

# SWAN BOARD MEETING AGENDA

March 22, 2024 9:30 a.m.

**Bloomington Public Library  
101 Fairfield Way  
Bloomington, IL 60108-1537**

1. Call to Order, Roll Call
2. Introduction of Visitors/Public Comment

Public comment is allowed at SWAN meetings

3. Action Item – Acceptance of the March 22, 2024 SWAN Board Meeting Agenda

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE MARCH 22, 2024 SWAN BOARD MEETING AGENDA AS PRESENTED

4. Action Item – Approval of SWAN Financials, February 2024 (Exhibit pgs. 3-12)
  - a. Balance sheet and detail of expenditures for February 2024
  - b. Approval of the payment of bills for February 1, 2024, through February 29, 2024 in the amount of \$53,540.47

RESOLVED, THAT THE SWAN BOARD APPROVES THE PAYMENT OF BILLS FOR FEBRUARY 1 THROUGH FEBRUARY 29, 2024 AND ACCEPTS THE BALANCE SHEET AND DETAIL OF EXPENDITURES FOR FEBRUARY 2024

5. Action Item – Acceptance of the February 16, 2024, SWAN Board Meeting Minutes (Exhibit pgs. 13-15)

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE FEBRUARY 16, 2024 SWAN BOARD MEETING MINUTES AS PRESENTED

6. Reports
  - a. Board President Report
  - b. Executive Director Report (Exhibit pgs. 16-20)
  - c. Operations Report (Exhibit pgs. 21-36)
  - d. Treasurer Report
  - e. Board Calendar (Exhibit pgs. 37-38)

7. Discussion-- Member satisfaction with SWAN platform survey results (Exhibit pgs. 39-48)

8. Adjournment

\*All agenda items may be acted upon by the SWAN Board

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<b>SWAN Board Member</b>	<b>Library</b>	<b>Office</b>	<b>Term Expires</b>
Dorothy Koll	Acorn Public Library District	Vice-president	July 1, 2024
Tim Jarzemsky	Bloomindale Public Library	Treasurer	July 1, 2024
Anna Wassenaar	Blue Island Public Library		July 1, 2025
Colleen Waltman	Homewood Public Library		July 1, 2025
Jesse Blazek	Palos Heights Public Library	Secretary	July 1, 2025
Samantha Johnson	Roselle Public Library		July 1, 2026
Jennifer Cottrill	Midlothian Public Library	President	July 1, 2026

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SWAN Library Services  
Balance Sheet  
As of February 29, 2024

	Balance End of Month
<b>ASSETS</b>	
Cash and Cash Equivalents	
Hinsdale Bank - Operating - 2176	1,335,518.97
Hinsdale Bank - MM - 5010	1,512,089.51
Propay Funds	42.86
Total Cash and Cash Equivalents	\$ 2,847,651.34
 Current Assets	
Accounts Receivable	109,140.74
REINT Receivable	-
Other Receivables	-
Deposits	23,467.08
Prepaid Expenses	14,750.00
Total Current Assets	\$ 147,357.82
 Capital Assets, net	
Building and Improvements	6,895.00
Equipment	36,500.50
Computers	324,383.36
Accumulated Depreciation	(351,227.75)
Total Capital Assets, net	\$ 16,551.11
 Other Assets	
Intangible Right to Use Asset - Office Space	234,201.57
Accumulated Amortization - Right to Use Asset	(137,093.52)
Subscription Asset	1,933,499.27
Accumulated Amortization - Subscription Asset	(669,010.40)
Total Other Assets	\$ 1,361,596.92
 Total Assets	\$ 4,373,157.19
 <b>LIABILITIES</b>	
 Current Liabilities	
Library Consortia Special Interest Group Funds	5,786.46
Accrued Payroll	48,244.58
Compensated Absences	109,749.24
Total Current Liabilities	\$ 163,780.28
 Long Term Liabilities	
Lease Liability - Right to Use Asset	118,237.78
Subscription Liability	672,046.25
Accrued Interest Liability - SBITA	261.27
Total Long Term Liabilities	\$ 790,545.30
 Total Liabilities	\$ 954,325.58
 <b>FUND BALANCE</b>	
Beginning Net Assets	
Unrestricted	2,707,185.61
Total Beginning Net Assets	\$ 2,707,185.61
 Current YTD Net Income	\$ 711,646.00
 Total Fund Balance	\$ 3,418,831.61
 Total Liabilities and Fund Balances	\$ 4,373,157.19

**Statement of Revenue and Expenses Summary**  
**For the 8 Months Ended February 29, 2024**

	<u>Month-to-Date Actual</u>	<u>Year-to-Date Actual</u>	<u>Annual Budget</u>	<u>Remaining Budget</u>	<u>% Collected Expended</u>
<b>Revenue</b>					
4000 - Membership Fees	\$5,525.16	\$2,305,756.03	\$3,071,672.00	\$ 765,915.97	75.07%
4100 - Membership Reimbursements	449.50	466,180.83	443,223.00	(22,957.83)	105.18%
4200 - Reimbursement for Losses	4,851.11	58,720.80	108,680.00	49,959.20	54.03%
4300 - Grant Revenue	16,504.00	390,782.50	515,012.00	124,229.50	75.88%
4400 - Registration & Event Receipts	-	6,260.00	3,400.00	(2,860.00)	184.12%
4500 - Investment & Interest	6,460.30	53,674.23	20,800.00	(32,874.23)	258.05%
4600 - Reserve Fund Transfer	-	17,592.00	73,800.00	56,208.00	23.84%
<b>Total Revenue</b>	<u>33,790.07</u>	<u>3,298,966.39</u>	<u>4,236,587.00</u>	<u>937,620.61</u>	<u>77.87%</u>
<b>Expenses</b>					
5000 - Salaries & Wages	170,530.17	996,518.48	1,546,800.00	550,281.52	64.42%
5020 - Personnel Benefits	36,407.35	287,888.15	457,700.00	169,811.85	62.90%
5100 - Building & Grounds	10,966.56	97,386.97	129,510.00	32,123.03	75.20%
5200 - Professional Development	-	4,627.67	16,700.00	12,072.33	27.71%
5300 - Membership Development	(127.79)	4,746.87	7,370.00	2,623.13	64.41%
5400 - Information & Technology Services	9,206.45	568,724.20	1,244,090.00	675,365.80	45.71%
5500 - General Office	343.23	3,775.22	2,700.00	(1,075.22)	139.82%
5600 - Hardware & Equipment	99.80	955.70	6,300.00	5,344.30	15.17%
5700 - Insurance	-	11,218.00	11,500.00	282.00	97.55%
5800 - Contractual Services	9,242.78	94,914.87	216,984.00	122,069.13	43.74%
5900 - Library Materials & Content	4,720.17	513,901.86	565,251.00	51,349.14	90.92%
6000 - Interest & Fees	222.90	2,662.40	4,050.00	1,387.60	65.74%
<b>Total Expenses</b>	<u>241,611.62</u>	<u>2,587,320.39</u>	<u>4,211,277.00</u>	<u>1,623,956.61</u>	<u>61.44%</u>
<b>Excess Revenues less Expenses</b>	<u>\$ (207,821.55)</u>	<u>\$ 711,646.00</u>	<u>\$ 25,310.00</u>	<u>\$ (686,336.00)</u>	

# Statement of Revenue and Expenses

## For the 8 Months Ended February 29, 2024

	Month-to-Date Actual	Year-to-Date Actual	Annual Budget	Remaining Budget	% Collected Expended
<b>Revenue</b>					
4010 - SWAN Full Membership Fees	\$ 1,886.16	\$ 2,302,117.03	\$ 3,067,972.00	\$ 765,854.97	75.04%
4011 - SWAN Internet Access Membership Fees	3,639.00	3,639.00	3,700.00	61.00	98.35%
4190 - Member Group Purchase Receipts	449.50	466,180.83	443,223.00	(22,957.83)	105.18%
4220 - Reimbursement Losses for Resource Sharing	(30.00)	28,652.99	63,000.00	34,347.01	45.48%
4240 - E-Commerce Transactions	4,881.11	30,067.81	45,680.00	15,612.19	65.82%
4310 - RAILS Support to SWAN	0.00	374,278.50	498,388.00	124,109.50	75.10%
4320 - Other Grant Revenue	16,504.00	16,504.00	16,624.00	120.00	99.28%
4499 - Annual Conference Receipts	0.00	6,260.00	3,400.00	(2,860.00)	184.12%
4510 - Interest Income	6,460.30	53,674.23	20,800.00	(32,874.23)	258.05%
4600 - Reserve Fund Transfer	0.00	17,592.00	73,800.00	56,208.00	23.84%
<b>Total Revenue</b>	<b>33,790.07</b>	<b>3,298,966.39</b>	<b>4,236,587.00</b>	<b>937,620.61</b>	<b>77.87%</b>
<b>Expenses</b>					
5000 - Salaries & Wages	170,530.17	996,518.48	1,546,800.00	550,281.52	64.42%
5021 - FICA Expense	12,561.50	73,706.24	118,400.00	44,693.76	62.25%
5023 - Worker's Compensation	0.00	4,908.00	4,500.00	(408.00)	109.07%
5024 - Retirement Benefits	10,689.68	94,278.48	140,900.00	46,621.52	66.91%
5025 - Health, Dental, Life And Disability Insurance	13,121.17	114,900.49	192,400.00	77,499.51	59.72%
5026 - Tuition Reimbursements	0.00	0.00	1,100.00	1,100.00	0.00%
5085 - Staff Wellness	35.00	94.94	400.00	305.06	23.74%
5110 - Rent/Lease	10,187.75	89,866.28	117,300.00	27,433.72	76.61%
5120 - Utilities	278.81	4,145.67	6,700.00	2,554.33	61.88%
5130 - Property Insurance	0.00	642.00	650.00	8.00	98.77%
5140 - Repairs & Maintenance	240.00	688.90	860.00	171.10	80.10%
5150 - Custodial Service & Supplies	260.00	2,044.12	4,000.00	1,955.88	51.10%
5210 - Conference Travel	0.00	2,012.71	6,000.00	3,987.29	33.55%
5220 - Staff Meetings	0.00	0.00	900.00	900.00	0.00%
5230 - Staff Professional Development	0.00	1,535.76	4,000.00	2,464.24	38.39%
5240 - Professional Association Membership Dues	0.00	937.00	2,500.00	1,563.00	37.48%
5250 - Educational Material	0.00	0.00	800.00	800.00	0.00%
5260 - Online Learning	0.00	142.20	2,500.00	2,357.80	5.69%
5310 - Travel Reimbursement	314.96	529.12	800.00	270.88	66.14%
5320 - Membership Meetings	0.00	76.00	0.00	(76.00)	0.00%
5330 - Library Professional Development	(442.75)	4,141.75	6,570.00	2,428.25	63.04%
5410 - Infrastructure Licensing	0.00	234.96	0.00	(234.96)	0.00%
5420 - Application Software Licensing	219.40	15,212.82	18,000.00	2,787.18	84.52%
5430 - Server Software Licensing	7,338.37	74,826.54	79,890.00	5,063.46	93.66%
5440 - Library Services Platform	0.00	408,607.69	1,016,300.00	607,692.31	40.21%
5450 - Data Management Services	257.46	26,892.81	33,000.00	6,107.19	81.49%
5460 - Information Subscription Service	0.00	19,931.45	75,000.00	55,068.55	26.58%
5470 - Subscription Support Services	289.00	4,238.19	6,800.00	2,561.81	62.33%
5480 - Telecommunications	1,102.22	8,782.24	14,500.00	5,717.76	60.57%
5490 - Group Purchases - Services	0.00	9,997.50	600.00	(9,397.50)	1666.25%
5510 - Office Supplies	261.73	3,063.10	2,200.00	(863.10)	139.23%
5520 - Postage	81.50	518.14	500.00	(18.14)	103.63%
5599 - Annual Conference Supplies	0.00	193.98	0.00	(193.98)	0.00%
5610 - Equipment Rental/Maintenance	99.80	955.70	1,000.00	44.30	95.57%
5620 - Hardware	0.00	0.00	4,200.00	4,200.00	0.00%
5690 - Group Purchases - Hardware	0.00	0.00	1,100.00	1,100.00	0.00%
5700 - Insurance	0.00	11,218.00	11,500.00	282.00	97.55%
5810 - Legal	215.00	215.00	1,500.00	1,285.00	14.33%
5820 - Accounting	1,055.00	7,385.00	19,160.00	11,775.00	38.54%

**Statement of Revenue and Expenses**  
**For the 8 Months Ended February 29, 2024**

	<u>Month-to-Date Actual</u>	<u>Year-to-Date Actual</u>	<u>Annual Budget</u>	<u>Remaining Budget</u>	<u>% Collected Expended</u>
5830 - Consulting	0.00	3,175.00	75,000.00	71,825.00	4.23%
5840 - Payroll Service Fees	715.33	3,178.65	3,600.00	421.35	88.30%
5850 - Contractual Agreements	0.00	21,624.00	16,624.00	(5,000.00)	130.08%
5860 - Notification & Collection	7,257.45	50,481.22	92,200.00	41,718.78	54.75%
5899 - Annual Conference Facility Contract	0.00	8,856.00	8,900.00	44.00	99.51%
5910 - Print Materials	0.00	0.00	5,300.00	5,300.00	0.00%
5920 - Reimburse for Resource Sharing	0.00	28,507.22	63,000.00	34,492.78	45.25%
5940 - E-Commerce Payment Transactions	4,720.17	30,105.26	45,680.00	15,574.74	65.90%
5990 - Group Purchases - Content	0.00	455,289.38	451,271.00	(4,018.38)	100.89%
6010 - Bank Fees	222.90	1,831.00	3,700.00	1,869.00	49.49%
6020 - Merchant Account Fees	0.00	831.40	50.00	(781.40)	1662.80%
6099 - Annual Conference Merchant Fees	0.00	0.00	300.00	300.00	0.00%
6110 - Depreciation	0.00	0.00	2,322.00	2,322.00	0.00%
<b>Total Expenses</b>	<u>241,611.62</u>	<u>2,587,320.39</u>	<u>4,211,277.00</u>	<u>1,623,956.61</u>	<u>61.44%</u>
 <b>Excess Revenues less Expenses</b>	 <u>\$ (207,821.55)</u>	 <u>\$ 711,646.00</u>	 <u>\$ 25,310.00</u>	 <u>\$ (686,336.00)</u>	

# SWAN Library Services

## Check Register

All Bank Accounts

February 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
<b>Vendor Checks</b>						
ICS Learning Group				10351	02/22/24	<u>(442.75)</u>
5330	Library Professional Development	To VOID check 10351	-442.75			
Acorn Public Library				10361	02/08/24	<u>31.39</u>
5940	E-Commerce Payment Transactions	Acorn Public Library	31.39			
Addison Public Library				10362	02/08/24	<u>7.51</u>
5940	E-Commerce Payment Transactions	Addison Public Library	7.51			
Batavia Public Library				10363	02/08/24	<u>515.97</u>
5940	E-Commerce Payment Transactions	Batavia Public Library	515.97			
Bellwood Public Library				10364	02/08/24	<u>24.73</u>
5940	E-Commerce Payment Transactions	Bellwood Public Library	24.73			
Bensenville Community Public Library District				10365	02/08/24	<u>9.41</u>
5940	E-Commerce Payment Transactions	Bensenville Community Public Library District	9.41			
Berwyn Public Library				10366	02/08/24	<u>102.62</u>
5940	E-Commerce Payment Transactions	\	102.62			
Bloomington Public Library				10367	02/08/24	<u>101.47</u>
5940	E-Commerce Payment Transactions	Bloomington Public Library	101.47			
Blue Island Public Library				10368	02/08/24	<u>11.31</u>
5940	E-Commerce Payment Transactions	Blue Island Public Library	11.31			
Chicago Heights Public Library				10369	02/08/24	<u>32.42</u>
5940	E-Commerce Payment Transactions	Chicago Heights Public Library	32.42			
Clarendon Hills Public Library				10370	02/08/24	<u>20.07</u>
5940	E-Commerce Payment Transactions	Clarendon Hills Public Library	20.07			
Crestwood Public Library District				10371	02/08/24	<u>36.02</u>
5940	E-Commerce Payment Transactions	Crestwood Public Library District	36.02			

# SWAN Library Services

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All Bank Accounts

February 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Elmwood Park Public Library 5940	E-Commerce Payment Transactions	Elmwood Park Public Library	43.58	10372	02/08/24	<u>43.58</u>
Linda Sokol Francis Brookfield Library 5940	E-Commerce Payment Transactions	Linda Sokol Francis Brookfield Library	16.73	10373	02/08/24	<u>16.73</u>
Carol Stream Public Library 5940	E-Commerce Payment Transactions	Carol Stream Public Library	113.16	10374	02/09/24	<u>113.16</u>
Crete Public Library District 5940	E-Commerce Payment Transactions	Crete Public Library District	30.58	10375	02/09/24	<u>30.58</u>
Flossmoor Public Library 5940	E-Commerce Payment Transactions	Flossmoor Public Library	57.66	10376	02/09/24	<u>57.66</u>
Forest Park Public Library 5940	E-Commerce Payment Transactions	Forest Park Public Library	125.73	10377	02/09/24	<u>125.73</u>
Franklin Park Public Library District 5940	E-Commerce Payment Transactions	Franklin Park Public Library District	50.99	10378	02/09/24	<u>50.99</u>
Geneva Public Library District 5940	E-Commerce Payment Transactions	Geneva Public Library District	182.69	10379	02/09/24	<u>182.69</u>
Glen Ellyn Public Library 5940	E-Commerce Payment Transactions	Glen Ellyn Public Library	68.70	10380	02/09/24	<u>68.70</u>
Glenside Public Library 5940	E-Commerce Payment Transactions	Glenside Public Library	49.52	10381	02/09/24	<u>49.52</u>
Grande Prairie Public Library 5940	E-Commerce Payment Transactions	Grande Prairie Public Library	40.50	10382	02/09/24	<u>40.50</u>
Green Hills Public Library District 5940	E-Commerce Payment Transactions	Green Hills Public Library District	16.06	10383	02/09/24	<u>16.06</u>



# SWAN Library Services

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All Bank Accounts

February 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Harvey Public Library District 5940	E-Commerce Payment Transactions	Harvey Public Library District	41.87	10384	02/09/24	<u>41.87</u>
Hinsdale Public Library 5940	E-Commerce Payment Transactions	Hinsdale Public Library	26.67	10385	02/09/24	<u>26.67</u>
Itasca Community Library 5940	E-Commerce Payment Transactions	Itasca Community Library	13.21	10386	02/09/24	<u>13.21</u>
Justice Public Library District 5940	E-Commerce Payment Transactions	Justice Public Library District	64.43	10387	02/09/24	<u>64.43</u>
Lansing Public Library 5940	E-Commerce Payment Transactions	Lansing Public Library	157.27	10388	02/09/24	<u>157.27</u>
Lyons Public Library 5940	E-Commerce Payment Transactions	Lyons Public Library	20.60	10389	02/09/24	<u>20.60</u>
Maywood Public Library District 5940	E-Commerce Payment Transactions	Maywood Public Library District	23.76	10390	02/09/24	<u>23.76</u>
Messenger Public Library of North Aurora 5940	E-Commerce Payment Transactions	Messenger Public Library of North Aurora	25.70	10391	02/09/24	<u>25.70</u>
Oak Lawn Public Library 5940	E-Commerce Payment Transactions	Oak Lawn Public Library	37.05	10392	02/09/24	<u>37.05</u>
Oak Park Public Library 5940	E-Commerce Payment Transactions	Oak Park Public Library	1,775.26	10393	02/09/24	<u>1,775.26</u>
Park Forest Public Library 5940	E-Commerce Payment Transactions	Park Forest Public Library	64.01	10394	02/09/24	<u>64.01</u>
River Forest Public Library 5940	E-Commerce Payment Transactions	River Forest Public Library	27.64	10395	02/09/24	<u>27.64</u>

## SWAN Library Services

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All Bank Accounts

February 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
St. Charles Public Library District 5940	E-Commerce Payment Transactions	St. Charles Public Library District	296.82	10396	02/09/24	<u>296.82</u>
Sugar Grove Public Library District 5940	E-Commerce Payment Transactions	Sugar Grove Public Library District	196.53	10397	02/09/24	<u>196.53</u>
University Park Public Library District 5940	E-Commerce Payment Transactions	University Park Public Library District	20.11	10398	02/09/24	<u>20.11</u>
Villa Park Public Library 5940	E-Commerce Payment Transactions	Villa Park Public Library	36.06	10399	02/09/24	<u>36.06</u>
Westchester Public Library 5940	E-Commerce Payment Transactions	Westchester Public Library	16.06	10400	02/09/24	<u>16.06</u>
Westmont Public Library 5940	E-Commerce Payment Transactions	Westmont Public Library	9.41	10401	02/09/24	<u>9.41</u>
Woodridge Public Library 5940	E-Commerce Payment Transactions	Woodridge Public Library	111.99	10402	02/09/24	<u>111.99</u>
Ahren Sievers 5510	Office Supplies	Ahren Sievers - SWAN holiday party decorations	38.66	10403	02/14/24	<u>38.66</u>
Comcast 5480	Telecommunications	Comcast - Feb 01, 2024 to Feb 29, 2024	764.95	10404	02/14/24	<u>764.95</u>
ICS Learning Group 5330	Library Professional Development	To VOID check 10405	-1,508.25	10405	02/22/24	<u>(1,508.25)</u>
ICS Learning Group 5330	Library Professional Development	ICS Learning Group - #04581	442.75	10405	02/14/24	<u>1,508.25</u>
5330	Library Professional Development	ICS Learning Group - #04969	442.75			
5330	Library Professional Development	ICS Learning Group - #05513	180.00			

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All Bank Accounts

February 2024

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5330	Library Professional Development	ICS Learning Group - #05495	442.75			
Klein, Thorpe and Jenkins, Ltd.				10406	02/14/24	<u>215.00</u>
5810	Legal	Klein, Thorpe and Jenkins, Ltd. Statement #238931	215.00			
Lauterbach & Amen, LLP				10407	02/14/24	<u>1,055.00</u>
5820	Accounting	Lauterbach & Amen, LLP - January	1,055.00			
LIMRiCC				10408	02/14/24	<u>18,751.13</u>
5025	Health, Dental, Life And Disability Insurance	LIMRiCC - February	18,751.13			
Marcive, Inc.				10409	02/14/24	<u>257.46</u>
5450	Data Management Services	Marcive, Inc. January	257.46			
Tara Wood				10410	02/14/24	<u>314.96</u>
5310	Travel Reimbursement	Tara Wood - Flight AspenCon	314.96			
Unique Integrated Communications, Inc.				10411	02/14/24	<u>7,257.45</u>
5860	Notification & Collection	Unique Integrated Communications, Inc. Inv. #6121868	40.00			
5860	Notification & Collection	Unique Integrated Communications, Inc. Inv. #6122886	6,715.50			
5860	Notification & Collection	Unique Integrated Communications, Inc. Inv. #6121898	501.95			
Wellness Insurance Network-WIN				10412	02/14/24	<u>167.68</u>
5025	Health, Dental, Life And Disability Insurance	Wellness Insurance Network-WIN - February	167.68			
Nicor Gas				10413	02/15/24	<u>278.81</u>
5120	Utilities	Nicor Gas - 01/12/24 - 02/14/24	278.81			
First Bankcard				51073	02/15/24	<u>8,828.41</u>
5140	Repairs & Maintenance	First Bankcard - nest labs	240.00			
5420	Application Software Licensing	First Bankcard - Techsmith (snagit)	165.40			
5420	Application Software Licensing	First Bankcard - mailchimp	54.00			

## SWAN Library Services

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All Bank Accounts

February 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
5430	Server Software Licensing	First Bankcard - DNS Made Easy	57.73			
5430	Server Software Licensing	First Bankcard - microsoft azure	5,437.96			
5430	Server Software Licensing	First Bankcard - red hat license	1,842.68			
5470	Subscription Support Services	First Bankcard - sendgrid	289.00			
5480	Telecommunications	First Bankcard - grasshopper	49.27			
5480	Telecommunications	First Bankcard - microsoft calling plan	288.00			
5510	Office Supplies	First Bankcard - Federal, State poster for QR	36.48			
5510	Office Supplies	First Bankcard - deluxe - envelopes office	186.59			
5520	Postage	First Bankcard - postage	81.50			
5610	Equipment Rental/Maintenance	First Bankcard - Genesis monthly	99.80			
Reliance Standard Life Insurance Co.				51074	02/23/24	<u>952.69</u>
5025	Health, Dental, Life And Disability Insurance	Reliance Standard Life Insurance Co. - Marcg	952.69			
T.A. Systems Inc.				51075	02/29/24	<u>260.00</u>
5150	Custodial Service & Supplies	T.A. Systems Inc. January	260.00			
Quail Ridge Drive Investors, LLC				51076	02/29/24	<u>10,187.75</u>
5110	Rent/Lease	Quail Ridge Drive Investors, LLC March	10,187.75			
					<b>Check List Total</b>	<u><u>53,540.47</u></u>

# SWAN BOARD MEETING MINUTES

**February 16, 2024, 9:30 a.m.**  
**Roselle Public Library District**  
**40 South Park Street**  
**Roselle, IL 60172**

## **1. Call to Order, Roll Call**

President Cottrill called the meeting to order at 9:31 a.m. The following Board members were present to establish a quorum.

- a. Jesse Blazek
- b. Jennifer Cottrill
- c. Tim Jarzemsky
- d. Sam Johnson
- e. Dorothy Koll
- f. Colleen Waltman
- g. Anna Wassenaar

## **2. Introduction of Visitors/Public Comment**

Aaron Skog, SWAN Executive Director  
Ginny Blake, SWAN Business Manager  
Scott Brandwein, SWAN Assistant Director

There was no public comment.

## **3. Action Item**

Acceptance of the February 16, 2024, SWAN Board Meeting Agenda

Koll moved, seconded by Johnson that it be

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE FEBRUARY 16, 2024, SWAN BOARD MEETING AGENDA AS PRESENTED

Motion carried by unanimous voice vote.

## **4. Action Item**

Acceptance of the SWAN Financials, January 2024

Jarzemsky moved, seconded by Waltman that it be

RESOLVED, THAT THE SWAN BOARD APPROVES THE PAYMENT OF BILLS FOR JANUARY 1, 2024, THROUGH JANUARY 31, 2024, AND ACCEPTS THE BALANCE SHEET AND DETAILS OF EXPENDITURES FOR JANUARY 2024 AS PRESENTED

Motion carried by roll call vote with the following results:

Ayes: Blazek, Cottrill, Jarzemsky, Johnson, Koll, Waltman, Wassenaar

**5. Action Item**

Acceptance of the January 19, 2024, SWAN Board Meeting Minutes

Blazek moved, seconded by Johnson that it be

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE JANUARY 2024, SWAN BOARD MEETING MINIUTES AS PRESENTED

Motion carried by unanimous voice vote.

**6. Reports**

**a. Board President Report**

None

**b. Executive Director Report**

Skog updated the board on SWAN activities.

**c. Operations Report**

Brandwein gave an overview of Operations as reported in the board packet.

**d. Treasurers Report**

None

**e. Board Calendar**

Reviewed

**7. Member satisfaction with SWAN platform survey results**

The board members reviewed and discussed the survey results.

**8. Discussion Item**

SWAN FY25 budget & membership fees draft

The FY25 budget was reviewed and discussed.

**9. Discussion Item**

Quarterly meeting agenda for March 7, 2024

The agenda for the Quarterly meeting was reviewed and discussed.

Cottrill adjourned the meeting at 10:36 a.m.

Minutes Prepared by Ginny Blake

Respectfully Submitted,

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Jesse Blazek  
Board Secretary

DRAFT

# SWAN Executive Director Report

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*March 22, 2024*

## Update on Activities

### **Facility search**

SWAN is currently leasing 5,621 square feet, which we would like to reduce to 2,300 square feet. Our lease ends October 31, 2024. We have signed an agreement with Lee & Associates to guide us through the search process and to find an office space that meets our goals. The market environment for a small office space for SWAN would seem to be favorable to our needs, but this is turning out to be not the case in some instances.

The reality is that the commercial real estate market is currently under tremendous pressure, and this has resulted in commercial brokers finding that building owners are seeking renters for much larger spaces, aka “bigger deals,” to resolve their financial problems.

SWAN experienced this issue almost immediately, when we approached our existing landlord. We toured two spaces owned by the company which were in the range for our space size, and we requested a proposal for one of the spaces. The company reviewed the build-out needs for SWAN (which were minimal) and after obtaining the construction costs needed for the space e.g. new carpet, updated lighting, etc., the company decided not to give SWAN a proposal. The reason, as explained by our agent, is that financial pressures for some commercial real estate companies are so great that spending money on the space we want and even with a much longer 10-year lease factored in, is not going to improve their financial picture. Our “deal” is too small to resolve the company’s financial issues. In other words, breaking up large spaces into smaller ones is costly. It is likely these companies will either negotiate their debt or get rid of some properties in their portfolio that are no longer viable.

Based on this new information, I asked our agent for Lee & Associates to give us a variety of options with owners that would more assuredly give SWAN a proposal. To date, we have visited 9 buildings and 13 offices that met our basic space requirements. We reviewed the floor plans and options for each office and narrowed the choices to three. Our agent with Lee & Associates has requested proposals for the three. We are waiting for the proposals, but the three selected options are the following.

#### Option 1: Westmont 2,535 square feet

The office offer is a “speck suite” which means it is ready for move-in and is fully furnished. It is ideal for an organization that is aiming to have a small office for staff to use in a hoteling arrangement. There are private offices and open floor plan with cubicles for staff to collaborate. The building also has a separate conference room that could be booked by any building tenants.

#### Option 2: Oak Brook 2,746 square feet

The building is a bit older, and the space requires more extensive changes to its layout. SWAN would need to provide furniture. There is a conference room available to all tenants for booking.



### Option 3: Rosemont 3,183 square feet

The space has been renovated recently and requires no changes. SWAN would provide furniture. The location is considered ideal for highway access. The building has a large conference room for booking, and a food court for staff or visitors.

I should have a recommendation by next month's SWAN Board meeting, depending on the proposals. The lease negotiation will take several weeks, between the owner's and our attorney at Klein Thorpe Jenkins. The goal is to have a finalized lease signed by July 1<sup>st</sup>.

### **RAILS Consortia Committee meeting update**

I attended the meeting on February 26<sup>th</sup> at RAILS Burr Ridge in person. The meeting agenda included an update on the RAILCAR data project, which has a goal to "provide a tool for analysis of quantitative and qualitative data related to LLSAP operations and member libraries, with a focus on informing prospective libraries about the landscape of LLSAP library membership." The packet included a [one page memo about the RAILCAR project](#). There will be a publicly available data comparison tool for libraries to use at some point.

### **GASB 96 & current budget**

Last month, the January 2024 balances for budget lines 5440 Library Services Platform and 5460 Information Subscription Service were impacted by the completion of the FY23 audit. The accountant at Lauterbach & Amen provided this explanation:

*The reason for the big drop off in the expense accounts that you use for tracking is that the auditors backed out the items that we booked as FY24 prepaid expenses, effectively moving the expenses in these accounts back to FY23, and then adding Asset/Liability accounts to record the Subscriptions on the books in FY23. What this means is that we aren't able to do anything within the current FY to be able to show the expenses the same way they were shown on the December 2023 reports. However, once the new FY begins, these adjusting entries will no longer impact the balance in your expense accounts. We will continue to track expenses as they are paid, just as we do now, and at Year-End will adjust based on the rules for GASB 96. So, for FY25, there will not be any audit entries hitting those expense accounts.*

## **Board Considerations**

### **Platform survey**

The Management Team met to review the written comments and categorize them. The results from the activity are included in this month's meeting packet under its agenda item.

## **Monthly Financial Report**

### **February Balance Sheet**

The Fund Balance Unrestricted line for February is at \$2,707,185.61 which is unchanged from the month prior. The table below shows the current FY24 budget expense and budgeted spending from reserves.

Fund Balance Unrestricted	\$2,707,185.61
Expenses to be paid from reserve	(\$73,800.00)
	\$2,633,385.61
SWAN annual expense budget	\$4,236,587.00
	62%
Number of months operating expense in reserve	7.5

### Revenue & Expense Report

This month would be 67% of the budgeted revenue and expenses. SWAN’s financials are presented on a cash basis for this current fiscal year 2024. The total revenue is reflected in the library membership fees invoiced for three quarters, plus invoices sent for the full year of the EBSCO group-purchase, which has our revenue at 78%.

	FY24 Budget	Ending February 2024	Percentage of budget YTD 67%
<b>Total Revenue</b>	\$4,236,587.00	\$3,298,966.39	78%
<b>Total Expenses</b>	\$4,211,277.00	\$2,587,320.39	61%
<b>Over / (Under)</b>	<b>\$25,310.00</b>	<b>\$711,646.00</b>	

### Accounts Receivable

4010 - SWAN Full Membership Fees: 3<sup>rd</sup> quarter invoices were sent out in January 2024, reflecting 75.04% revenue. The 4<sup>th</sup> quarter invoices will be sent out in April.

4011 – Internet Access Membership Fees: the six school libraries have been invoiced for membership fees.

4190 – Member Group Purchase Receipts: 105.18%

This budget line records the revenue from several group purchase initiatives in specific budget line expenses, including the EBSCO database group-purchase, hardware sold to libraries (magnetic swipes for e-commerce), and the group-purchase for Library Pass Comics Plus.

4310 – RAILS Support to SWAN: 75.10%

3<sup>rd</sup> quarter payment was made to SWAN totaling \$124,759.50 in October. The 4<sup>th</sup> quarter payment will be received in April.

4510 – Interest Income: 258.05%

SWAN’s Money Market continues to perform better than expected for the year. Currently, the rate for January is 5.55%.

## **Accounts Payable**

5000 – Salaries & Wages: 64.42%

This line remains on budget for the year-to-date expenses.

5021 – FICA Expense: 62.25%

This line remains on budget for the year-to-date expenses.

5023 – Worker’s Compensation: 109.07%

The insurance was paid for the full year in September.

5024 – Retirement Benefits: 66.91%

This line remains on budget for the year-to-date expenses.

5110 – Rent/Lease: 76.61%

This line remains on budget for the year-to-date expenses.

5130—Property Insurance: 98.77%

The flood insurance was paid for the full year in September.

5420 – Application Software Licensing: 84.52%

Expenses include Asana project management subscription, Mailchimp monthly, Adobe Creative Cloud, and desktop security with Panda.

5430 – Server Software Licensing: 93.66%

Expenses related to the Microsoft Azure hosting of Symphony and the support/ticketing systems are recorded in this budget line.

5440 – Library Services Platform: 40.21%

This line reflects changes from the FY23 audit, which impacts the current FY24 expenses for contracts SWAN has with SirsiDynix and EBSCO (for OpenAthens and Discovery Service). The full payment to Illinois State Library group-services OCLC was recorded in August. This line reflects prepaid expenses from the prior fiscal year for SirsiDynix, ByWater Solutions, OpenAthens, and EBSCO Discovery Service.

5450 – Data Management Services: 81.49%

The annual NCOA project was completed and expenses with Unique Management are now reflected. The expenses for RDA ToolKit and WebDewey are paid in full for the year.

5460 – Information Subscription Service: 26.58%

This line reflects changes from the FY23 audit, which impacts the current FY24 expenses for contracts SWAN has with EBSCO for Novelist Select integrated within the Aspen Discovery catalog. This budget line reflects the ProQuest subscription to Syndetic Solutions for all cover art display in Aspen and MessageBee email notifications.

5490 – Group Purchases Services: 1,666.25%

This line is overbudget due to the new Library Pass Comics Plus online subscription, and the data extraction for Prairie State College which decided to exit SWAN. Libraries were invoiced by SWAN and recorded payments in the #4190 Member Group Purchase Receipts as revenue. Additional one-time purchases for Pseudo Library licenses from SirsiDynix will occur throughout the year.

5850 – Contractual Agreements: 130.08%

The expenses for the addition of Addison Public Library (ADD) is reflected in this budget line, along with expenses for data extraction for Prairie State College (PCS). These expenses were recorded in December 2023, and are offset by revenue (4320 Other Grant Revenue) after those libraries are invoiced to cover the expense.

5860 Notification & Collection: 54.75%

This line remains on budget for the year-to-date expenses. The MessageBee service is paid monthly. SWAN has also contracted with Unique Management to print all user notices and is invoiced monthly.

5990 – Group Purchases – Content: 100.89%

July recorded the full EBSCO group-purchase expense for FY24 as a group-purchase, the expense was off-set by the participating libraries, with the revenue recorded in the #4190 Group Purchase Receipts.

# Operations Report: February 2024

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## Summary

Membership engagement activities and statistics are reported through the month-end of February 2024. System outages will be reported as of final assembly of the report to ensure that any critical system issues are documented as quickly as possible. Highlighted activities represent on-site library events.

## Member Engagement – All Staff

A recap of member engagement activities in February 2024.

## Site Visits, Training, and Consultation

Member engagement activities, including meetings, on-site visits, training, and consultation are noted for the reporting period. Highlighted activities represent on-site library events.

Date	Event Name	Teams Responsible	Category
2/6/2024	Committee of the Whole Meeting	Administration	Governance
2/7/2024	ILL Users	Administration	Membership Meeting
2/7/2024	School Cards Discussion (WRS)	Administration	Consultation
2/7/2024	Inventory, Reports, and Lost Item Consultation (NUD)	Information Technology & System Support	Consultation
2/8/2024	Acquisitions and Cataloging Users	Bibliographic Services	Membership Meeting
2/13/2024	Aspen Users	User Experience	Membership Meeting
2/14/2024	Consultation on Bib/Item Loading (WDD)	Bibliographic Services	Consultation
2/15/2024	ILL/Circ/Quarterly Billing Office Hours	Information Technology & System Support; Administration	Consultation
2/16/2024	SWAN Board Meeting	Administration	Governance
2/19/2024	Directors Coffee Hour	Administration	Consultation
2/21/2024	Circulation Users	User Experience; Information Technology & System Support; Bibliographic Services	Membership Meeting
2/22/2024	e-Resource Advisory	User Experience	Membership Meeting
2/23/2024	Addison Public Library In-Service Presentation	Administration; Bibliographic Services; Information Technology & System Support	Consultation
2/27/2024	SWAN Fireside Chat	All	Membership Meeting

## User Group and Advisory Meeting Recap

All 2024 meetings are posted in L2, search "[swan2024](#)." On the SWAN Support Site, visit the [SWAN Events Calendar](#) for a full listing of upcoming events.

### ILL Users (2/7/2024)

ILL Users this month included an update from Helen Pinder on implementation of systemwide updates to Real Time Availability implementation, which involves the inclusion of more item statuses to the list that will appear as unavailable for ILL. The group also hosted a general discussion on ILL local practices and departmental structure and a look at paperless ILL processing.

### Acquisitions and Cataloging Users (2/8/2024)

SWAN hosted the Acquisitions and Cataloging Users meeting via Zoom on 2/8/24. The co-chairs, Susana Leyva of Palos Heights Public Library and MaryKellie Marquez of Warrenville Public Library, discussed topics from the forums such as standards for item barcodes, Toniebox cataloging, packaging for Nintendo Switch game cartridges, and processing for vinyl records. The co-chairs also led a discussion about inventory procedures and recommended practices.

SWAN staff shared some reminders and updates for the members as well. Claudia Nickson reminded attendees to only use the Duplicate Title Wizard when using bibliographic templates and discussed the 946 signature tag. Vickie Totton shared some acquisitions cleanup reports SWAN would like members to run to prepare for fiscal rollover and maintain a clean catalog. Samantha Dietel announced new Acquisitions Office Hours for 2024, which will focus on specific topics such as fiscal rollover. She also led an activity for brainstorming the necessary features required for libraries to move from Symphony Acquisitions to BLUEcloud Acquisitions. This activity was not recorded, but a summary of feedback is posted as notes in the event information.

### Aspen Users (2/13/2024)

Topics at Aspen Users included an update of what's new in Aspen and LiDA; a discussion on tips for theme modifications; and improvements the group would like to see with managing lists.

### Circulation Users (2/17/2024)

In Circulation Users, Crystal shared the reorganization to Circulation documentation that she recently completed, and the group discussed best practices for staff cards, smelly items, and database signatures. In addition, they discussed practices around creating online library cards and Indian Prairie shared their practices for creating full access digital cards in Patron Point both in the library and online.

### E-Resource Advisory (2/22/2024)

The group worked on developing documentation for e-resource accounts and new library cards. Olivia is shaping this activity into documentation for the SWAN support site. In addition, the group ranked their ideas for group purchase investigations and discussed the statewide database RFP.



## Major Projects & Research

### Aspen Discovery

Aspen release 24.02 went live on February 14<sup>th</sup>. It included major performance improvements for indexing that cut our index times in half. Previously, we saw instances where our indexes would run into the afternoon, delaying item status updates. Following this release, we experienced some hiccups with the indexes needing a manual kickoff during the day. Bywater staff adjusted our server specifications and we're now enjoying consistent, speedy indexes.

### Aspen LiDA

With the 24.02 release LiDA now includes events integration. Bywater is still working on additional development to bring events to the fore in the app, but the initial integration is complete. Libraries that have added their Library Market, Communico, or Springshare calendars will see events in both Aspen Discovery and Aspen LiDA.

We are still working with Bywater to connect Symphony for Scan-and-Go, the self-checkout feature in the LiDA app.

### Cards for Students Project

We have begun talks with two libraries about creating batch patron records for students in local school districts. Woodridge Public Library and Evergreen Park Public Library have both approached us with similar projects in mind. They have entered into partnerships with school districts in their service area.

Students in these school districts will be registered for juvenile cards at their respective libraries, provided parents provide their consent. As these cards and user accounts will be no different from the card a child would receive during regular patron sign-up, SWAN is working on a script to deduplicate incoming registration lists from our existing member database. Students without existing cards will have a profile created, but students with an existing SWAN profile will be forwarded to the library for follow-up.

Woodridge is still in the planning phases and hopes to launch the program this summer. Evergreen Park wishes to start a pilot with one school in their district ASAP. We are excited to get these programs moving so we can be ready if any other member libraries come forward with similar requests.

### Patron Purge >7 Years

The first patron purge at this reduced inactivity interval took place on February 15<sup>th</sup>. This resulted in the removal of over 40,000 inactive patrons from the database. This concludes the Patron Purge adjustment project for 2024. The last phase of our transition to removing patrons after 5 years of inactivity will take place starting in December and will conclude in February 2025.

## SmartPort Migration

Bibliographic Services moved Theosophical Society, Morton Arboretum, and Bloomingdale Public Library from SmartPort to “MARC Listener” to ensure more accurate data is being imported into the database.

## Ticketing System and CRM Search

The ticketing system search team has decided to revisit HaloITSM before making a final selection in March. We have had challenges finding a CRM tool that will meet our use case, as many vendors tie their CRM features into a separate sales platform that isn’t well integrated with their support platform. For this reason, we have eliminated Zendesk from consideration.

## External Collaboration & Partnerships

Meetings represent formal project-based meetings with vendors and collaboration projects within the larger library community.

Date	Event Name	Teams Involved	Topic
Alternate Tuesdays	ByWater - Aspen weekly check-in	All (UX Lead)	Partnerships
2/2/2024	OCLC Cataloging Community Meeting	Bibliographic Services	Partnerships
2/14/2024	RAILS Member Update	Administration	Partnerships
2/20/2024	Aspen for Symphony Users	All	Partnerships
2/22/2024	OHM Project Chat	Administration	Partnerships
2/28/2024	LGBTQIA+ Working Group Meeting (DEI in Metadata Networking Group)	Administration	Partnerships
2/28/2024	SirsiDynix SureSailing	All	Partnerships

## Support, Documentation, and Training

Details on support tickets, documentation, and training.

### WorkFlows Login Password Update Consultations

Vickie Totton has been spearheading our password update initiative. Libraries have been using our Zoom Scheduler to setup 30-minute consultations during which WorkFlows user passwords are updated. This has also been an excellent opportunity to verify the email addresses associated with their email alias as well as confirm their current staff is reflected in L2. The L2 confirmation will prepare us for our planned SSO project.

### End of Life Firewall Replacements

In late 2023, SonicWall informed us that ten of our firewalls will be considered EOL in early 2024. Ian Nosek consulted with the affected libraries to determine if they would continue to have a SWAN

managed firewall or sign our self-maintenance agreement, allowing the library to purchase a suitable replacement and manage the device internally.

Of the ten libraries, only eight requested that SWAN proceed with replacing the ageing firewall. Of those eight, one has opted to transition to the self-maintenance option after the new hardware is installed. The eight firewalls arrived in late February – Michael Szarmach and Laurie Casiano will be pre-configuring the hardware and scheduling an installation date with the libraries.

### Outage tracking

Our Web Services 6.4.0 upgrade occurred on Wednesday, February 28. While this was scheduled, due to some time zone confusion, SirsiDynix began the upgrade shortly after 8PM, instead of after library hours. Fortunately, this upgrade only caused a brief Web Services outage of less than ten minutes. The upgrade was completed around 8:30PM.

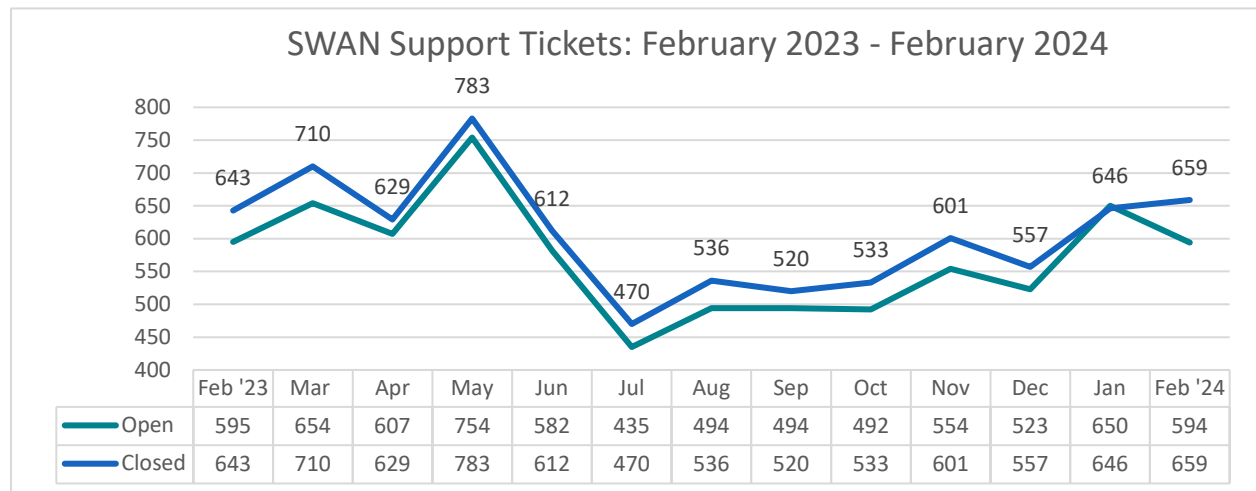
### System Maintenance & Outage Calendar

📅	Aspen Test Release	Fri 1/5/2024	Sat 1/6/2024		Aspen
📅	Symphony Halt Required - System Files Misp...	Fri 1/5/2024	Fri 1/5/2024	A directory of system files was unexpectedly relocated – this caused errors in Symphony. Files were rest...	Outage, SirsiDynix
📅	Aspen Production Release	Wed 1/17/2024	Thu 1/18/2024		Aspen
📅	Aspen Test Release	Thu 2/1/2024	Fri 2/2/2024		Aspen
📅	Test - Web Services 6.4.0 Upgrade (Scheduled)	Wed 2/7/2024	Wed 2/7/2024	We now have you scheduled for a "Upgrade Web Services (Test, Local) from 6.3.0 to 6.4.0" on 2/7/2024 ...	SirsiDynix
📅	Aspen Production Release	Wed 2/14/2024	Thu 2/15/2024		Aspen
📅	Symphony 4.1 Upgrade (Test)	Mon 2/26/2024	Mon 2/26/2024		SirsiDynix
📅	Production - Web Services 6.4.0 Upgrade (Sc...	Wed 2/28/2024	Wed 2/28/2024	We now have you scheduled for a "Upgrade Web Services (Production, Local) from 6.3.0 to 6.4.0" on 2/...	Outage, SirsiDynix

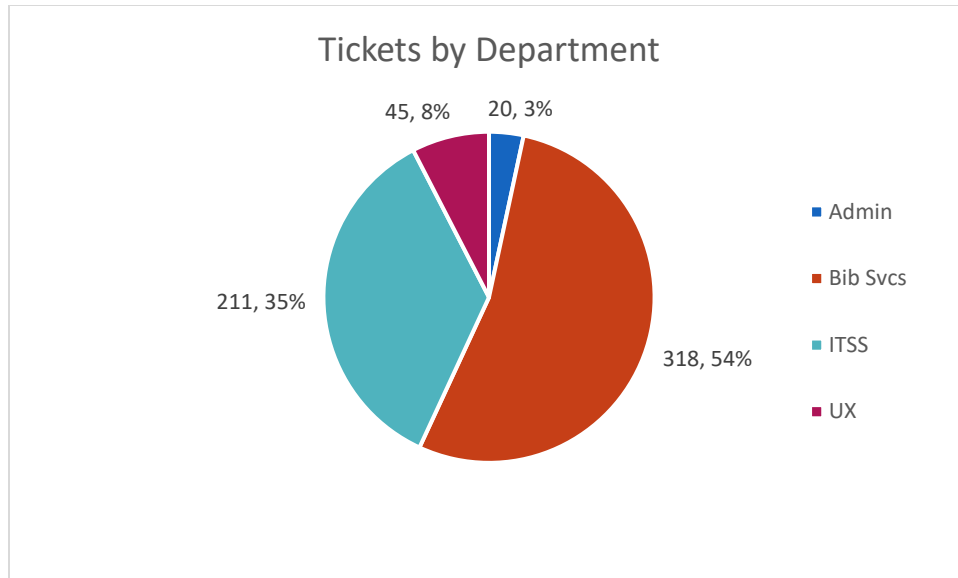
### Support Tickets

SWAN support staff continue to maintain an excellent monthly Open/Closed ticket ratio. Overall ticket volume has been fairly consistent.

Data labels reflect tickets closed each month.



SWAN Support Tickets Opened/Closed in Past 12 Months



**SWAN Support Tickets Assigned by Department**

## Support Site

We rolled out a new ticket submission form, which suggests news, known issues, and documentation when submitting a ticket. We also implemented a search suggestions feature in the support site search. Work is underway to make additional improvements to site search and speed.

The Bibliographic Services team, along with Crystal Vela, are reviewing our cataloging, acquisitions, and serials documentation on the support site.

Olivia Montolin added documentation on the [FirstSearch Databases](#).

## Training Modules & Recordings

### Learning Management System (SWAN Online Learning)

In February we added 13 new users to the SWAN Online Learning management system.

## On-site Training and Consultation

### Loading Bibliographic Records Training

Sam met with Wooddale Public Library staff to demonstrate how to set up 9xx mapping with vendors to load bibs, call numbers, and items into the catalog. This is a step between a full bib load and an acquisitions bib and order load, where libraries can automate adding bib and item information without needing to create acquisitions funds, vendors, and orders.

### Online consultation booking service

We have launched our new consultation booking feature on the SWAN support site at <https://support.swanlibraries.net/consultation>.

We presented this feature at our February Fireside Chat and the March Quarterly Meeting.

## OpenAthens Database Link Audit

Olivia is conducting an audit of libraries' database links over the next year to ensure that libraries are using the best authentication methods. OpenAthens provides single sign-on for databases and electronic resources and protects patron privacy.

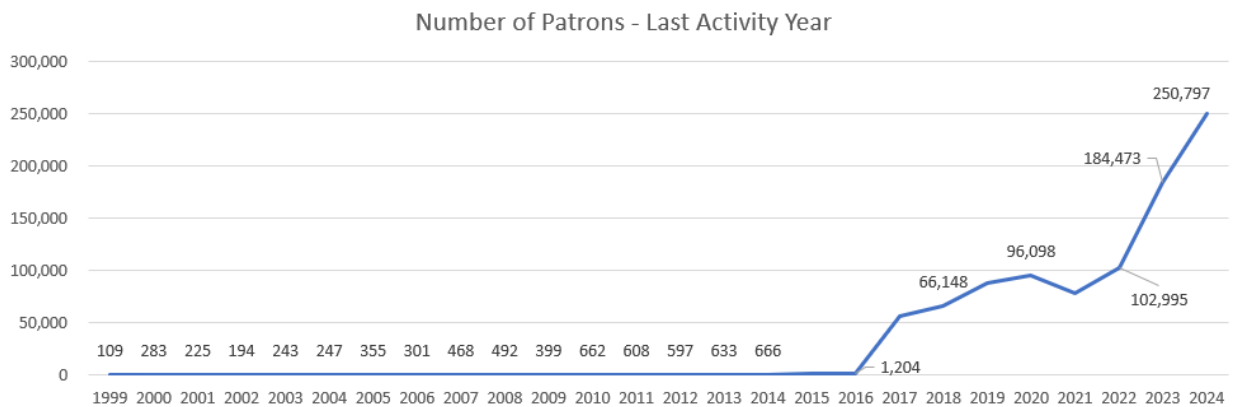
Links for the following libraries are available: Addison, Acorn, Alsip-Merionette, Batavia, Beecher, Bellwood, Bensenville, Berkeley, Berwyn, Bloomingdale, Bridgeview, LSF Brookfield, Calumet City, Carol Stream, Chicago Heights, Cicero, Clarendon Hills, Crestwood, Crete, Dolton, Downers Grove, Eisenhower, Elmwood Park, Evergreen Park, Flossmoor, Forest Park, Frankfort, Franklin Park, Geneva, Glen Ellyn, Glenside, Grande Prairie, Green Hills, Harvey, Hillside, Hinsdale, Hodgkins, Homewood, Indian Prairie, Itasca, Justice, Kaneville, La Grange Park, Lansing, Lyons, and Markham.

## Maintenance

### Automatic Monthly Patron Record Removal

In February, we purged 44,916 inactive patrons from the database. This elevated number was due to the change from removing patrons after 8 years to removing them after 7 years of inactivity.

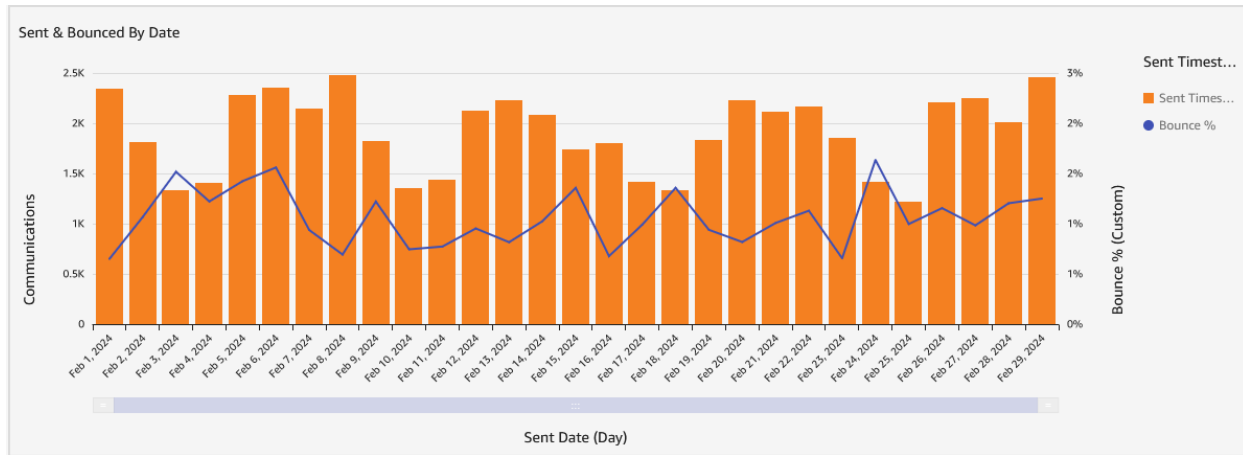
So far in 2024, there have been 250,797 patrons active in SWAN. Coupled with 2023 last-active users (184,473) this represents 46% of the total patron database. Since January 1, 2020, 76% of the total patron database has been active. As we continue to update and remove inactive users, the active percentage of patrons continues to increase. SWAN recommends purging all patron records with last activity date prior to 3/1/2014 regardless of outstanding bills.



# MessageBee Statistics

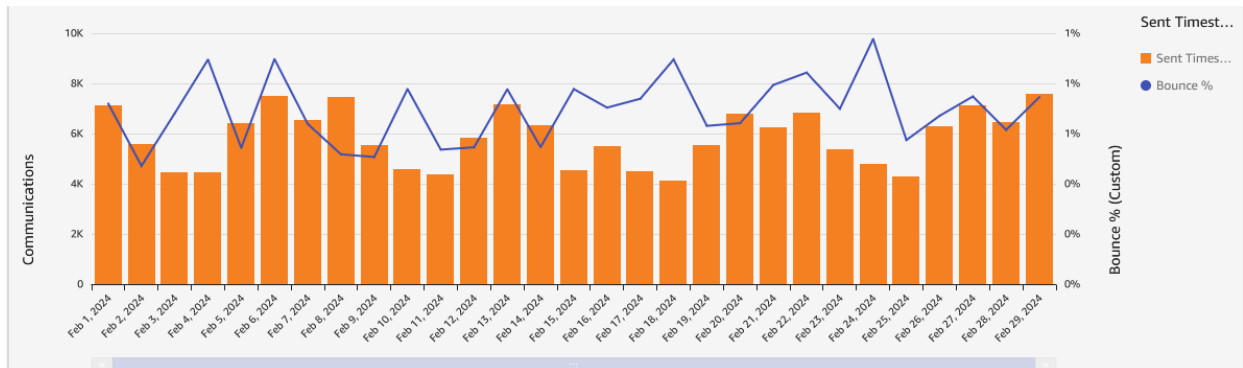
## SMS notifications

Month, Yr	SMS Sent	Success Count	Success Rate	Failed Count	Failure Rate
October, 2023	57,152	56,553	98.95%	599	1.05%
November, 2023	55,328	54,730	98.92%	598	1.08%
December, 2023	55,039	54,420	98.88%	619	1.12%
January, 2024	61,426	60,771	98.93%	655	1.07%
February, 2024	55,111	54,538	98.96%	573	1.04%



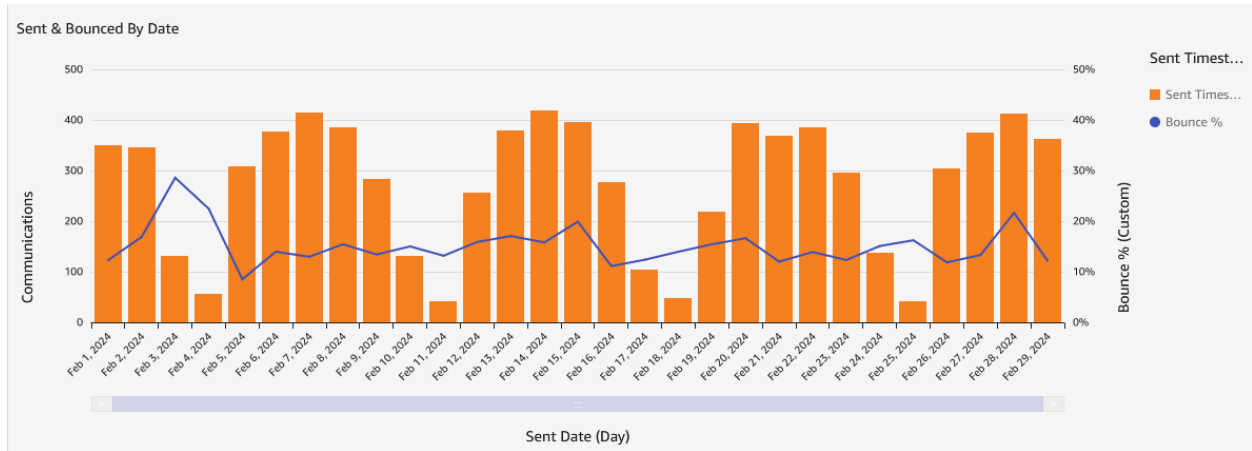
## Email notifications

Month, Yr	Email Sent	Success Count	Success Rate	Failed Count	Failure Rate
October, 2023	176,563	175,334	99.30%	1,229	0.70%
November, 2023	174,812	173,556	99.28%	1,256	0.72%
December, 2023	172,527	171,315	99.30%	1,212	0.70%
January, 2024	188,299	187,100	99.36%	1,199	0.64%
February, 2024	164,441	163,327	99.32%	1,114	0.68%



## Voice notifications

Month, Yr	Total Calls Attempted	Success Count	Success Rate	Failed Count	Failure Rate
October, 2023	7,347	7,009	95.40%	338	4.60%
November, 2023	7,239	6,911	95.47%	328	4.53%
December, 2023	6,804	6,494	95.44%	310	4.56%
January, 2024	8,016	7,629	95.17%	387	4.83%
February, 2024	7,383	7,020	95.08%	363	4.92%



## Print Notices

While not processed within MessageBee, Unique also provides our print notices.

Month/Yr	Bill Notices	Amount
October, 2023	490	\$ 421.89
November, 2023	577	\$ 496.83
December, 2023	499	\$ 429.63
January, 2024	581	\$ 501.95

## SendGrid Statistics

Our SendGrid success rate has remained above 99% after clearing out the invalid email addresses from our lists. A quick review of bounces in February has identified several Symphony reports that are still attempting to send results to invalid emails. These will also be cleaned up in the coming weeks.

So far, we have not seen any message delays or failures related to the recent email security requirements enforced by Google and Yahoo!.

Month	Requests	Processed	Success Rate (Delivered)	Addresses				Messages	
				Bounced	Spam Reports	Invalid	Blocks	Bounce Drops	Spam Drops
Oct, 2023	69,957	65,512	93.65% (65,057)	279	5	19	510	4,288	138

Nov, 2023	93,981	81,824	87.06% (80,525)	578	6	26	1,822	11,987	144
Dec, 2023	79,685	71,685	89.96% (70,801)	363	8	21	1,132	7,853	126
Jan, 2024	91,086	86,305	99.01% (85,455)	334	8	28	1,112	4,626	127
Feb, 2024	69,276	67,302	99.09% (66,692)	179	5	39	817	1,806	129

## SWAN Announcements

### Staff Development

#### Webinars and Trainings

Olivia attended OpenAthens Access Lab 2024 to learn more about upcoming browser and security changes affecting proxy authentication.

Crystal and Claudia attended the Articulate webinar “Applying Adult Learning Principles in E-Learning” to hone their skills in the creating of our self-paced trainings.

Aaron and Tara attended the ALA webinar “Introduction to AI Literacy with Chat GPT.”

## Appendix: Statistics

### Cataloging & Collections

Cataloging statistics highlight the shared bibliographic database of physical materials maintained by our SWAN libraries and SWAN centralized cataloging staff.

#### OCLC Cataloging Counts

*Counts do not include seventeen cataloging libraries. Original cataloging counts are new records created for SWAN and added to the OCLC WorldCat database. Copy cataloging counts are records downloaded from OCLC and added to SWAN’s bibliographic database.*

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
<b>Orig 2020</b>	99	111	69	152	98	129	88	102	76	62	56	46	<b>1,088</b>
<b>Copy 2020</b>	1,908	1,717	1,863	2,270	2,357	2,496	2,237	1,886	2,405	1,723	1,901	1,704	<b>24,467</b>
<b>Orig 2021*</b>	41	53	54	73	49	88	49	71	80	65	72	104	<b>799</b>
<b>Copy 2021*</b>	1,632	1,847	1,911	1,480	1,720	1,756	1,580	1,916	2,367	1,463	2,295	1,802	<b>21,769</b>
<b>Orig** 2022</b>	84	143	93	57	106	97	52	133	87	74	55	77	<b>1,058</b>
<b>Copy** 2022</b>	1,808	2,283	2,059	2,299	2,239	1,886	1,976	2,706	1,944	1,918	2,010	2,275	<b>25,403</b>
<b>Orig 2023</b>	114	123	187	197	164	146	57	38	34	104	111	40	<b>1,315</b>
<b>Copy 2023</b>	2,925	2,213	2,352	1,819	2,630	2,310	1,752	2,215	1,875	2,338	1,968	1,838	<b>26,235</b>
<b>Orig 2024</b>	134	149											



<b>Copy</b>	2072	1936
<b>2024</b>		

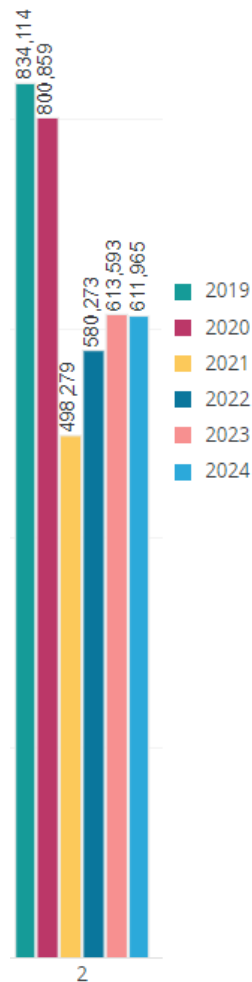
### Items Added

Since the beginning of the year, SWAN members have added 93,769 items to the Symphony database and 12,069 bibliographic records.

## Circulation

### Monthly total comparison since 2019

In February, we had 611,965 systemwide circulations. This is comparable to last year. This small graph shows up circulation has evened out since 2021. Numbers reached their current approximate level in summer of that year and have stayed consistent since.



## Hold

### Hold Placement & Pick-up

The number of patrons placing holds was 39,544 in January, with 188,186 combined total holds placed. We are still unable to distinguish between holds placed in Aspen versus LiDA, though ByWater Solutions is aware this is a priority for us.

### Interlibrary Loan & Resource Sharing

Interlibrary loan checkouts between SWAN members was 108,323 in January. Non-SWAN reciprocal borrowing included 18,494 checkouts.

### OCLC Worldwide Resource Sharing

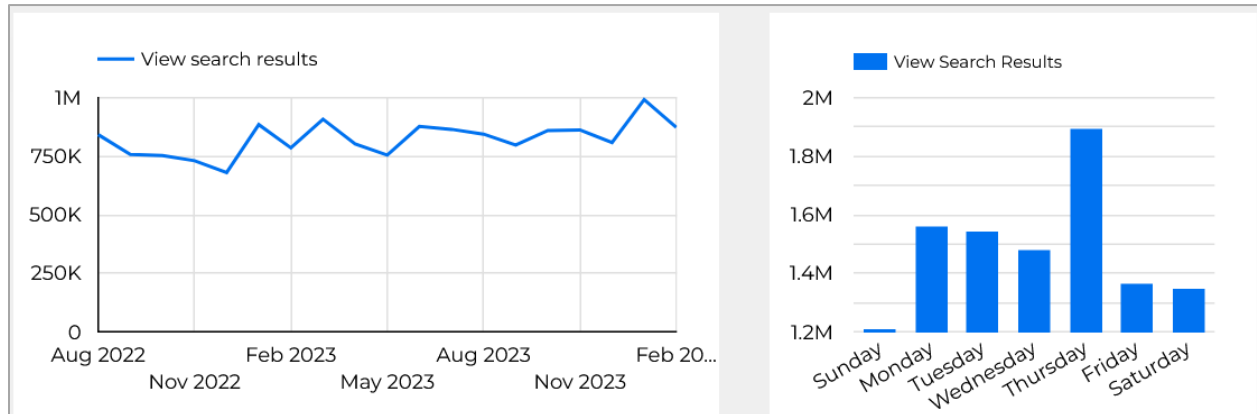
Our combined OCLC interlibrary loan statistics show that SWAN was again a net lender in February. This month, we lent 2,978 items and 27 copies and borrowed 1,338 items and 41 copies. SWAN loaned 2.2 items for each item borrowed. In February for the first time, SWAN library's average turnaround time to fulfill ILL requests was less than 1 day.

## Online Public Catalog - Aspen

### Top 25 Searches in Aspen (February 2024)

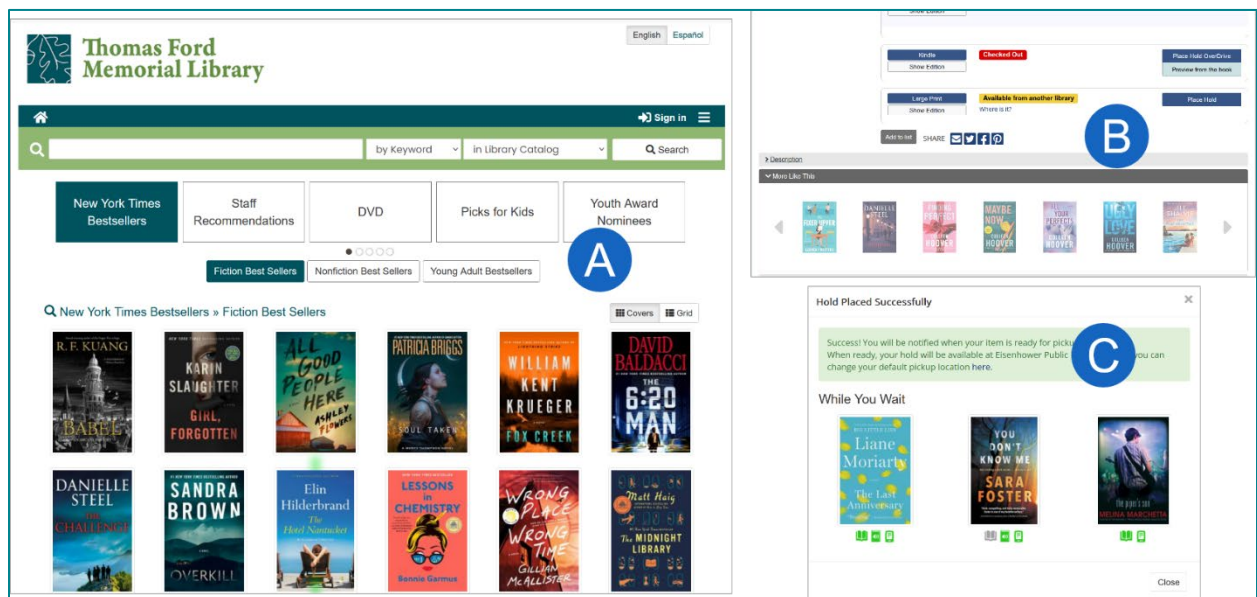
- |                               |                          |                        |
|-------------------------------|--------------------------|------------------------|
| 1. the women                  | 9. first lie wins        | 18. fourth wing        |
| 2. freida mcfadden            | 10. james patterson      | 19. minecraft          |
| 3. pokemon                    | 11. lessons in chemistry | 20. paw patrol         |
| 4. taylor swift               | 12. colleen hoover       | 21. movies             |
| 5. kristin hannah             | 13. nintendo switch      | 22. anatomy of a fall  |
| 6. killers of the flower moon | 14. napoleon             | 23. bluey              |
| 7. oppenheimer                | 15. dvd                  | 24. beyond books       |
| 8. poor things                | 16. dune                 | 25. historical fiction |
|                               | 17. harry potter         |                        |

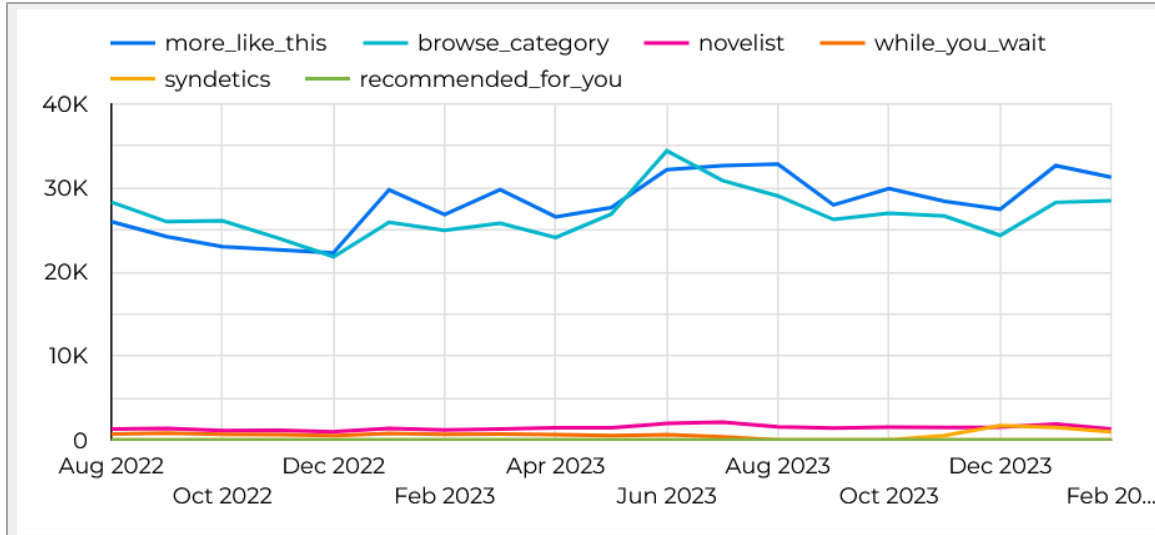
## Results Pageviews in Aspen



## Usage of Recommendations

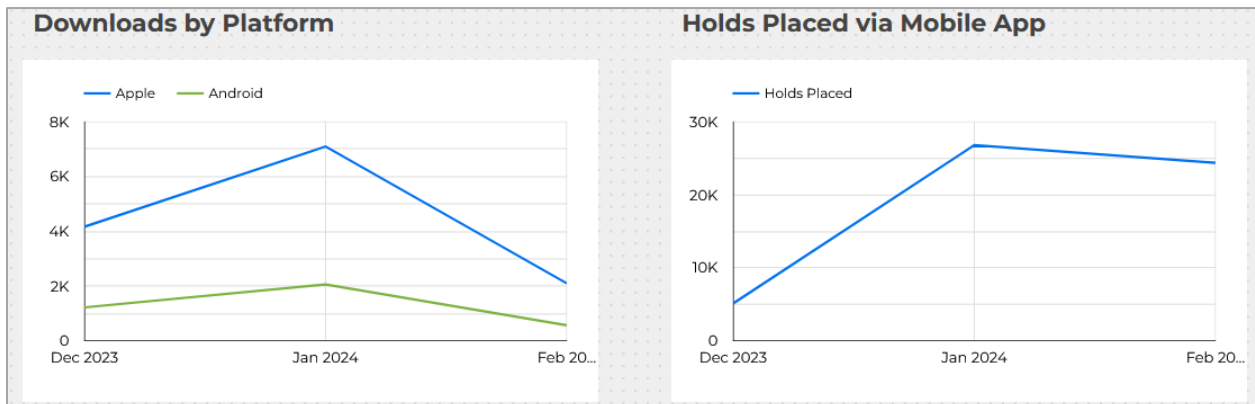
Browse categories appear on the home page and they are generated by library staff (A). “More Like This” are auto-generated by Syndetics and appear on a grouped work or record detail page (B). “While You Wait” are auto-generated by Aspen, and appear when you place a hold or view your holds and checkouts (C). This data measures clicks on title recommendations presented to patrons.





## SWAN Libraries + App – Aspen LiDA

January 2024 is the first full month of available statistics for the SWAN Libraries + app (the app was launched mid-month December 2023).



**SWAN**  
**Calendar-Timetable of Deadlines and Board Action Requirements**

<b>DATE</b>	<b>MEETING TYPE</b>	<b>ACTION ITEMS</b>
Friday, July 21, 2023	Regular SWAN Board Meeting	Elect Officers: President, VP, Treasurer, Secretary & Complete Signature Card Changes for Bank Accounts. OMA Officers must complete training. Nominate for committees.
Friday, August 18, 2023	Regular SWAN Board Meeting	Meeting conflicts with SWAN Expo. Decision on recommend to cancel meeting.
Thursday, September 7, 2023	SWAN Quarterly Meeting	Introduce new SWAN Board members
Friday, September 15, 2023	Regular SWAN Board Meeting	Closed session minutes 6 month review Identify SWAN policies to review. Review budget process timetable with SWAN Board.
Friday, October 20, 2023	Regular SWAN Board Meeting	Aaron begins work on FY25 budget, brings questions to SWAN Board if needed.
Friday, November 17, 2023	Regular SWAN Board Meeting	Board accepts FY23 audit. Aaron to bring FY25 Budget draft; Board discuss Fees and determines next steps. Board approves meeting dates for 2024 calendar
Thursday, December 7, 2023	SWAN Quarterly Meeting	Announce FY25 Budget Process
Friday, December 15, 2023	Regular SWAN Board Meeting	Review of FY25 Budget Draft
January 2024 (TBD)	SWANcom	Aaron Skog/Board announcement of draft budget to membership. Set February COW date and possible location of meeting.
Friday, January 19, 2024	Regular SWAN Board Meeting	Review and recommend draft of SWAN Budget for Membership presentation. Set COW date for February for membership review.
Tuesday, February 6, 2024	SWAN Committee of the Whole Meeting	Meeting to discuss FY25 budget, fees, and reserves worksheet.
Friday, February 16, 2024	Regular SWAN Board Meeting	Incorporate changes, suggestions to SWAN budget. Create recommendation to membership. SWAN Board Election Process Review.
Thursday, March 7, 2024	SWAN Quarterly Meeting	Roll call vote to approve SWAN budget. Announce Board election process.
Friday, March 22, 2024	Regular SWAN Board Meeting	Ratify budget. Determine if Personnel Committee meeting is needed.
Friday, April 19, 2024	Regular SWAN Board Meeting	Review and approve Board Self Evaluation Form; assign date for completion. Review proposed Bylaws changes (if any). Vote on recommendation to membership; send out SWANcom notification of amendment.
Friday, May 17, 2024	Regular SWAN Board Meeting	Director Evaluation - Provide results and discuss (Executive Session). Review Board Self-Evaluation Results.
Thursday, June 6, 2024	SWAN Quarterly Meeting	Board Election Results. Vote on Bylaw amendments (if any).
Friday, June 21, 2024	Regular SWAN Board Meeting	SWAN Executive Director evaluation. Review/Write Off Allowance for Doubtful Accounts.

## SWAN Board & Membership Meeting Schedule 2023 & 2024

Schedule for approved by SWAN Board

Friday, July 21, 2023	Regular SWAN Board Meeting	Midlothian Public Library
Friday, August 18, 2023	Regular SWAN Board Meeting	Canceled
Thursday, September 7, 2023	SWAN Quarterly Meeting	Oak Brook Public Library
Friday, September 15, 2023	Regular SWAN Board Meeting	Acorn Public Library District
Friday, October 20, 2023	Regular SWAN Board Meeting	Acorn Public Library District
Friday, November 17, 2023	Regular SWAN Board Meeting	Palos Heights Public Library
Thursday, December 7, 2023	SWAN Quarterly Meeting	Oak Brook Public Library
Friday, December 15, 2023	Regular SWAN Board Meeting	Homewood Public Library
Friday, January 19, 2024	Regular SWAN Board Meeting	Homewood Public Library
Friday, February 16, 2024	Regular SWAN Board Meeting	Roselle Public Library District
Thursday, March 7, 2024	SWAN Quarterly Meeting	Oak Brook Public Library
Friday, March 22, 2024	Regular SWAN Board Meeting	Bloomington Public Library
Friday, April 19, 2024	Regular SWAN Board Meeting	Bloomington Public Library
Friday, May 17, 2024	Regular SWAN Board Meeting	Blue Island Public Library
Thursday, June 6, 2024	SWAN Quarterly Meeting	Oak Brook Public Library
Friday, June 21, 2024	Regular SWAN Board Meeting	Midlothian Public Library

# Platform survey comments: part 1

Produced by Aaron Skog, Cynthia Romanowski, Ian Nosek, Tara Wood, Scott Brandwein

## Introduction

This analysis was completed using written comments from the survey on SWAN software platforms. The SWAN management team completed an analysis of the platforms WorkFlows, Analytics, MobileCirc, and Aspen Discovery. Priority at this stage was given to SirsiDynix products. We expect to complete the analysis of survey comments of MessageBee and OCLC by the April meeting of the SWAN Board.

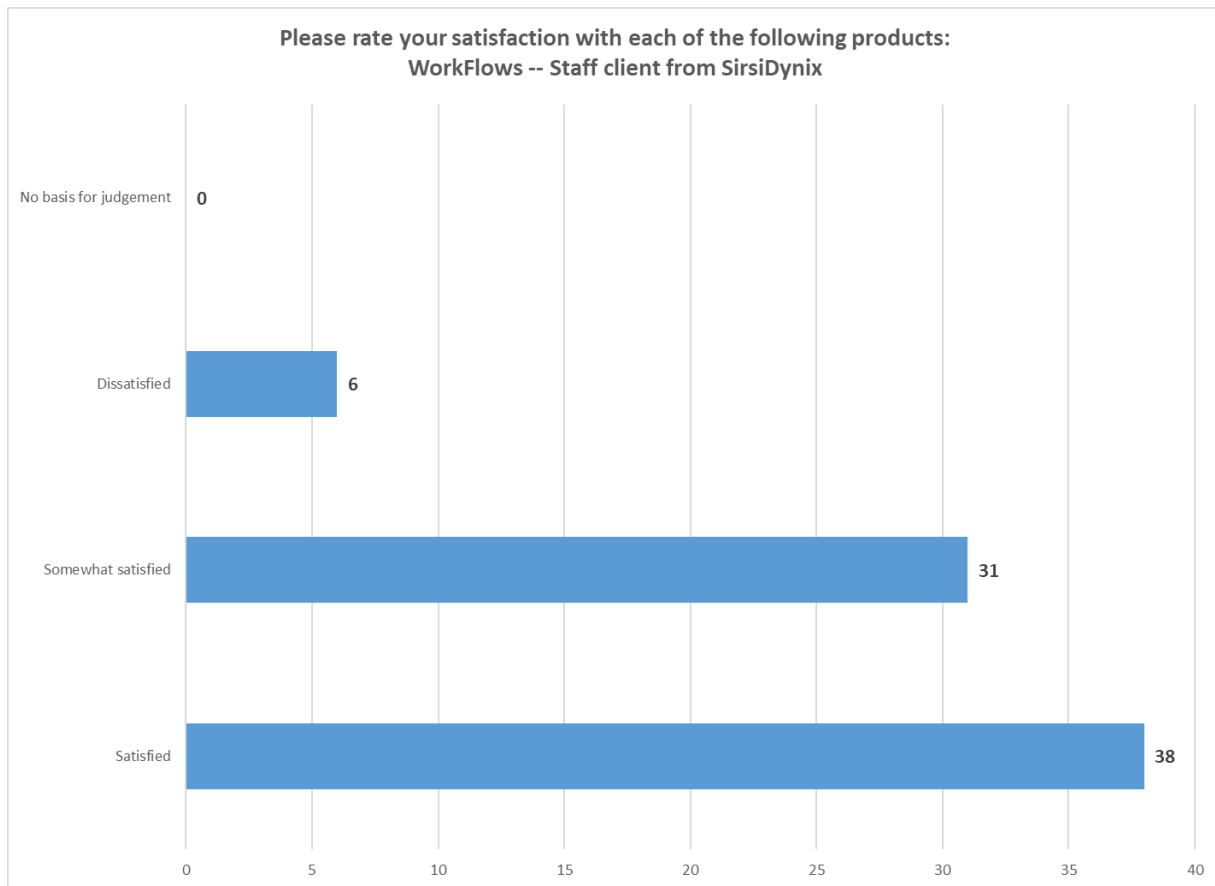
## Process

The SWAN management team organized and reviewed the platform survey submissions. The survey’s written comments were analyzed using an affinity diagramming technique where comments were organized by the responding library and the specific platform into a spreadsheet. Some written comments were extensive depending on the library. These comments in spreadsheet form were then imported into a sorting tool called a Miro board. The sorting was further refined based on the comment. After the sorting activity, we met several times to develop the “themes and issues” under each software platform, and to come up with suggested solutions.



Figure 1: Affinity diagram with comments using color coded system for software platform.

# WorkFlows



## Issues and themes

- Hold queues are confusing to library staff when asked by patrons “when will my requested item arrive?”
- Placing holds for several copies of a title is cumbersome, which was noted for book clubs and schoolteachers.
- Searching within WorkFlows presents challenges for misspellings and typos.
- Searching is also difficult when looking by topic/subject.
- Many staff reported that the Workflows interface is simply clunky, dated, and unintuitive.
- Workflows’ stability was mentioned by libraries frustrated by crashes/freezes. One library mentioned indexing issues affecting technical services.
- The Acquisitions module received criticism for its complexity in performing simple tasks and frustrations with its reliance on the crowded Workflows reports queue.
- In Cataloging, staff mentioned a number of smaller frustrations with interface and behavior such as the inability to delete items with holds and search results display.
- Some libraries mentioned issues with too many or too few wizards available in certain log-in profiles. Some staff would like more opportunity to customize their Workflows experience.
- Requests for a portable version came from one library who wished to take Workflows to offsite events and another that specifically requested we investigate SymphonyWeb.



- Management of patron information is a point of frustration. Users want the ability to manage more patron profile information and holds from one screen rather than having multiple tabs open. Multiple libraries requested the ability to quickly access more “previous user” profiles than the one currently available. Staff also expressed an interest in masking personal identifying information by default while viewing a patron profile.
- Frustrations with billing included a confusing interface with too many options and the loss of title information when an item is removed from a patron’s record prior to a referral.

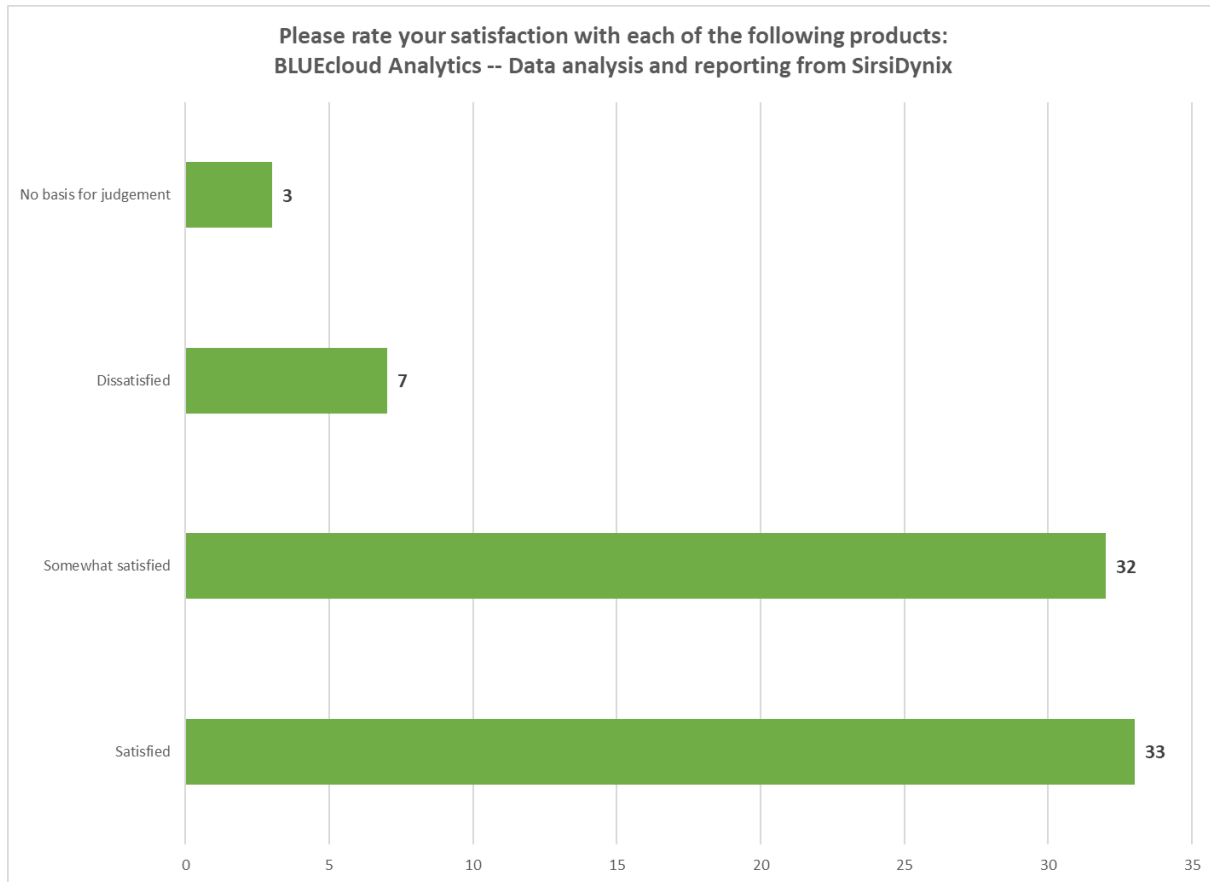
## Action steps

- As searching in Workflows does require specialized expertise, we can promote existing training resources on this topic and create further resources on specific user scenarios.
- Hold queues are difficult to interpret, and hold queue positions can be misleading. SWAN may benefit from developing unified messaging (through the patron interface and from library staff to patrons) to help manage patrons’ expectations regarding fulfillment.
- Continue providing priorities to SirsiDynix to influence the development of BLUEcloud Acquisitions and Cataloging to address pain points in the Workflows Acquisitions and Cataloging modules and current BLUEcloud version.
- We have two comments that we intend to follow up on with the library.

## Big Ideas

- SWAN can develop a Holds Working Group from within our membership to re-evaluate holds strategy, develop goals, and implement changes. This could help to prioritize how we configure our current Symphony ILS or how we evaluate holds in a new ILS. Some solutions that were identified in the 2019 Clarity Report that a Holds Working Group should be considered:
  - Implement consistent lending policy across the membership (e.g. allow holds to be placed on all items).
  - Develop method where a hold can be placed on every title by any patron, essentially implementing a model of patron-driven acquisition based on first-copy trigger in SWAN.
  - Develop a tool to estimate hold wait time.
  - Provide alerts/reports when patrons have holds on titles that are not available for fulfillment and thus become purchase alerts for patron home library.
- Evaluate SirsiDynix’s SymphonyWeb as a tool for easier remote access to the Workflows staff client and improved connectivity. We will also investigate whether this tool will open a pathway to more customized user experiences. Currently, SymphonyWeb is an add-on product and it allows WorkFlows to run in a web-browser. This product was not under consideration as BLUEcloud is our future interface for library staff, but SymphonyWeb may have a role to play within SWAN.

# BLUEcloud Analytics



## Issues and themes

- The BLUEcloud Analytics platform was described as “difficult” or “intimidating” or “not user friendly.”
- Comments indicate that the organization of reports within Analytics is confusing by the large number of created reports.
- Staff would like the ability to create custom reports and experiment, rather than rely on SWAN staff to create reports.

## Action steps

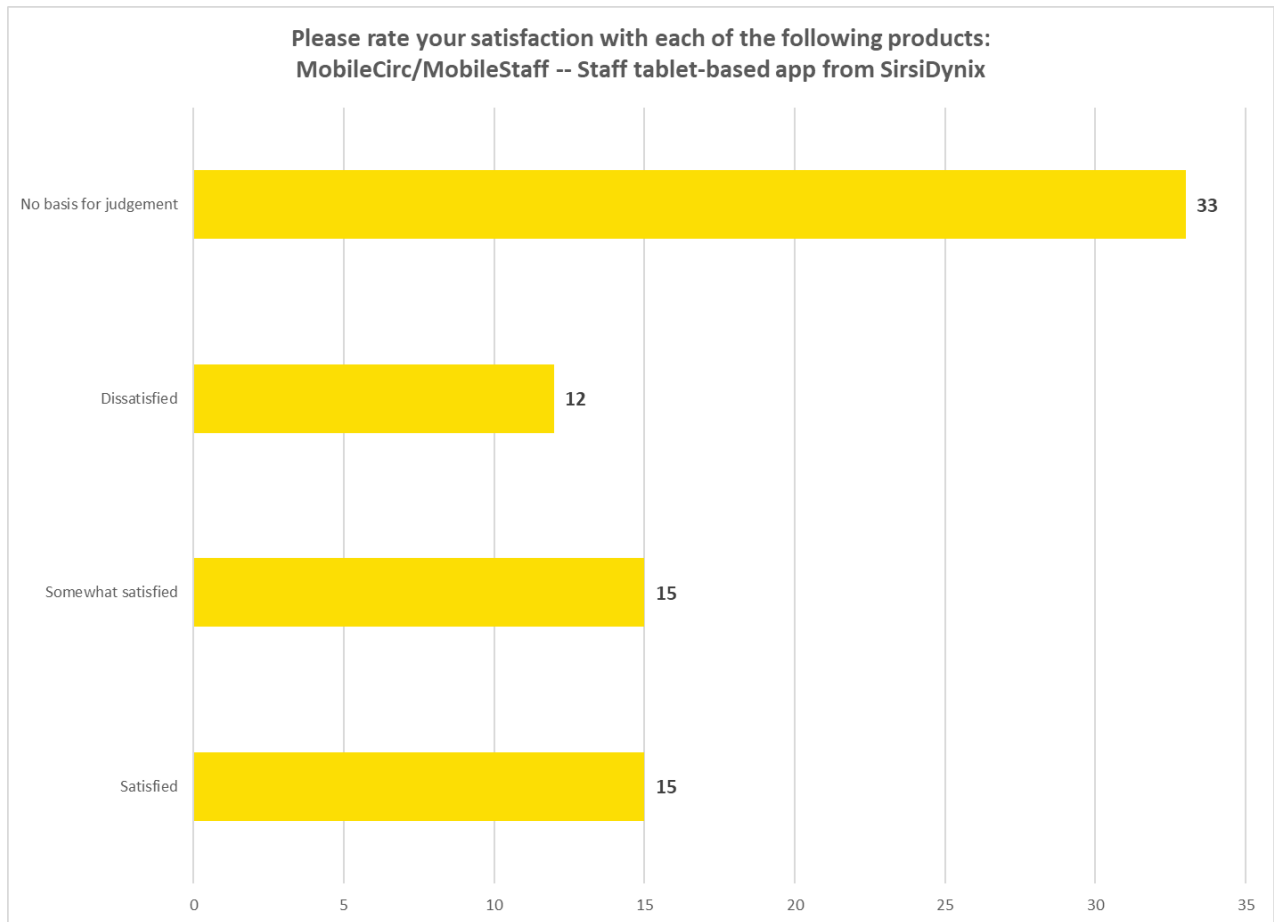
- We have several training opportunities based on comments, such as creating training videos on how to run different reports and customize them for the library.
- SWAN staff can conduct research with members to enhance report labeling and folder organization, and better understand the delivered reports that would be most helpful for members.
- SWAN staff can explore training opportunities, both internally created training and training available through SirsiDynix.

- We have three comments that we intend to follow up on with the library.

## Big Ideas

- SirsiDynix has released a new option for Analytics called “Private Suite” which has an expanded feature set that SWAN should consider migrating to if it resolves some of the library staff issues pertaining to report creation and organization.
- Consider a 3<sup>rd</sup> party data repository for improved interface, performance, and to plan for a future beyond Analytics should SWAN decide to make changes to its library services platform.

## MobileCirc/MobileStaff



## Issues and themes

- MobileCirc/MobileStaff is described as generally difficult to set up and use. Difficulty ranges from issues with app stability, clunky interface, and frustration creating library cards at off-site events, with one library reporting they were unable to do so at all.

- Product is described as “bare bones” and does not provide features like extensive patron information, and workarounds that are available in Workflows. It was not clear in the survey what these workarounds were.
- No specific mention was made of using MobileCirc/MobileStaff for pull lists or inventory/weeding, though these are the areas on which SWAN documentation focuses.

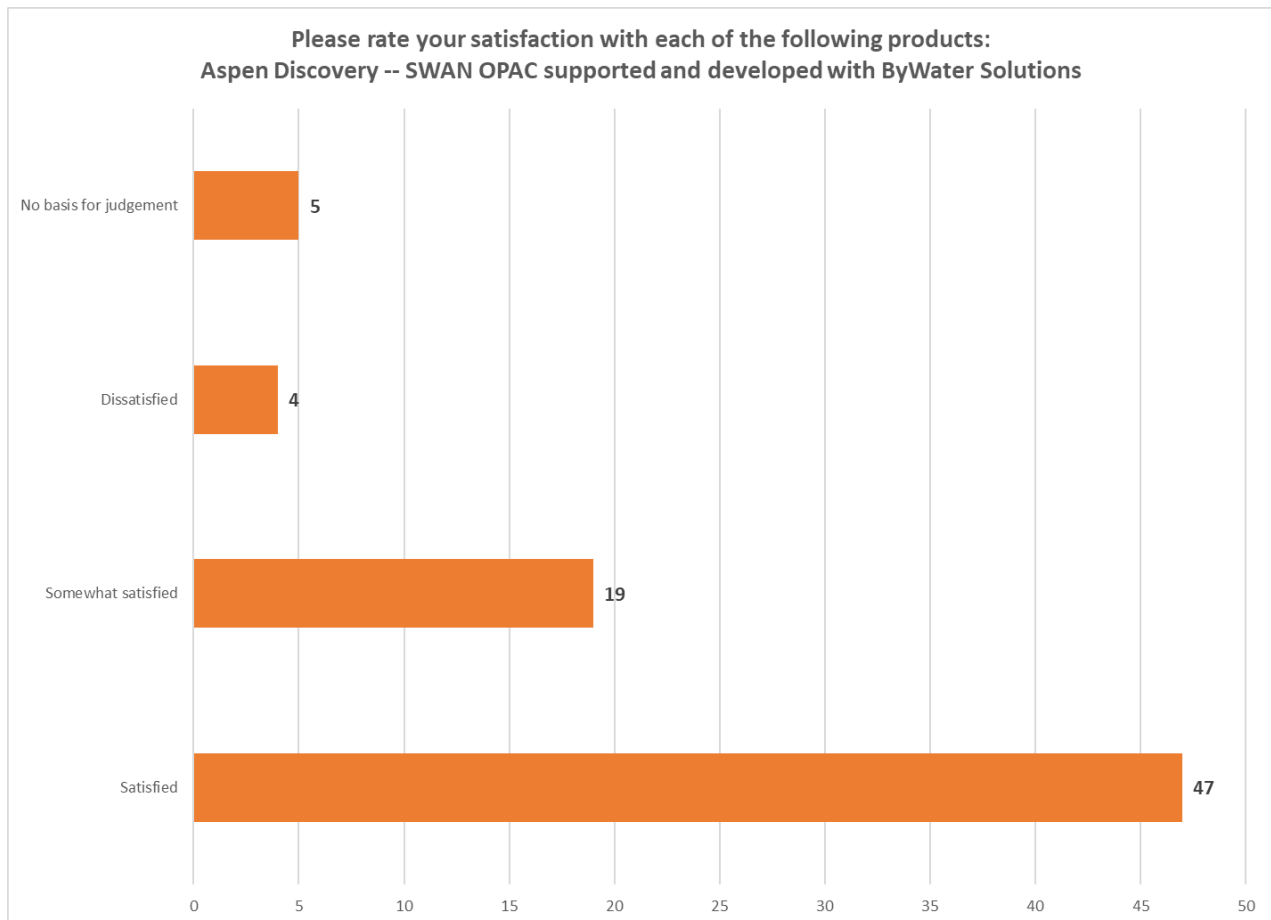
## Action steps

- Some functions of MobileCirc/MobileStaff could be soothed by a solid implementation of BLUEcloud Circulation, which can run in a tablet web browser. Evaluate BLUEcloud Circulation as a tool in this specific capacity.
- Review our SWAN documentation and training to better emphasize best use of MobileStaff off-site for card registration.
- Follow up with libraries having difficulty with patron registration to determine their hardware setup and whether we can make recommendations on obtaining the tools make MobileStaff more swift and reliable.
- Perform a MobileStaff device audit to verify that libraries are using compatible hardware and gain insight into how staff are accessing the tool.
- We have 2 comments that we intend to follow up on with the library.

## Big Ideas

- Explore SymphonyWeb for use as an off-site and patron registration tool. This would focus on the tool on a tablet and a laptop.
- Look into creative use of online patron registration tools either through Aspen Discovery or a third-party tool.

# Aspen Discovery



## Issues and themes

- Searching was called out as a pain point, in particular searches for subjects or for items without a specific title. Fuzzy searching and searches for misspelled words were also highlighted as areas for improvement.
- Search filtering presents some problems: resetting filters between searches or logging into masquerade mode is frustrating, filtering for juvenile materials brings up some adult items, and being unable to set multiple filters at once.
- Record grouping can be a searching issue as well. Responses highlighted instances where e-resource and physical editions were not always combined. One library mentioned graphic novel editions being grouped with text copies, and another that translations are not grouped together.
- Cover images are not always present, and sometimes cover images or descriptions do not match the item.
- The LiDA app can be slow to load, and one library mentioned preferring the browser version for this reason.
- Some libraries mentioned difficulties in List maintenance, including the inability to sort by call number or upload custom cover art.

- Issues related to locating items included being unsure whether their library owns an item and needing to check Workflows to verify, displaying other libraries' items when filtered to the home library only, available items appearing below unavailable items due to the fixed order of formats in a grouped work, and the inability to filter to a library other than the home library.
- Libraries also suggested a number of small-scale tweaks to the user interface such as a bolder "Where Is It?" button and color-coded e-resources.

## Action steps

- SWAN will investigate the ability to lock filters and strategize with ByWater on ways the filters can be made easier to use, such as selecting multiple or providing a "not" option.
- We can investigate means to improve native record grouping, including re-evaluating whether integration of name authority data would lead to more groups.
- Difficulties with searching and determining item availability may benefit from focused usage testing with member staff and patrons or targeted work with our Discover and User Experience Advisory Group to determine what the biggest pain points truly are. Though we had many comments and suggestions in this area, we did not observe many repeated comments that point to an obvious change to behavior or user interface.
- Address issues with record grouping through work with ByWater Solutions on their work to streamline grouping of graphic novels, abridgements, and distinct editions. Foreign language editions do not group by design, a choice made by the Aspen community at large. SWAN can work to better document the intricacies of grouping so the membership knows what to expect.
- SWAN is already working on a report of items using the default generated cover in Aspen. Using this report, members could upload covers for items that do not have cover art in Syndetics, our cover image provider.
- SWAN continues to work with ByWater Solutions on performance of the LiDA app and would like to investigate performance enhancements for the Web Services API.
- We will re-evaluate how we collect feedback on Aspen outside of user groups, regular meetings, and tickets. Based on the survey results, we need to smoothen pipeline to transmit ideas for improvement from member staff to the Aspen community.

# Platforms awaiting analysis

## OCLC

### Sorted categories

- OCLC general satisfaction (5)
- Statistics (1)
- OCLC clarification (2)
- WorldShare ILL (5)
- WorldCat (2)
- Cataloging/metadata (2)
- Holdings (2)

## MessageBee

### Sorted categories

- SMS (3)
- Reliability (1)
- Reports & statistics (4)
- Interface (1)
- Support (2)
- Images (1)
- Autorenewals (13)
  1. Broadview (2)
  2. Bensenville (2)
  3. Wood Dale (1)
  4. Franklin Park (1)
  5. Green Hills (1)
  6. Westmont (1)
  7. Homewood (1)
  8. Roselle (1)
  9. Westchester (1)
  10. Justice (1)
  11. Tinley Park (1)

## Appreciation for platform (84)

### Sorted categories

- Aspen (30)
- WorkFlows (11)
- BLUEcloud Analytics
- MobileCirc/MobileStaff
- MessageBee (1)
- OCLC WorldCat/WorldShare (10)
- SWAN (8)

## Other topics

### Sorted categories

- Comments on ILS migration (4)
- SWAN in general (2)
- Communication challenges/opportunities
- General dissatisfaction with staff interface
- No opinion
- Opinion about survey
- Find More Illinois (1)