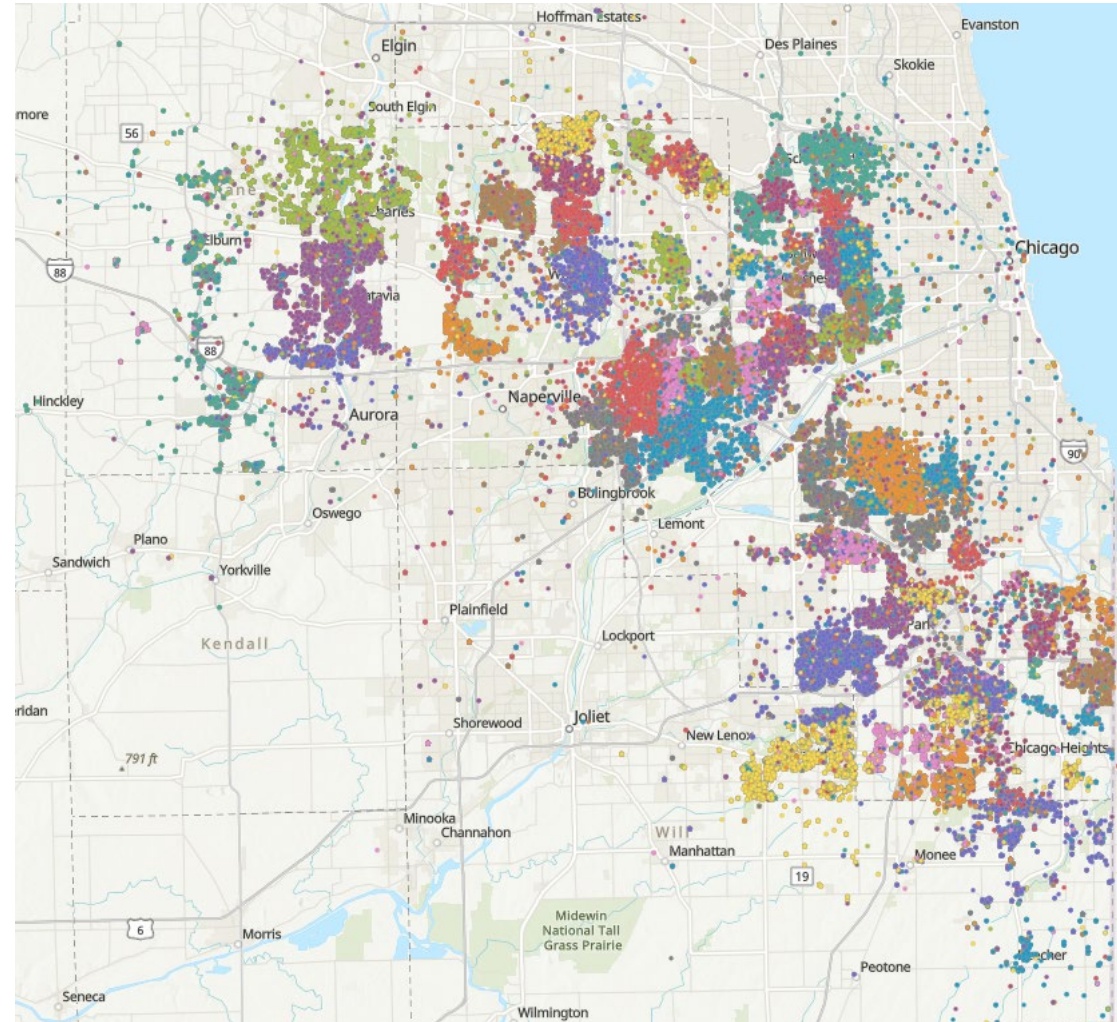
Fine-free libraries expect a short period of delinquency, without penalty to patron.

Last Activity Date > Start of Pandemic



What – Items circulated in last month

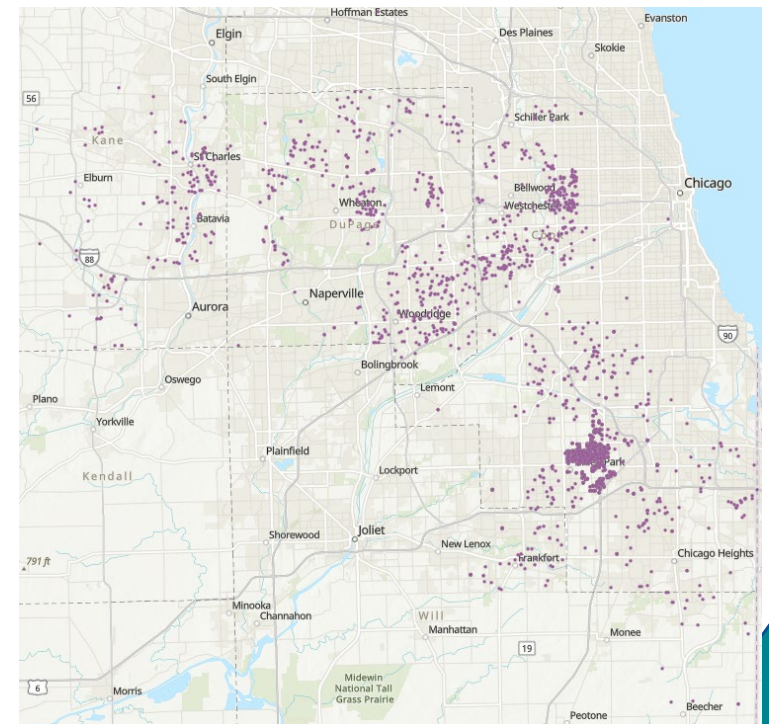
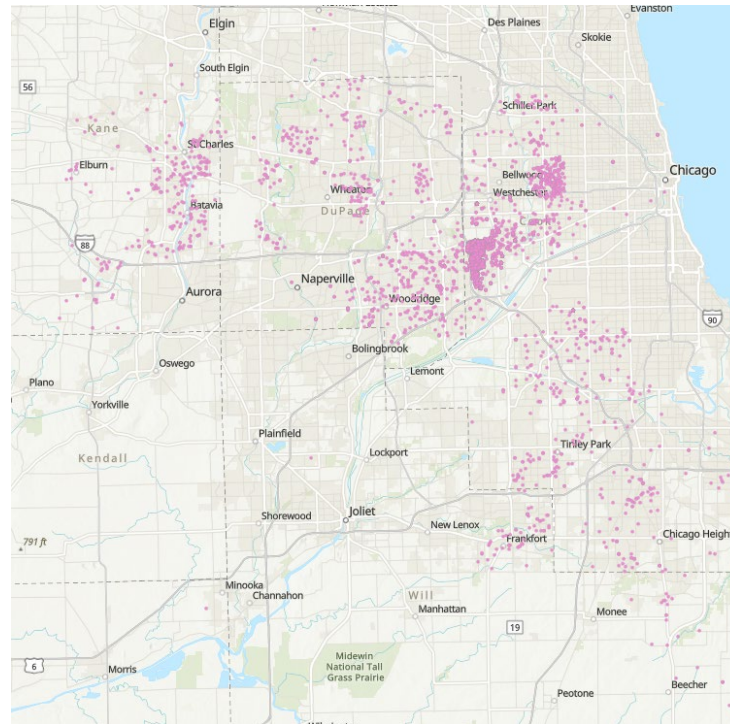
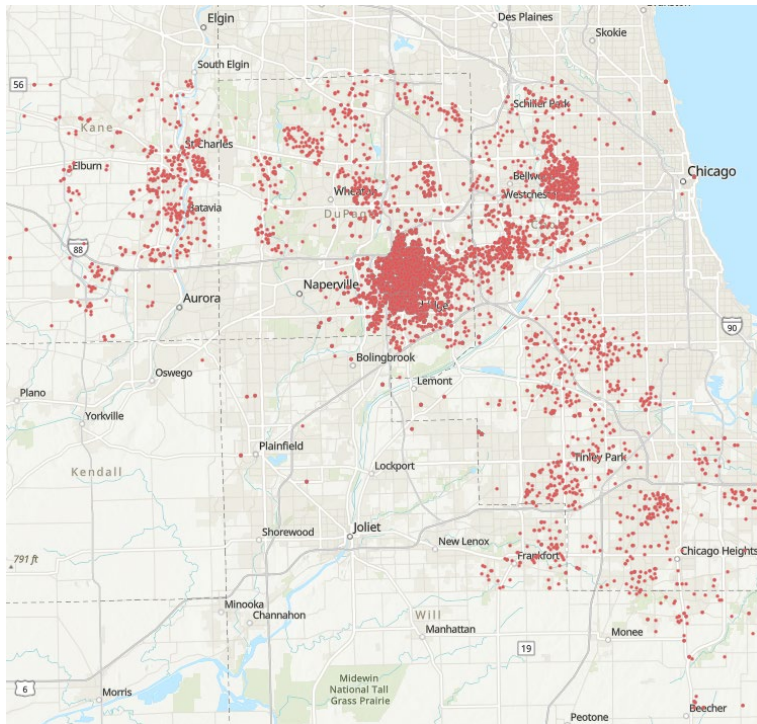
- Color code by Item Library
- Filter by:
 - Item Type
 - Item Category 1
 - User Library
 - Age (Category)



What items from my library circulated?

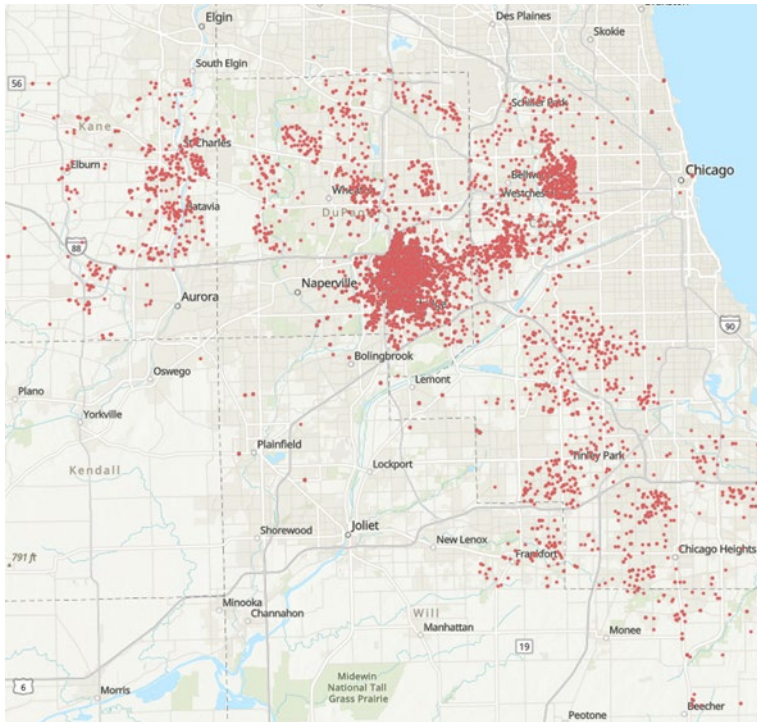
Every library shares resources throughout the SWAN region. Pattern is similar for all.

Cluster around my home library location, but items travel far and wide.

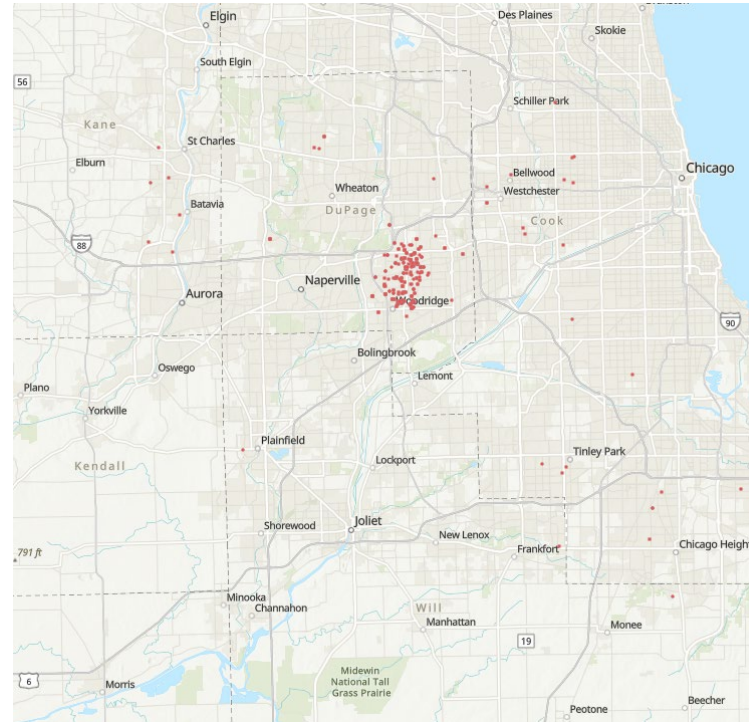


What about item type? (Item Cat 1)

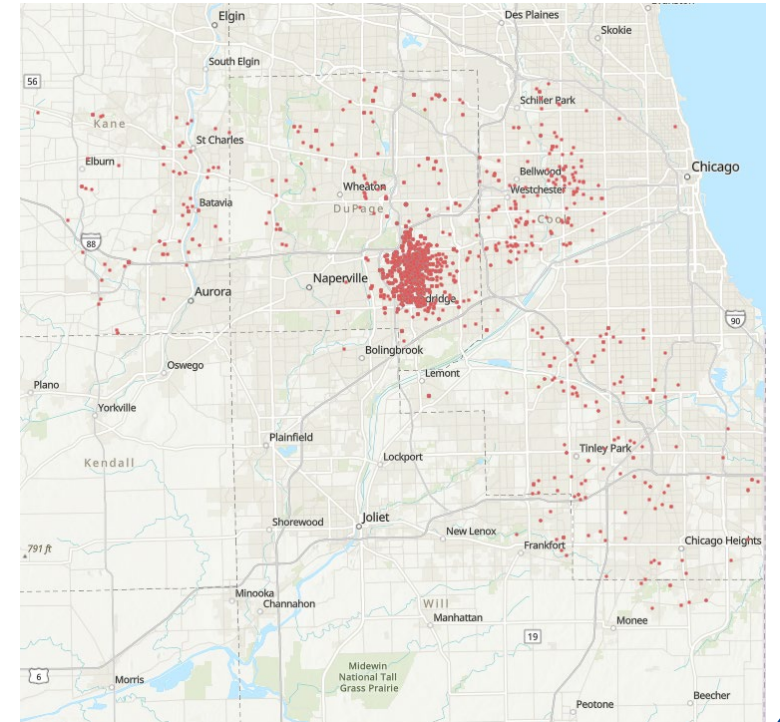
All



Console Games

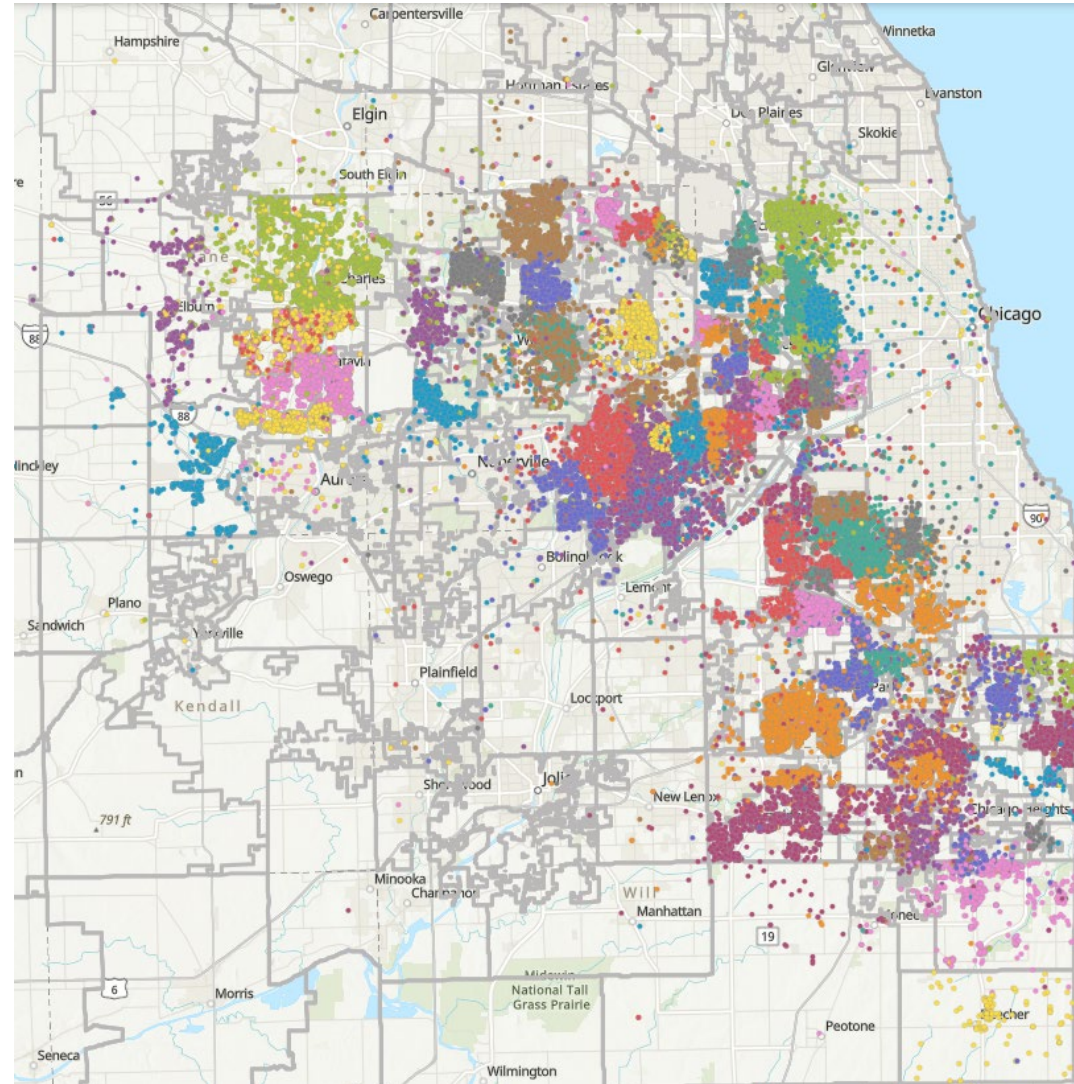


Video



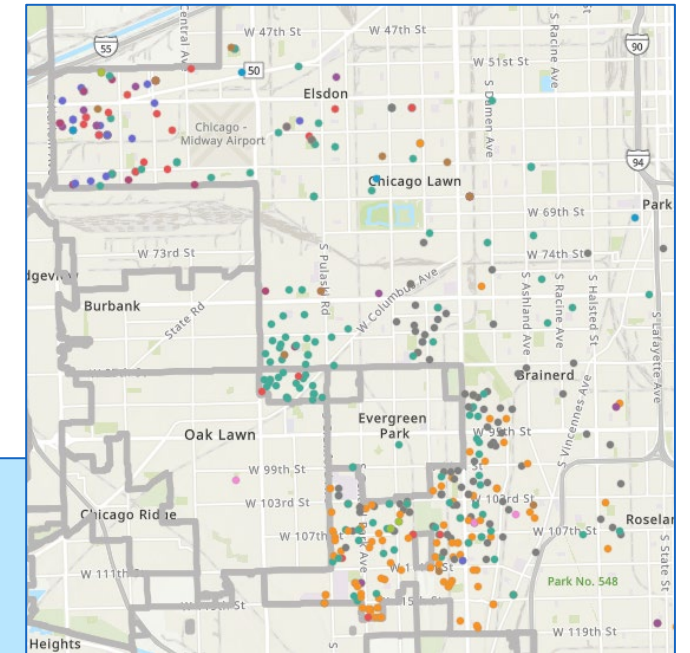
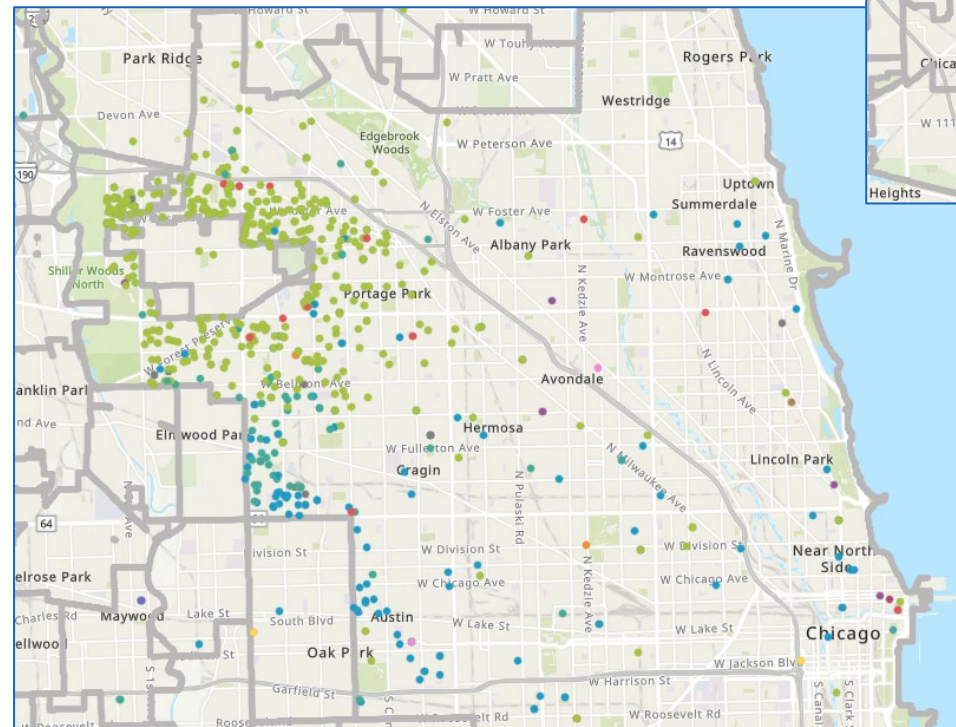
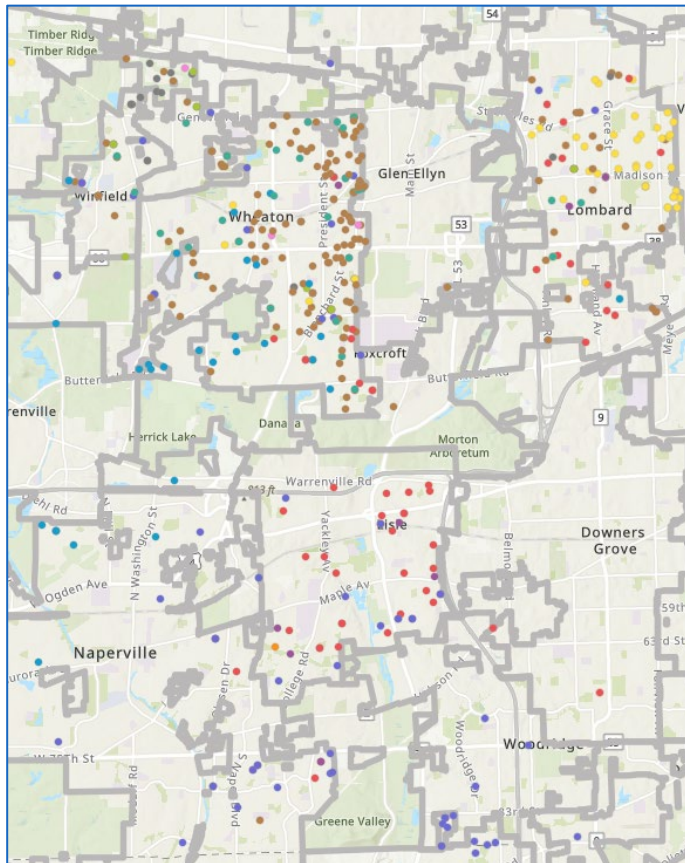
Where – Checkouts from which library

- Color code by Station Library
- Filter by:
 - User Library
 - User Attribute Category 8 (Non-SWAN home library)
 - Age (Category)
 - Checkout, renewals, total thresholds



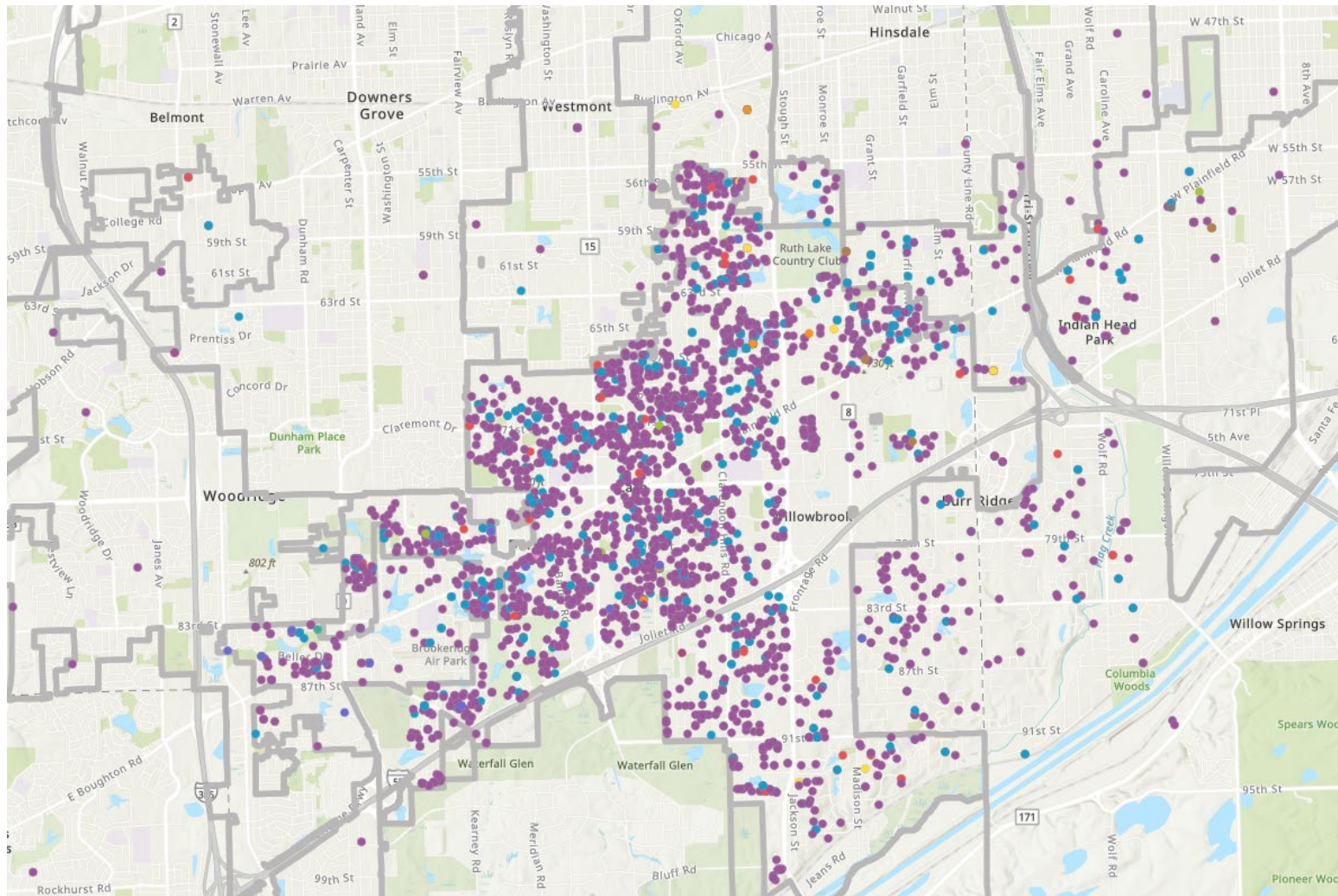
Where do Non-SWAN RBPs go?

- Where do we see clusters of checkouts?



Geography greatly impacts our libraries with respect to RBPs

Where do drive-up users live?



Checkout Library example:

- Purple – Main
- Blue – Drive-up
- Red – neighboring library
- Some patrons or households, use multiple

(2 of 2)

GIS Coded Patron Checkouts 1022

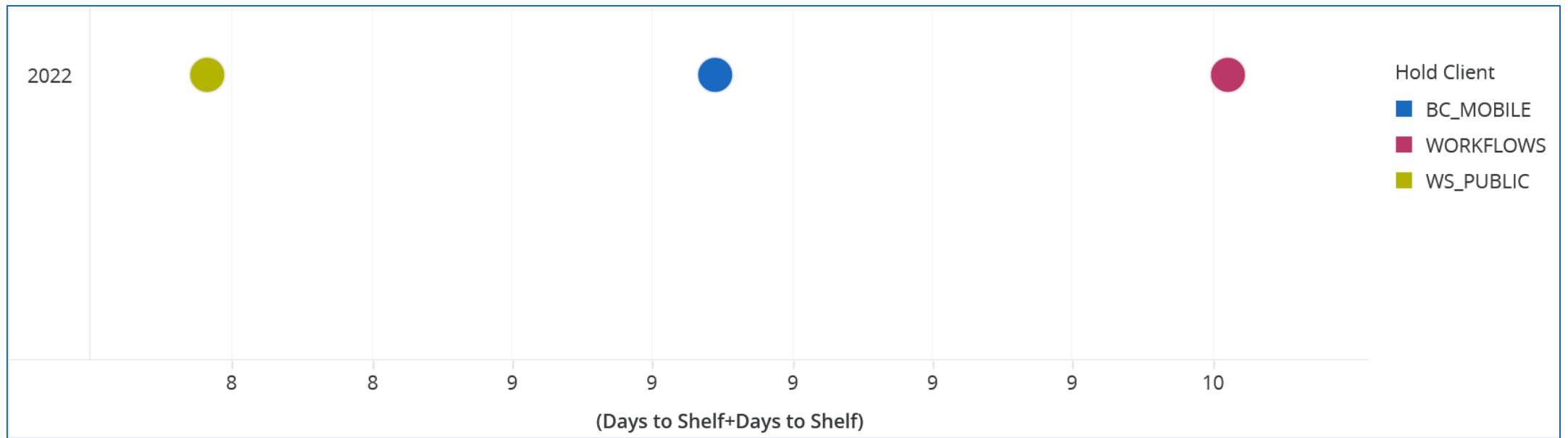
CensusBloc	1,005.00
CensusTrac	845,505.00
ChargeItem	6
Latitude	41.76
Longitude	-87.99
RenewItem	
Total	6
TransStatS	DGS
UserAge	31

Holdings & Aspen: time to fill & impact of Aspen Discovery

Tara Wood, SWAN

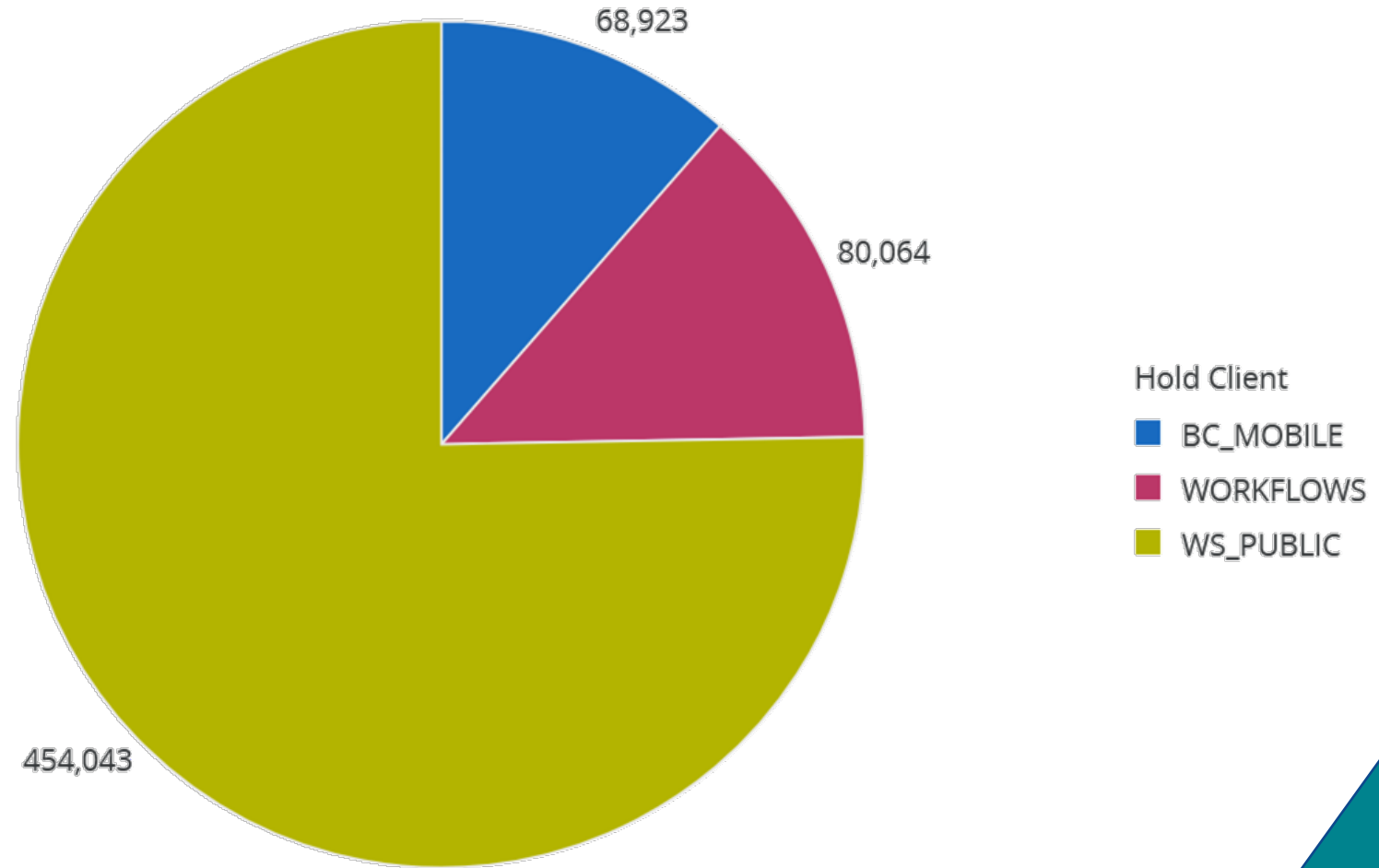
Hold Total Days to Shelf

- May 1 – October 31, 2022
- Holds placed through Aspen average less time to fill (8 days) than BLUEcloud Mobile (9 days) or Workflows (10 days)



Hold Volume by Client

- May 1 – October 31, 2022
- Hold volume is much higher in Aspen (75%) than in BLUEcloud Mobile or WorkFlows (25%), so overall time to fill is lower.



Give or take a day or two – no big deal, right?

- 1 day wait time saved on 450,000 holds placed in Aspen
- $450,000/365 = 1,233$ Years of time saved.
- For ~34,000 patrons placing holds, that represents almost a 2-week time savings per patron in a 6-month period!

Like pennies in the bank, it adds up!



Announcements & Questions