



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

Meeting Packet

June 6, 2024

10:00 A.M.



SWAN Administrators' & Directors' Quarterly Meeting

June 6, 2024

10:00 a.m. – 12:00 p.m.

Oak Brook Public Library

600 Oak Brook Road, Oak Brook, IL 60523

Please register in advance for access to the Zoom live stream:

<https://swanlibraries-net.zoom.us/meeting/register/tZEgdu-prTwjGtL6oPUXBfqjs4vF-ONSdAE3>

Agenda

1. Call to Order and Welcome
2. Public Comment
3. Introduction of New Library Directors
4. Action Item – Approval of the March 7, 2024 Quarterly meeting minutes (exhibit pgs. 2-3)
5. Information Item—Board election results
6. Information Item—Statewide subscription database announcement (exhibit p. 4)
7. Discussion Item – Website accessibility challenges for public libraries & SWAN's role (exhibit pgs. 5-24)
8. Information Item—Comics Plus SWAN deal for 2024: last chance forever!
9. Information Item—Symphony 4.1 upgrade on June 17th & 18th
10. Discussion Item—SWAN platform survey analysis (exhibit pgs. 25-37)
11. Discussion Item – Uses of banking ACH for SWAN payments
12. Announcements and Questions
13. Next meeting: September 5, 2024

Member Comment after each agenda item. The Quarterly Meeting will be live streamed via Zoom, but advance registration is required using the link above.

SWAN Administrators' Quarterly Meeting Minutes

March 7, 2024

10:00 a.m. – 12 p.m.

Oak Brook Public Library

600 Oak Brook Road Oak Brook, IL 60523

Meeting recording: <https://www.youtube.com/watch?v=2TxH42y8qZQ>

1. Call to Order and Welcome

President Cottrill called the meeting to order at 10:00 a.m. Blazek, Cottrill, Johson, Koll, Waltman, Wassenaar were present to establish a board quorum.

2. Public Comment

No public comment.

3. Introduction of New Library Directors and Visitors

None

4. Action Item – Approval of the December 7, 2023, Quarterly meeting minutes

Weseloh (West Chicago Public Library District) motioned, seconded by Craft (Clarendon Hills Public Library). Motion carried by unanimous vote.

5. Information Item – Board election for 2024

Skog reviewed the election process & timetable for the upcoming FY25 with two seats open.

6. Information Item – EBSCO group purchase renewal for 2024

Skog reviewed the EBSCO database subscription renewal. He also reviewed the timeline.

7. Action Item – Approval of the fiscal year 2025 budget & membership fees

The approval took place along with an overview from Skog.

Musil (Tinley Park Public Library) motioned, seconded by Cottonaro (Alsip-Merrionette Park Public Library). Voting results: 41 YES, 0 NO, 60 ABSENT, motion passed.

8. Action Item – Amend fiscal year 2024 budget for single sign-on project expense.

Weseloh (West Chicago Public Library District) motioned, seconded by Waltman (Homewood Public Library District). Voting results: 41 YES, 0 NO, 60 ABSENT, motion passed.

9. Information Item – SWAN platform survey results

Skog reviewed the survey results. Discussion ensued. Cottrill discussed the next steps.

10. Information Item – Introduction to new SWAN consulting arrangement

Brandwein discussed the new SWAN consulting arrangement.

11. Announcements and Questions

Berwyn Public Library and Homewood Public Library celebrating their 100th anniversary this year.

12. Next meeting: June 6, 2024

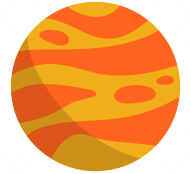
Cottrill ended the meeting at 11:11 a.m.

Minutes Prepared by Ginny Blake

Respectfully Submitted,



Illinois Databases



General Interest Resources	Academic (Undergraduate) Educational Resources
Auto Repair Source	Academic Search Elite
Biography Reference Source	AGRICOLA
Biography Reference eBook Subscription	ERIC
Ethnic Diversity Source	Health Source: Nursing/Academic Edition
EBSCO eBooks Diversity & Ethnic Studies Subscription Collection	LGBTQ+ Source
History Reference Source	Library & Information Science Source
History Reference eBook Subscription	Professional Development Collection
Hobbies and Crafts Source	Psychology and Behavioral Sciences Collection
Home Improvement Source	Religion & Philosophy Collection
Legal Information Source	Health Resources
Legal Source	Alt HealthWatch
MasterFILE Complete	Health Source: Consumer Edition
MasterFILE Reference eBook Subscription	Health Source: Nursing/Academic Edition
Newspaper Source Plus	Business Resources
NoveList	Business Source Elite
NoveList K-8	Regional Business News
Small Engine Repair Source	Small Business Source
PreK-12 Educational Resources	Reference eBooks
ERIC	Book Collection: Nonfiction
History Reference Source	EBSCO eBooks Business Subscription Collection
History Reference eBook Subscription	EBSCO eBooks Cricket Media Subscription Collection
Literary Reference Source	EBSCO eBooks High School Subscription Collection
Literary Reference eBook Subscription	EBSCO eBooks K-5 Subscription Collection
MAS Complete	EBSCO eBooks 6-8 Subscription Collection
MAS Reference eBook Subscription	EBSCO eBooks K-8 Subscription Collection
Middle Search Plus	EBSCO eBooks Public Library Subscription Collection
Middle Search Reference eBook Subscription	Test Prep, Licensing, Certification, Career Prep and Workforce Skill Building Resources
Points of View Reference Source	LearningExpress Computer Skills Center
Primary Search	LearningExpress Job and Career Accelerator Center
Primary Search Reference eBook Subscription	LearningExpress Library Complete
Professional Development Collection	LearningExpress PrepSTEP Academic
Science Reference Source	LearningExpress PrepSTEP High Schools
Science Reference eBook Subscription	

PRELIMINARY:
provided for discussion

Memorandum

Date: May 17, 2024
To: SWAN Board
From: Aaron Skog, Executive Director
Re: Digital Access Discrimination Complaints & SWAN



There are shared concerns about a recent email and memo shared with library directors about complaints directed through the U.S. Department of Education Office for Civil Rights (OCR). I have included the email from Antioch Public Library District and the letter from the Office for Civil Rights.

Public libraries have a complex online presence. They rely on 3rd party vendors for digital access to research databases and e-content. A library could potentially have many of these vendor integrations be included in a complaint from OCR.

The good news is that some work in this area of 3rd party products meeting accessibility requirements has already been completed by Illinois libraries. It started with SWAN and other libraries working with RAILS under the DEI umbrella in 2021 to bring accessibility issues to the foreground, and there is a good resource compiled on the RAILS site under [Voluntary Product Accessibility Templates](#), or VPAT.

However, there are gaps in the vendor list on the RAILS database, which would include library catalogs used, such as Aspen Discovery used by SWAN, SHARE, and other libraries. Our main concern for SWAN is ensuring Aspen Discovery meets the accessibility standards for its users and to help shield libraries from a possible OCR complaint.

SWAN collaborated with the [company Deque](#) in 2021 through a DEI RAILS grant to present to libraries on the topic of website accessibility. Once we learned about the OCR complaint to Antioch Public Library, SWAN User Experience Manager Tara Wood reached out to Deque to obtain a quotation for two websites managed by SWAN: the Aspen Discovery catalog and the swanlibraries.net site used by library patrons; and the SWAN Libraries + app

We are still waiting for the cost from Deque. There are opportunities to seek out some cost sharing. One idea is SWAN could lead the assessment of Aspen Discovery and then seek contributions from ByWater Solutions and other libraries within the Aspen community since Aspen is a library open-source project.

RAILS has also issued a memo on this topic from the attorneys at Ancel Glink. This topic was to be covered at the RAILS Membership Update on May 8th but that meeting was cancelled. I have included the RAILS memo as part of the SWAN Board meeting packet on May 17, 2024.

Jennifer Drinka

From: Kutch, David <David.Kutch@ed.gov>
Sent: Thursday, March 21, 2024 2:19 PM
To: Jennifer Drinka
Subject: Notice of digital accessibility investigation in OCR No. 05-24-4030 (Antioch Pub. Lib. Dist.)
Attachments: Not_Let_to_RP_-_Antioch_Public_Library_District_-_05-24-4030.pdf

Dear Superintendent Drinka,

Please see the attached notification letter for your review. OCR is opening a digital accessibility investigation into the Antioch Public Library District ("Library"). I am a member of OCR's National Digital Access Team, and will be the Library's primary point of contact throughout the duration of this investigation.

I believe it will be possible to resolve this matter quickly; I'd like to schedule a Teams call with you or a designee(s) of your choosing for the week of April 1st or next to get the ball rolling. I will need to work with the individual primarily responsible for the purchasing and maintenance of the Library's website, as well as with the folks responsible for putting together documents intended for broad public distribution in a digital format (event flyers, resource guides, etc., e.g.).

My current availability for the weeks of the 1st and the 8th is below. A one hour call should be ideal. Please let me know if any of these times work. I can send times for the next week if necessary.

Date	Time (all times Eastern)
Monday, April 1	10am-4pm
Tuesday, April 2	Noon-4pm
Wednesday, April 3	10-11am; 3-4pm
Thursday, April 4	11am-1pm; 2-3:30pm
Monday, April 8	10am-4pm
Tuesday, April 9	Noon-2pm; 3-4pm
Wednesday, April 10	10am-1:30pm; 3-4pm
Thursday, April 11	11am-3:30pm

Thanks so much. I'm looking forward to working with you and your colleagues on this matter.

Very respectfully,
David

David Kutch | Civil Rights Attorney
U.S. Department of Education | Office for Civil Rights (OCR)
National Digital Access Team (NDAT)
David.Kutch@ed.gov | 202-987-1453 (office) | 904-742-6889 (cell)
[NDAT Technical Assistance Video Series](#)



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE FOR CIVIL RIGHTS

RENAISSANCE TOWER
DALLAS, TEXAS 75270

REGION VI
LOUISIANA
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TEXAS

March 21, 2024

By email only to: jdrinka@apl.d.info

Jennifer Drinka
Executive Director
Antioch Public Library District
757 North Main Street
Antioch, Illinois 60002

Re: OCR Docket No. 05-24-4030
Antioch Public Library District, Illinois

Dear Executive Director Drinka:

On March 8, 2024, the U.S. Department of Education (the Department), Office for Civil Rights (OCR), received a complaint filed against the Antioch Public Library District (the Library) alleging discrimination based on disability. Specifically, the Complainant alleges that the Library is failing to afford persons with disabilities an opportunity to participate in and benefit from the services, programs, and activities communicated through the Library's websites and third-party websites that is equal to opportunities afforded to others.

OCR enforces Title II of the Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12131 *et seq.*, and its implementing regulation, 28 C.F.R. Part 35, which prohibit discrimination on the basis of disability by public entities. As a public entity, the Library is subject to Title II.

Because OCR has determined that it has jurisdiction and that the complaint was filed timely, it is opening this disability discrimination allegation for investigation. Specifically, we will investigate the following issues:

- Whether the Library, on the basis of disability, excluded qualified persons with disabilities from participation in, denied them the benefits of, or otherwise subjected them to discrimination in its programs, activities, aids, benefits, or services in violation of the regulation implementing Title II at 28 C.F.R. § 35.130.
- Whether the Library failed to take appropriate steps to ensure that its communications with applicants, participants, members of the public, and companions with disabilities are as effective as its communications with others, in violation of the regulation implementing Title II at 28 C.F.R. § 35.160(a).

Please note that opening an allegation for investigation in no way implies that OCR has made a determination with regard to its merits. During the investigation, OCR is a neutral fact-finder,

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collecting and analyzing relevant evidence from the Complainant, the Library, and other sources, as appropriate. OCR will ensure that its investigation is legally sufficient and is dispositive of the allegation(s), in accordance with the provisions of Article III of OCR's *Case Processing Manual*. The Complainant may have a right to file a private suit in Federal court whether or not OCR finds a violation.

Please see [OCR's Complaint Processing Procedures](#), including information about:

- Regulatory prohibitions against retaliation, intimidation, and harassment of persons who file complaints with OCR or participate in an OCR investigation; and
- Application of the Freedom of Information Act and the Privacy Act to OCR investigations.

Additional information about the laws OCR enforces is available on [OCR's website](#).

OCR intends to conduct a prompt investigation of this complaint. The regulation implementing Title VI of the Civil Rights Act of 1964, at 34 C.F.R. § 100.6, which is incorporated by reference in the Section 504 regulation at 34 C.F.R. § 104.61, requires that a recipient of Federal financial assistance make available to OCR information that may be pertinent to reach a compliance determination. Pursuant to the Title II regulation at 28 C.F.R. § 35.171(a)(3), OCR uses its Section 504 procedures to investigate Title II complaints.

Thank you for your cooperation in this matter. OCR may request documents from the Library and may need to interview individuals at the Library with knowledge of the facts of this case. If OCR determines that an onsite visit is necessary, OCR will contact you to schedule a mutually convenient time for its visit.

A complaint may be resolved prior to the conclusion of an OCR investigation when the recipient expresses an interest in resolving the allegations, OCR's investigation has identified issues that can be addressed through a resolution agreement, and OCR determines that it is appropriate to resolve the allegations. In such cases, OCR obtains a resolution agreement signed by the recipient. The agreement must be tied to the allegations and the evidence obtained, and it must be consistent with applicable regulations. Additional information about this voluntary resolution process may be found on [OCR's website](#).

Upon receipt of this letter, please provide OCR the name, title, address, email address, and telephone number of the person who will serve as the Library's contact person during OCR's investigation of this complaint.

We are committed to prompt and effective service. If you have any questions regarding this matter, please contact me at 202-987-1453 or David.Kutch@ed.gov.

Sincerely,

A handwritten signature in blue ink, appearing to read "D. Kutch".

David Kutch
Attorney

Jennifer Drinka

From: Kutch, David <David.Kutch@ed.gov>
Sent: Monday, April 22, 2024 8:48 AM
To: Jennifer Drinka
Subject: attached for signature - resolution agreement in OCR No. 05-24-4030 (Antioch PL)
Attachments: Resolution Agreement in OCR No. 05-24-4030 (Antioch PL) - for signature.pdf

Dear Executive Director Drinka,

Pursuant to our conversation earlier this month, I have attached to this email a resolution agreement for your signature to resolve the above referenced matter.

I am happy to schedule a meeting to answer any questions about the Agreement during the 30 day negotiation period that I am triggering with this email. Although we have thirty days to negotiate, I would love to get this agreement signed before the end of next week. If there are any feasibility issues with that timeframe, here's my availability so we can get together the week after that. If the team would like to meet earlier let me know.

Date	Time
Monday, May 6	9am-3pm Central
Tuesday, May 7	Noon-3pm Central
Wednesday, May 8	9am-1pm, 2-3pm Central
Thursday, May 9	9am-3pm Central

I am looking forward to working with the Library on this. Thank you for the Library's ongoing commitment to improving digital accessibility for the community it serves.

Very respectfully,
David

David Kutch | Civil Rights Attorney
U.S. Department of Education | Office for Civil Rights (OCR)
National Digital Access Team (NDAT)
David.Kutch@ed.gov | 202-987-1453 (office) | 904-742-6889 (cell)
[NDAT Technical Assistance Video Series](#)

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Resolution Agreement

Antioch Public Library, Illinois OCR Docket No. 05-24-4030

To resolve the above-referenced complaint investigation brought under Title II of the Americans with Disabilities Act (Title II), the Office for Civil Rights (OCR) of the U.S. Department of Education and Antioch Public Library (the Library) enter into the following Agreement. This Agreement is entered into voluntarily, and it does not constitute an admission of liability, non-compliance, or wrongdoing by the Library.

The Library will engage in the following activities to ensure its programs, services, and activities communicated or facilitated online are accessible to people with disabilities:

1. Adopt an Accessibility Standard. Within 30 days of signing this Agreement, the Library will adopt a widely-accepted accessibility standard, such as the Web Content Accessibility Guidelines (WCAG), version 2.1, level AA, or another standard that requires an equivalent level of accessibility for people with disabilities.
 - a. Reporting Provision: Within 30 days of signing this Agreement, the Library will submit for OCR's review and approval its chosen accessibility standard.
2. Provide Notice. Within 30 days of signing this Agreement, the Library will prominently post a fully-accessible Notice on the Library's website describing how people with disabilities can inform the Library of any technology-based barriers to access they have encountered and how they can request access to the underlying Library program, service, or activity.
 - a. Reporting Provision: Within 30 days of signing this Agreement, the Library will submit for OCR's review and approval the location and content of its Notice, as well as protocols and timeframes for responding to reports of barriers.
3. Conduct an Audit. Within 120 days of signing this Agreement, the Library shall complete an Audit to identify barriers to access to its online programs, services, and activities. The Audit shall consist of taking an inventory and engaging in manual testing to identify barriers, as follows:
 - a. Undertake an Inventory of Pages to be Tested. The inventory will consist of: (1) URLs on the Library's domain, including the Library's homepage, first-level landing pages, and all web page templates not otherwise captured; and (2) all URLs outside of the Library's domain, including those on all vendor-hosted or third-party-hosted sites, including social media sites and video hosting services used by the Library to communicate or facilitate its programs, services, and activities to members of the public.
 - b. Engage in Manual Testing to Identify Barriers. For all pages (and associated electronic documents and videos) in the inventory undertaken pursuant to the preceding paragraph, the Library will engage in robust manual testing to identify

barriers to access for people with disabilities. The testing shall, at a minimum, meaningfully incorporate the protocols and address the questions set out in Appendix A. Vendor or third-party hosted pages in its inventory will be assessed alongside those over which the Library has full operational control.

- c. Reporting Provision: Within 120 days of signing this Agreement, the Library will submit for OCR's review and approval the results of its Audit, including the URLs for all inventoried pages, its testing protocols, and detailed testing results for each tested URL including associated electronic documents and videos.
4. Engage in Remediation. As barriers are identified, the Library will remediate those barriers; all barriers will be remediated fully within six months of the signature date of this Agreement. Barrier remediation will conform to the Library's chosen accessibility standard.
 - a. Where barrier removal would impose an undue burden or fundamental alteration under Title II, the Library will provide alternate measures that, at a minimum, afford a person with a disability the opportunity to acquire the same information, engage in the same interactions, and enjoy the same services, programs, and activities as a person without a disability in an equally effective and equally integrated manner, with substantially equivalent ease of use.
 - b. Where the Library does not have the ability to effectuate immediate, full remediation of a vendor's or third party's technology, the Library will request that the vendor complete its remediation of all barriers within six months of the signature date of this Agreement, and the Library will immediately offer appropriate interim alternate measures until the technology has been verified to be barrier-free including, but not limited to, prominently posting a way for people with disabilities to request access to the same information using an alternative method. If the vendor or third party fails to remediate timely all barriers, the Library will exercise all avenues for compliance, including seeking to replace the vendor or moving or duplicating the programs, services, and activities to a digital venue within the Library's control. The Library will continue to provide interim alternate measures until the barriers have been remediated.
 - c. If the Library replaces a technology vendor, or moves from an in-house technology to a vendor-hosted technology, the Library will follow these steps, at a minimum, during its procurement process to achieve compliance:
 - i. In any requests for proposals, the Library will require bidders to commit to remediate noted barriers so the technology conforms to the Library's adopted accessibility standard prior to delivery and throughout the life of the contract.
 - ii. Before determining a winning bidder, the Library will select the product that most closely conforms to the Library's adopted accessibility standard;

if there are two or more products that equally conform to such standard, the Library may employ other factors to decide the winning bid. The Library will engage in independent testing or otherwise confirm the validity of any vendor-offered accessibility assessment of its own product.

- d. Reporting Provision: Each time the Library determines alternate measures are required in lieu of immediate barrier removal, it will immediately submit those proposed measures to OCR for review and approval. If the alternate measures are being proposed to overcome a perceived undue burden or fundamental alteration, the Library will clearly indicate the factors it considered in making such a determination, for OCR's review and approval. No later than six months after this Agreement was signed, the Library will notify OCR that it has fully remediated all barriers identified on the inventoried pages, including associated electronic documents and videos.
5. Update Testing and Remediation Protocols. Upon receipt of the notice provided in the preceding paragraph, or earlier if requested by the Library, OCR will assess the effectiveness of the Library's testing protocols and remediation steps by conducting its own testing on a representative sample of the web pages, electronic documents, and videos identified by the Library pursuant to paragraph 3(c), using the Library-adopted standard as an appropriate measure of compliance. The Library will then participate in all video conferences requested by OCR, and, when appropriate, request that relevant vendors participate in such conferences, so OCR can share concerns or violations regarding any remaining barriers that impede the ability of people with disabilities to have equal opportunities to enjoy the Library's underlying programs, services, and activities. These video conferences may also address any noted deficiencies regarding the Library's Notice.
- a. Based on OCR's concerns or violations shared during the video conferences, the Library will:
 - i. Make appropriate changes to its testing and remediation protocols, and may require its vendor(s) to engage in appropriate barrier removal;
 - ii. Re-test or engage in additional remediation tailored to address OCR's concerns as appropriate; and
 - iii. Within 30 days of the relevant video conference, notify OCR that the Library is ready for OCR to re-test the original pages, along with a list of any additional URLs that the Library believes are representative of barrier-free web pages, electronic documents, and videos, as appropriate, from which OCR may select for additional testing.

This process shall continue until, in OCR's judgment, the Library's testing and remediation protocols result in equal opportunities for people with disabilities.

6. Develop a Plan to Maintain Accessible Features. The Library will develop a Plan regarding how it intends to maintain the accessibility of the services, programs, and activities communicated or facilitated online, including updated testing and remediation protocols; revised procurement protocols and language; ongoing training for web developers, procurement officials, and content creators; designations of responsibility; and appropriate levels and sources of funding to support ongoing efforts.
 - a. Reporting Provision: Within one year of signing this Agreement, the Library will submit for OCR’s review and approval its Plan to Maintain Accessible Features.
7. Disclaimer. Nothing in this Agreement should be construed to mean that any content and functionality – including lower-priority content and functionality – is not subject to the requirements of Title II.

By signing the Agreement, the Library agrees to provide data and other information in a timely manner in accordance with the reporting requirements of this Agreement. During the monitoring of the Agreement, if necessary, OCR may visit the Library, interview staff and students, and request such additional reports or data as are necessary for OCR to determine whether the Library has fulfilled the terms of the Agreement.

The Library understands that OCR will not close the monitoring of the Agreement until such time as OCR determines that the Library is in compliance with the terms of the Agreement and the statutes and regulations at issue in the case.

The Library understands that OCR may initiate administrative enforcement proceedings or refer the case to the Department of Justice (DOJ) for judicial proceedings in the event of breach. Before initiating such proceedings, OCR will give the Library notice of the alleged breach and 60 calendar days to cure the alleged breach.

This Agreement will become effective upon the signature of the representative for the Library, set out below.

Jennifer Drinka
Executive Director
Antioch Public Library

Date

Appendix A

For the purposes of this Agreement, testing must address these protocols and questions, which only represent a starting point, rather than a comprehensive set, for assessing digital technology to ensure access to people with disabilities. See [OCR's video series](#) for more information.

For web pages: Check the following across different browsers using different types of hardware (for documentation, please specify the browsers by version and different desktop/laptop configurations):

- Keyboard access: Can users access all functions and content, and complete all tasks, independently by using only the keyboard (<tab>, <enter>, <spacebar>, <esc>, and arrow keys)? Verify in particular:
 - There are no keyboard traps that would prevent a user from advancing through the entire page, such as an automatically-refreshing social media embedded feed (*tip: try to tab very, very slowly through any such feed to observe whether a user can close it, or move past it, at a reasonable point; if the feed keeps refreshing by automatically adding additional entries to be shown, it causes a trap for those who are unable to use quick keyboard strokes – or a mouse - to navigate*);
 - Expandable elements can not only be expanded, but can also be collapsed automatically or with a keyboard command, so they do not block other content.
- Logical reading order: Does keyboard navigation follow a logical, predictable order?
- Skip links: Can keyboard-only users bypass long navigation menus, embedded social media feeds, etc., without having to use excessive tabbing?
- Visual focus indicator: Can users visually track where they are located on the page while navigating with a keyboard?
- Alternative (Alt) text: Are all important images and graphics labelled with meaningful text, associated captions, or adjoining descriptions so, for example, people who are blind and use assistive technology will have access to the relevant information contained in the image or graphic? For linked images, does the alternative text tell users where the link will take them, rather than describe the image?
- Links: Are links well-named and unambiguous so users who are blind– without having to read nearby content – will understand the purpose and destination of each link? Common examples of ambiguous link names include “click here,” “read more,” “see all,” “http://...”-type, or “event notice,” and other ambiguous phrases.
- Color alone: Are there any instances where color alone distinguishes an object or state? If so, add another way to distinguish the object or state. For example, make sure color is not

the only way to distinguish link text from the surrounding paragraph text, and ensure color-coding is not the exclusive way used to convey important calendar dates (e.g., “no school” dates are marked in purple).

- Color contrast: Using an eyedropper tool or other manual method (automated testing is generally insufficient unless manually verified), is there at least a 4.5:1 contrast ratio for normal size text and a 3:1 contrast ratio for large scale text, comparing foreground and background colors of all text elements and text inside graphics? Text inside logos can be ignored for these purposes.
- Tables: Does the page avoid using layout tables? If data tables are present, are they necessary to convey information, or could a more accessible means of presentation be considered instead? If a data table is used, is it simple, so no cells span multiple columns or rows? Are column and row headers programmatically labelled?
- Buttons, form controls, and other operable elements: Are they labelled appropriately, both programmatically and visually? Do the visual labels continue to be properly associated with the elements when the screen is enlarged? If the elements have different states (such as form fields that are required for successful submission), are those conveyed by something other than color alone?
- Heading structure: Are headings programmatically labelled with a meaningful hierarchy, so people who are blind and using a screen reader can navigate a page according to its headings, listen to a list of headings, and skip to where they want to begin reading?
- Embedded videos and slide carousels: Where there are embedded videos or carousels, if they launch or rotate automatically, is that behavior necessary? If so, can a user pause or stop the video or carousel, and later replay the video or carousel, with keyboard commands? The ability to stop the video or carousel rotation can be important, not just while users are on the video or carousel, but while they are in other parts of the page.
- Magnification: Have you re-tested everything when content is magnified to the “point of reflow,” or in “responsive mode,” when the formatting changes to be more mobile-friendly (typically around 200% on standard laptop screens)? Are all contents and all functionality preserved and useful?
 - Paying particular attention to any “hamburger menus,” or expandable menus, can they be opened, navigated (including any sub-level items), and closed automatically or easily with the keyboard?
 - Is logical reading order on the page preserved, without the need to scroll right to left? If vertical scrolling is required inside windows or objects, can it be done with the keyboard?
 - Do elements meant to be together (such as form labels and text entry boxes) stay together upon magnification?

For electronic documents: In addition to addressing the questions above, have you conducted an accessibility review of your documents using the software's accessibility checker (e.g., "Check Accessibility" feature in Microsoft Word, "Accessibility Check" feature in Adobe Acrobat Pro DC, etc.)?

For videos:

- Is captioning present or is a transcript available? Transcripts should only be used when the audio can be fully understood separately from viewing the video and does not reference video content.
- Does the captioning or transcript meaningfully convey the contents of the audio track (not just phonetically)?
- Does the captioning or transcript indicate the names or appropriate descriptions of the speakers, if more than one person is speaking?
- Does the captioning or transcript use capitalization and punctuation appropriately, if that is important to understanding the contents?
- Is important on-screen information also conveyed audibly, so people who are blind or have low vision have access to the contents?

For social media posts:

- If graphic images are used, are they accompanied by text that conveys the same information?
- If videos are used, are they accessible as described above?

Aaron Skog

From: Directors Only <DIRECTORS@LIST.RAILSLIBRARIES.ORG> on behalf of Monica Harris <Monica.Harris@RAILSLIBRARIES.ORG>
Sent: Monday, May 6, 2024 3:07 PM
To: DIRECTORS@LIST.RAILSLIBRARIES.ORG
Subject: [DIRECTORS] Office for Civil Rights' Digital Access Discrimination Complaint
Attachments: Memo to RAILS RE OCR Complaints 4881-5654-4185 v.4.pdf

Hello Colleagues,

Following Secretary Giannoulas' meeting with RAILS public library directors on April 22, we were made aware of a complaint shared by the Office of Civil Rights of the U.S. Department of Education related to alleged discrimination based on disability. Specifically, these complaints are related to a library's website and whether that web experience is equal to the opportunities afforded to those without disability. Similar complaints were received by at least two public libraries in Illinois, and it was relayed that the complainant may intend to file against other Illinois public libraries in the future.

In anticipation that more complaints may be received by RAILS members in the future, we reached out to Ancel Glink and asked them to write a memo related to the process, investigation, and resolution of an Office for Civil Rights' digital access discrimination complaint. This is intended to be a general support for this process, and you are encouraged to work with your own legal counsel should you receive a similar complaint. This memo is attached to this email and will also be available via the RAILS website later this week.

RAILS has been pursuing a variety of strategies to support Illinois libraries that want to better understand how to be compliant with digital accessibility. If this topic is of interest to you, I would like to encourage you to attend our next [RAILS Member Update](#) on Wednesday, May 8th, from 3-4pm on Zoom. A presentation on digital accessibility for libraries by Keith Hays, ADA IT Coordinator at the University of Illinois, Urbana-Champaign is on the agenda.

Thanks to the libraries that shared their experience with us. Sharing that information allows us to work with our library partners across Illinois to better prepare us all for the best possible accessibility for users.

Sincerely,

Monica



Monica Harris

Executive Director

Reaching Across Illinois Library System

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MEMORANDUM

To: Monica Harris, Executive Director
Reaching Across Illinois Library System

From: Julie Tappendorf
Katherine Nagy

Subject: Office for Civil Rights' Digital Access Discrimination Complaints

Date: May 1, 2024

You forwarded to us a copy of a complaint filed against an Illinois library with the Office for Civil Rights of the U.S. Department of Education (“**OCR**”) alleging discrimination by the library based on disability. This complaint alleges that an Illinois library is failing to afford persons with disabilities an opportunity to participate and benefit from the services, programs, and activities through the library website that is equal to the opportunities afforded to others. We understand that similar complaints have been filed or will be filed against other Illinois libraries in the future, and you asked us to review the complaint and provide guidance to your membership.

This memo will explain the federal complaint and investigation process and provide guidance on compliance with the investigation process.

I. OCR Complaint Process

OCR enforces Title II of the Americans with Disabilities Act of 1990 (“**ADA**”), which prohibits public entities from discriminating on the basis of disability in services, programs, and activities.¹ Libraries fall under the definition of a “public entity” and are subject to the regulations of the ADA.²

Individuals can file complaints with OCR if they believe they have been discriminated against by a public entity within 180 calendar days of the last act of discrimination. The complaint must identify the kind of discrimination alleged and describe the alleged discriminatory conduct.

¹ 28 CFR § 35.101.

² 42 U.S. Code § 12131.

The complaint you forwarded to us alleges discrimination to persons with disabilities, including that the library has excluded persons with disabilities from participating in programs, activities, or services and has failed to ensure that the library's communications with applicants, participants, and members of the public are as effective as its communications with others. Although not expressly stated in the complaint, the resolution agreement with the library who was the subject of the complaint seems to focus on online communications, including website accessibility.

Because these complaints allege discrimination regarding library online communications, including website accessibility, it is important to note that the Department of Justice recently issued rules requiring that libraries and other government bodies comply with Web Content Accessibility Guidelines by April 26, 2027.³ Library adoption of the DOJ's website accessibility guidelines should help mitigate against future allegations of discrimination for online library communications, and the OCR resolution agreements discussed in **Section III** below require the adoption of accessibility guidelines to resolve online communication-related discrimination complaints.

Once OCR receives a complaint, it has to determine whether it has the authority to investigate based on the following questions:

- Whether the complaint alleges a violation of any of the laws OCR enforces;
- Whether the complaint is timely; and
- Whether the complaint contains enough information to proceed to investigation.

If OCR needs more information regarding a complaint, it can contact the complainant, and complainant has 20 calendar days to respond to OCR's request unless the complainant requests additional time. If OCR determines it will investigate the complaint, it will issue letters (likely via e-mail) to the complainant and the library's executive director. The fact that OCR opens a complaint for investigation does not make a statement on the merits of the complaint. Instead, it simply means the complaint meets the requirements of OCR in that it was timely, alleges a violation of a law OCR enforces, and contains enough information to proceed to an investigation.

II. OCR Investigations

Once the OCR has determined it has jurisdiction to investigate a complaint, OCR will conduct an investigation to determine (1) whether the library, on the basis of disability, excluded qualified persons with disabilities from participation in, denied them the benefits of, or otherwise subjected qualified persons to discrimination in its programs, activities, aids, benefits of services; (2) whether the library failed to take appropriate steps to ensure that its communications with

³ 89 FR 31320

applicants, participants, members of the public, and companions with disabilities are as effective as its communication with others.

OCR acts as a neutral fact-finder in the investigation and will collect and analyze relevant information it receives from the complainant, the library, and other relevant sources. OCR investigative methods include reviewing documentary evidence submitted by both parties, conducting interviews of the complainant and library personnel, and site visits.

An OCR investigation team member will reach out to the library with a description of the issues raised in the complaint. The investigator will also request an initial discussion with the library's executive director or designee and the library staff responsible for the specific activities that raised concerns in the complaint. For claims of discrimination regarding libraries' online accessibility, this will likely include the staff members primarily responsible for purchasing and maintaining of the library website and the staff members responsible for drafting documents in a digital format for broad public distribution.

Libraries should respond promptly to all communications with OCR and comply with all requests for discussions and documentary evidence to aid OCR in its fact-finding investigation.

It is important to note that OCR can release information it has collected if it receives a request under the Freedom of Information Act. OCR can also release information regarding the complaint to the press or general public, including the name of the library, the type of alleged discrimination in the complaint, and the result of the investigation.

At the conclusion of OCR's investigation, OCR will determine whether:

- There is insufficient evidence to support a conclusion the library failed to comply with the law, or
- A preponderance of the evidence supports a conclusion that the library failed to comply with the law.

OCR will send its determination in a letter of findings to the complainant and library. Regardless of OCR's findings, a complainant could still have a right to file suit in federal court. However, OCR would not represent the complainant in any court proceedings.

III. Resolution of Complaints

Complaints can be resolved in a number of ways, including: (1) settling with OCR and voluntarily agreeing to a "resolution agreement" prior to the conclusion of an investigation; (2) voluntarily agreeing to participate in an alternative resolution process (mediation); or (3) through an OCR determination that the library failed to comply with the law; or (4) that there is insufficient evidence to support the allegations that the library failed to comply.

A. Settlement with OCR via a Voluntary Resolution of a Complaint Under Investigation (Resolution Agreement)

A complaint can be resolved prior to the conclusion of OCR's investigation if the library expresses an interest in resolving the complaint and OCR determines a resolution agreement is appropriate to address the concerns identified in OCR's investigation. In that case, OCR will share a draft resolution agreement with the library and the library will have a period of up to 30 calendar days to reach a final agreement with OCR. If a final agreement is not reached within this time period, OCR will resume its investigation.

The resolution agreement will include specific actions the library agrees to take to resolve the compliance concerns, which might include:

- Adoption of an accessibility standard, such as the Web Content Accessibility Guidelines (WCAG);
- An audit to identify barriers to online accessibility;
- Remediation of accessibility barriers identified by OCR;
- Development of a plan to maintain accessible online features;
- Timeframes for implementing the specific actions; and
- Reporting mandates to OCR to ensure compliance with the resolution agreement.

These agreements are completely voluntary, and do not constitute any admission of liability or wrongdoing on behalf of the library. OCR will monitor the agreement to ensure the Library is complying with the terms of such agreement. If a library allegedly breaches the agreement, OCR will give the library 60 calendar days' notice to cure the alleged breach. OCR may initiate administrative enforcement proceedings or refer the matter to the Department of Justice for judicial proceedings in the event of an uncured breach.

A copy of a recent resolution agreement with an Illinois public library is included with this memorandum.

B. Voluntary Alternative Resolution Processes (Mediation)

OCR offers early mediation if the complainant expresses interest at the time of filing the complaint. OCR also offers mediation during the investigation if it determines mediation is appropriate for the complaint and both the complainant and recipient library express interest in mediation.

OCR serves as the impartial mediator between the parties but has no oversight over the mediation agreement reached between the parties. These mediation processes are confidential, and the parties are required to sign a confidentiality agreement.

If mediation is successful, OCR will obtain a copy of the signed agreement, or a statement signed by the complainant that the allegations were resolved. OCR does not monitor or enforce the agreement, but if a material breach occurs, the complainant has the right to file a new complaint.

C. Resolution of Complaint Upon a Determination of Noncompliance

If OCR determines that a library failed to comply with OCR-enforced laws after it concludes its investigation, it will contact the library to attempt to secure a voluntary resolution agreement as provided in Subsection A above of this memorandum. OCR will share a proposed resolution agreement with the library and the library will have a period of up to 90 calendar days to reach a final agreement with OCR. If a final agreement is not reached within this time period, OCR will issue an impasse letter that informs the library it will issue a letter of impending enforcement action in 10 calendar days if a resolution agreement is not signed within that time period. An enforcement action might include (1) initiation of administrative enforcement proceedings or (2) referral of the matter to the Department of Justice for judicial proceedings.

IV. Conclusion

Based on the potential for litigation against a library or even a Department of Justice proceeding, a library who is notified by OCR that a complaint of discrimination has been filed should take the matter seriously and cooperate with and assist OCR in its fact-finding investigation. In the event that the investigation discloses ADA concerns, libraries might want to consider an early resolution of the complaint through a “resolution agreement” which will provide the library with time to come into compliance and avoid the matter being referred to the Department of Justice.

Upon receipt of a discrimination complaint, libraries should reach out to their library attorney for guidance. A library may also want to forward a copy of the complaint to their insurer or claims representative to put them on notice of the complaint – while defense of this type of complaint may or may not be covered by insurance (that depends on the policy coverage), because the allegations in the complaint could lead to further litigation if not resolved, the insurer should be put on notice.

Finally, libraries should begin to work towards the 2027 deadline established by the DOJ to adopt web content accessibility guidelines.

SWAN Platform survey analysis

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

April 19, 2024

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.

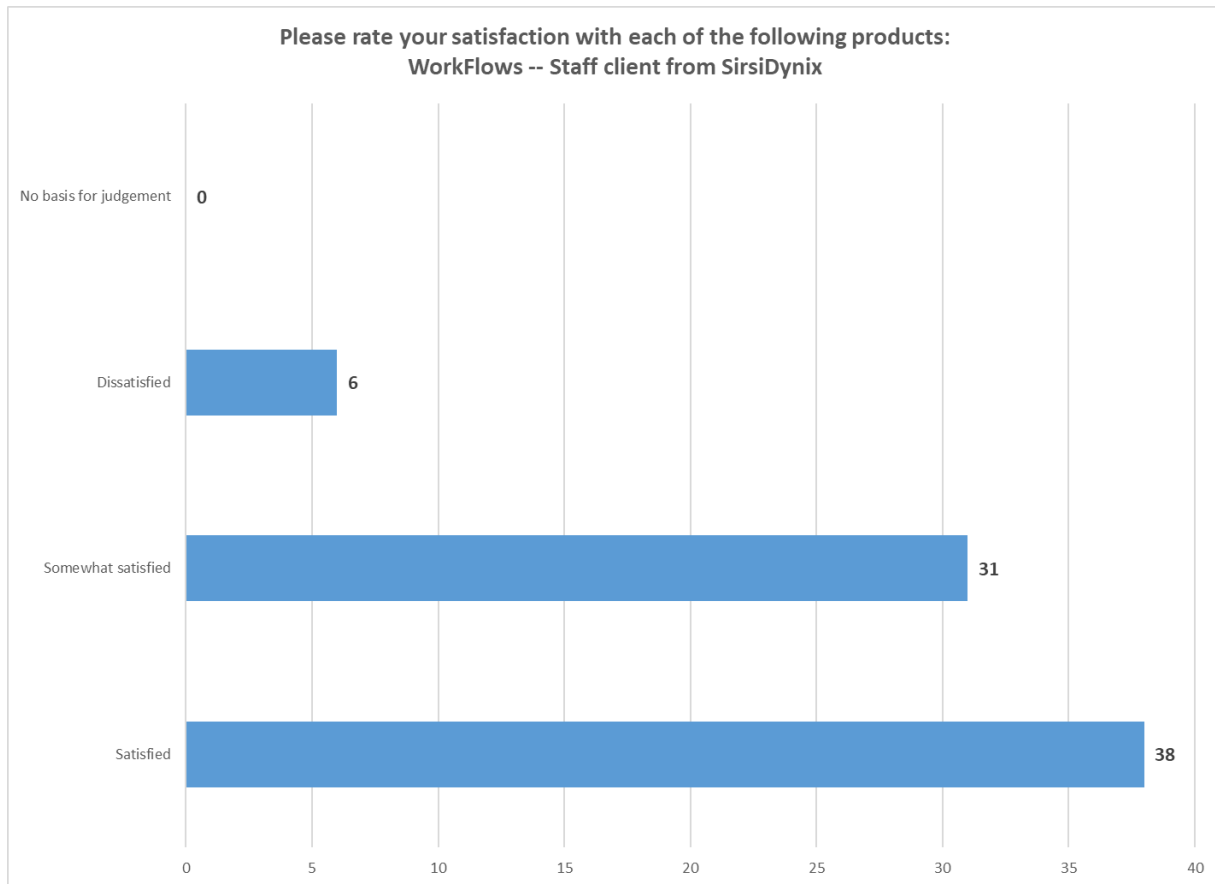
Process

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

- Some member libraries noted that the ability to be logged in on more than one computer simultaneously was beneficial to being able to complete daily tasks, highlighted the searching capability to successfully answer patrons' questions regarding title availability or the number of books checked out, and expressed overall satisfaction with WorkFlows and how easy it is to use to perform necessary tasks.
- 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.

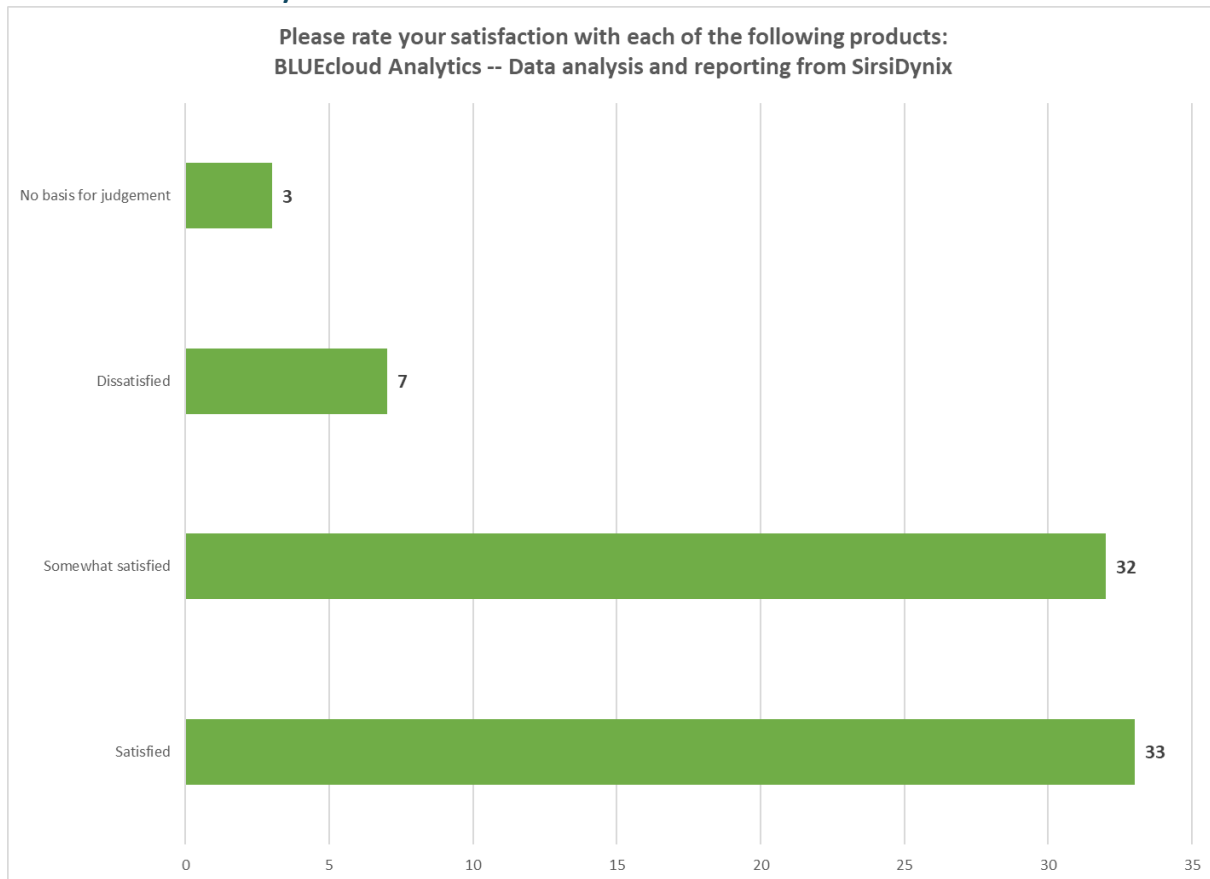
Action steps

- 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

- Some members praised BLUEcloud Analytics' templates and ease of use, particularly for running yearly IPLAR reports. They also appreciated SWAN staff's expertise on the platform.
- 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

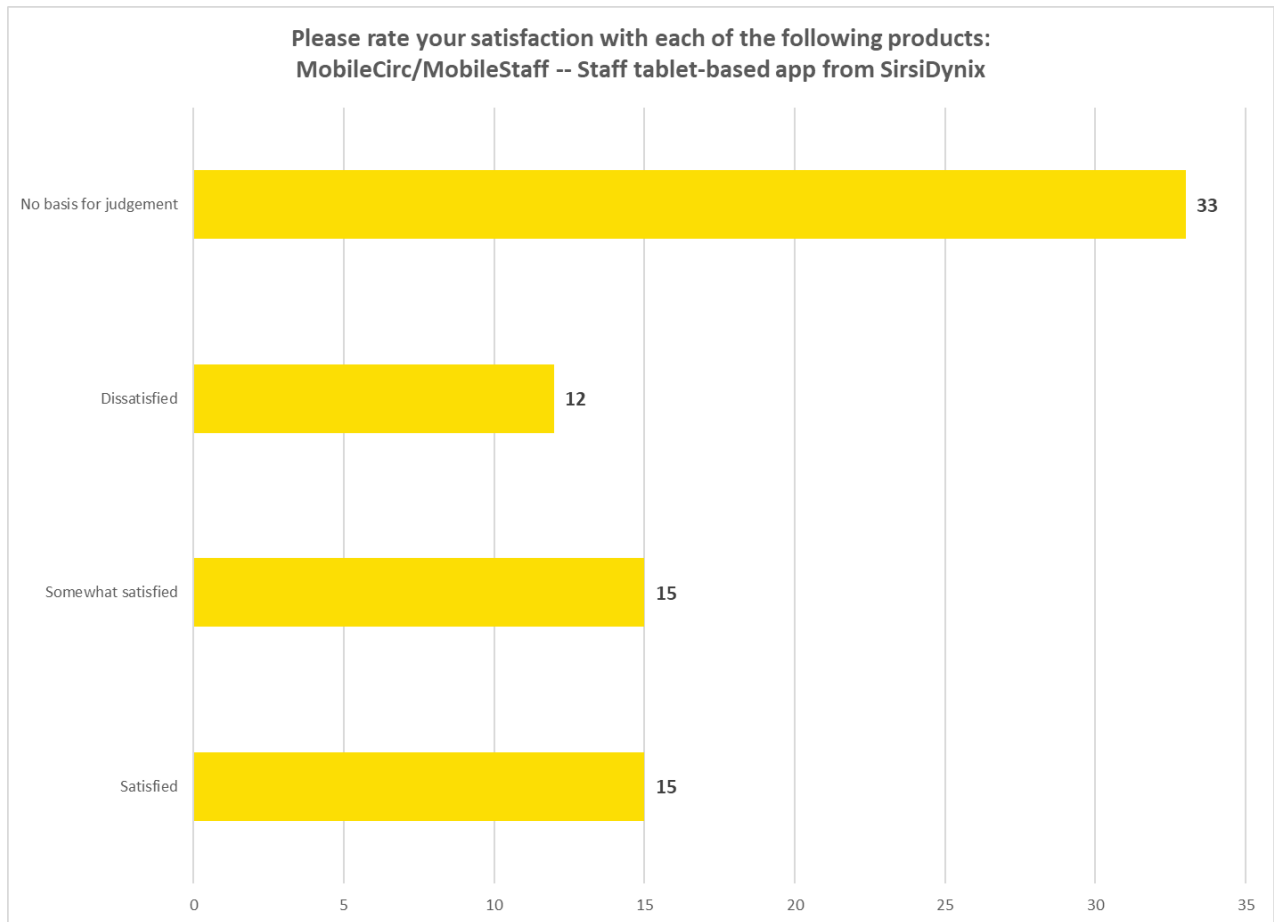
- We have several training opportunities based on comments, such as creating training videos on how to run different reports and customize them for the library.
- SWAN staff can conduct research with members to enhance report labeling and folder organization, and better understand the delivered reports 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 3rd 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.

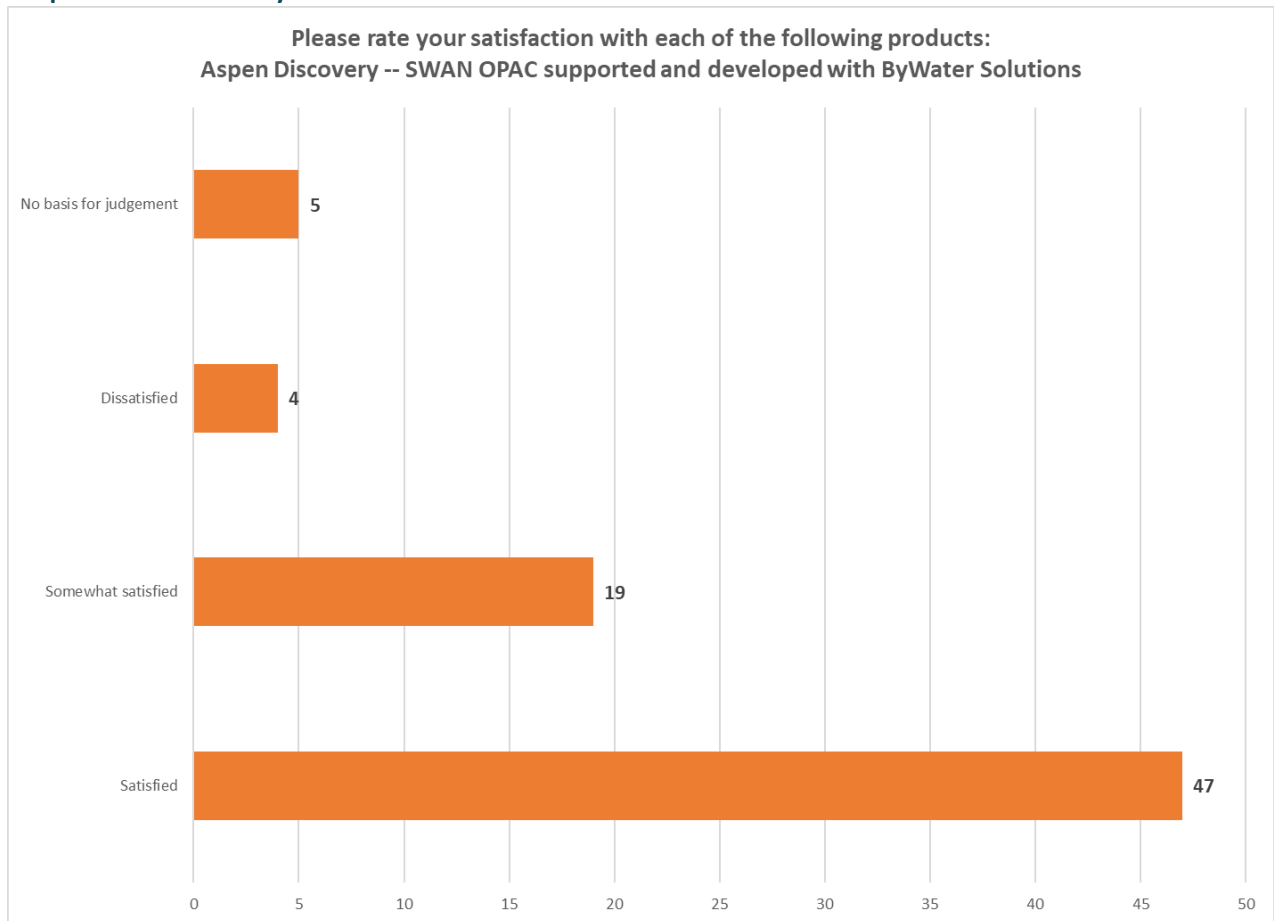
Action steps

- 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

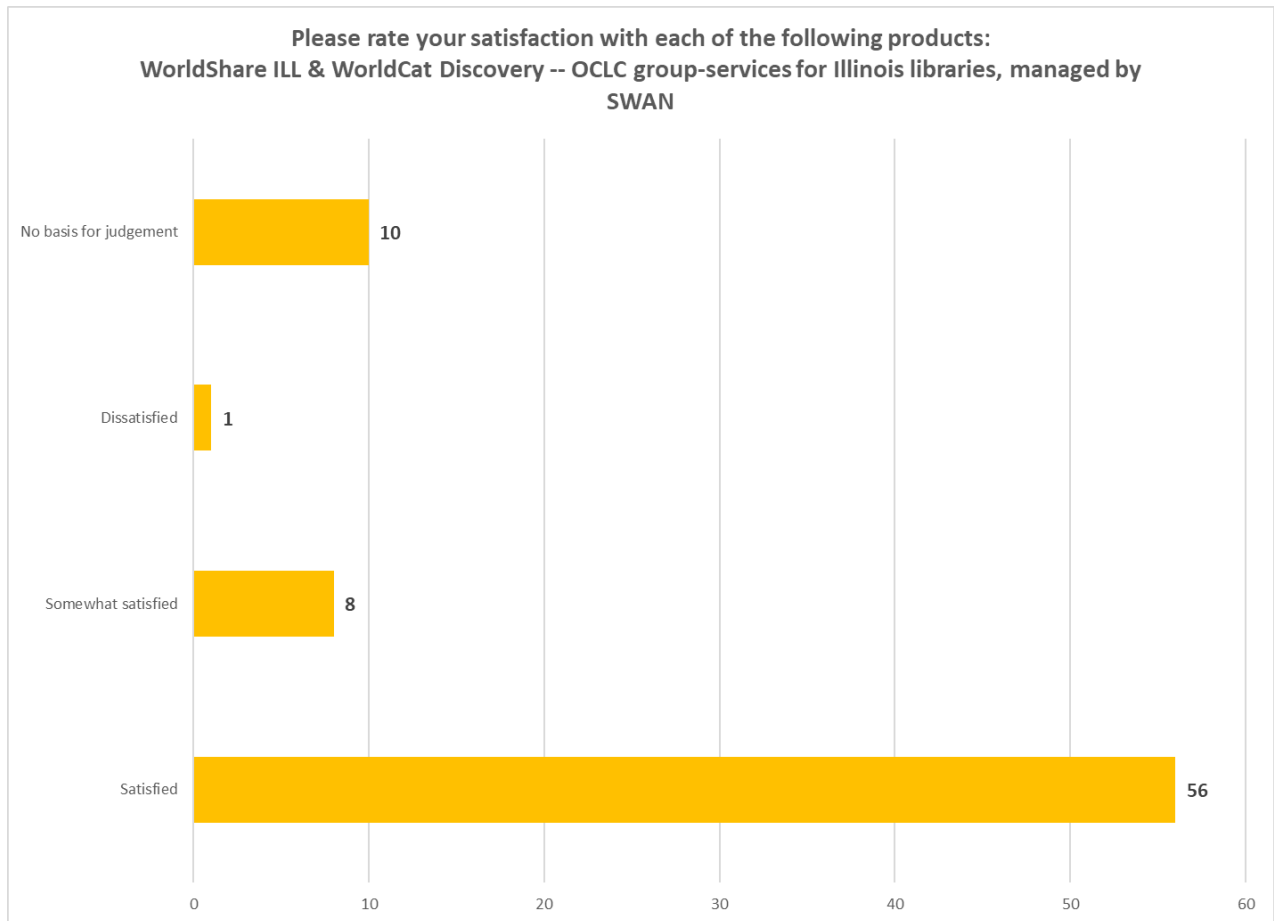
- Several libraries mentioned patron satisfaction with the catalog search.
- Library staff appreciate the patron service and readers advisory tools in Aspen: masquerade mode, search facets, lists, and browse categories.
- Some libraries also praised the frequency of development of new features in Aspen and specifically the support and development from ByWater Solutions.
- 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.
- Libraries are overall very happy with the record grouping feature in Aspen, but there is room for improvement. 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. However, staff appreciate the ability to upload covers.

- 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 smoother pipeline to transmit ideas for improvement from member staff to the Aspen community.

OCLC



Issues and themes

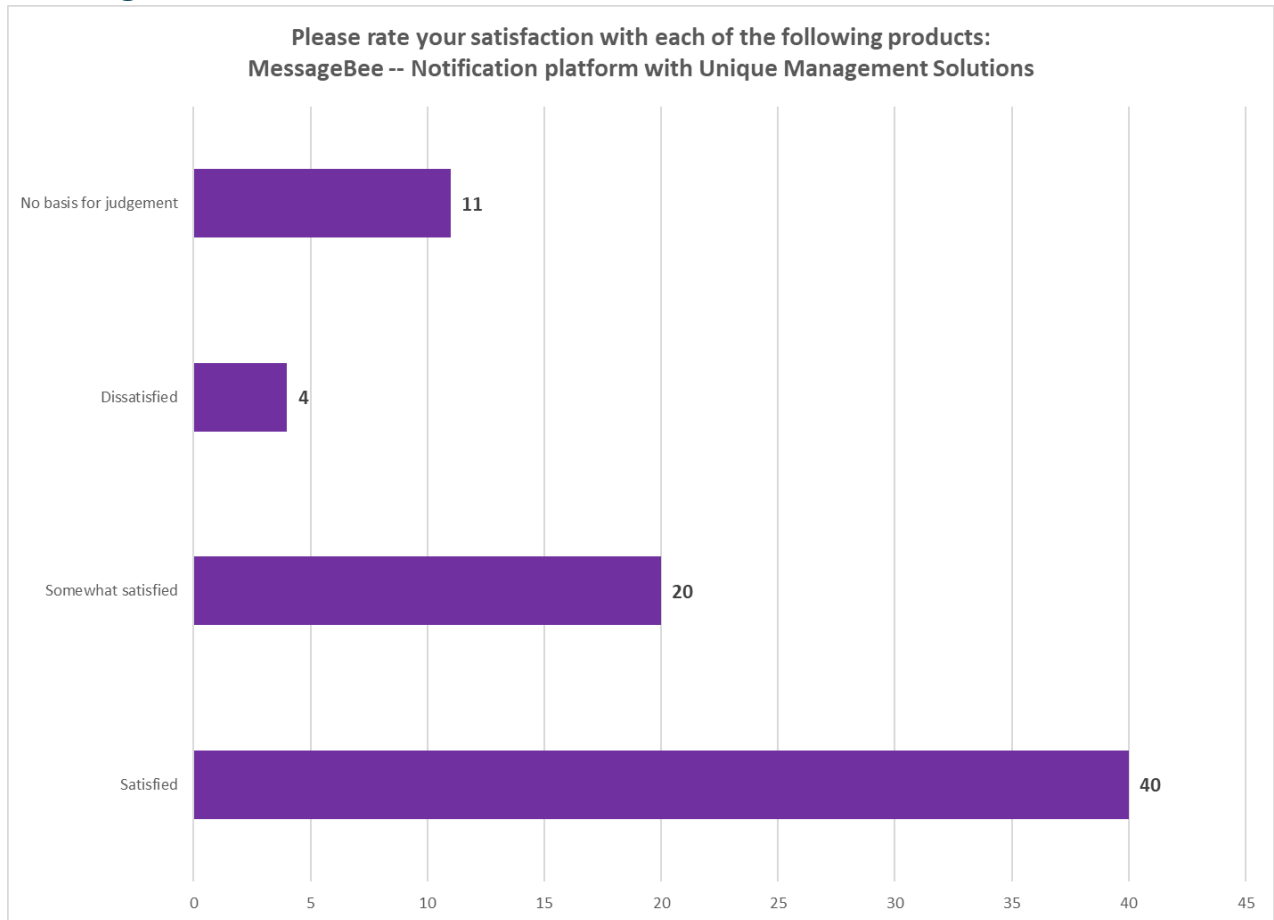
- WorldCat and WorldShare are easy to use, and in general, the library staff appreciated the efforts SWAN has put in to make ILL run efficiently.
- A couple of staff requested training in OCLC's further functions or suggested that no training at all is offered.
- WorldShare ILL is by far the most common point of interaction for our members, and they are generally satisfied. Some pointed out UI issues such as general clunkiness or the inability to copy requests for decrease input. Some mentioned intermittent error messages and performance issues.
- Two libraries mentioned issues with holdings not accurately reflecting library collections.
- A library highlighted Record Manager's difficulty of use and suggested an update to WebDewey's interface.
- A couple of interface updates to WorldCat were also requested.

Action steps

- Promote the existing SWAN training on WorldShare ILL at SWAN events such as Fireside and user group meetings.

- Discover what areas of OCLC are in demand by our membership. Were requests for training related to ILL, Collection Manager, Catalog and Record Manager? Investigate existing OCLC training options to promote or opportunities to create our own when necessary.
- Holdings issues will be remedied by the launch of the 2.0 version of the Metadata API, which will fix an error in holdings maintenance we have been experiencing. We can also follow up with the two libraries who mentioned holdings issues to better understand the issue since tickets related to this issue are infrequent.
- SWAN will continue to track development Record Manager’s cataloging and holdings maintenance abilities, but at the moment we don’t recommend it as a central tool in the SWAN toolbox. OCLC Connexion client meets the needs of our catalogers.

MessageBee



Issues and themes

- MessageBee is easy to use and considered an excellent product with a lot of options and is a “fantastic upgrade.”
- Notification reporting features are valuable.

- The simplicity of the two-way SMS messaging tool was brought up as a criticism. The interface only displays phone number and no other patron information, and it cannot be turned off with an auto-response programmed. One library expressed interest in integrating it with their existing SMS platform.
- Reliability of notification receipt was a major concern for one library, including the possibility for patrons to opt out of e-mail messages without it being reflected in the interface.
- The interface and e-mails for reports and statistics can be clumsy for some users, who wish they could filter categories in which no notifications were sent. One library requested more granular statistics.
- Ten libraries mentioned the lack of autorenewal notifications. This is a similar number of libraries as was reflected in our user group discussions at the end of 2023.

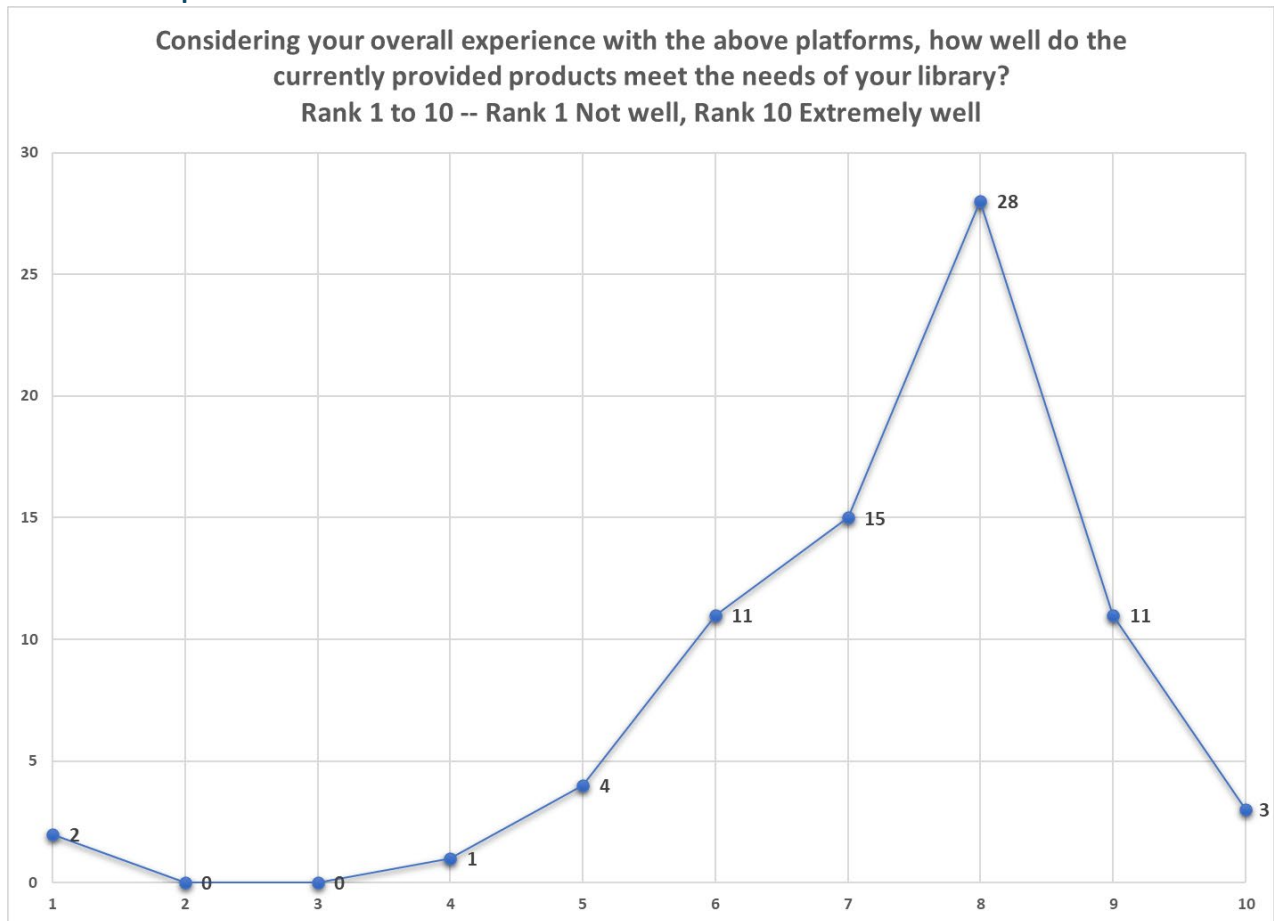
Action steps

- The Two-Way SMS messaging is something that we are expecting to see updated as Unique Management continues its overall user interface update this year. SWAN staff will talk with Unique staff to communicate member concerns with this tool and attempt to steer the update.
- Patron opt-outs that are not reflected in the interface include marking messages as spam in e-mail and replying “STOP” to an SMS notification. Neither of these things are well-communicated in MessageBee and rely on library staff to discover these message rejections by viewing reports. SWAN would like to work with Unique to build a better tool for catching these situations.
- The reports interface upgrade is underway, and SWAN members have access to the beta. Some of the issues pointed out in this survey are addresses in the beta site. SWAN can discuss with Unique Management when these changes can be reflected in automated e-mail reports.
- We will perform a cost-analysis of how re-implementation of autorenewal notices would impact the consortium.

Big ideas

- We plan to investigate improving autorenewal processing to include more attempts over a period of days to try and increase the proportion of successful autorenewed items.

Overall experience



This analysis of the survey on the six platforms focused on creating actions for the issues identified with each of the software platforms. It is also worth noting that the overall rating for the software platforms shows a majority of the respondents rating 7 or higher, which is 76% of the total.

ILS Migration comments

There were five libraries that left comments on a possible ILS migration. Two mentioned Polaris as a choice to consider. The comments below reflect the difficult balance SWAN is attempting with the complexity of our resource sharing and the staff client.

St Charles

“I would hesitate to change ILS unless the alternate product has been proven in a consortium of our size. Every ILS has problems, and it is a laborious process to change.”

Steger

“From my own experience in other libraries and from speaking with my peers in other library systems, I would be very happy to see a different ILS as this one isn't very intuitive and is difficult to train new staff to use.”

General satisfaction

When praise for a specific platform was shared, those were inserted into the Issues and Themes above. Some of the comments were more general about the overall satisfaction of the software platforms provided. We have included three of them below.

Warrenville

“After speaking with managers, it is generally felt that all staff have loved the decision to join SWAN in 2020. The overall service is good, and the easy, increased access to more material for our patrons is wonderful. Managers stated that what is done well is great. And on the whole, SWAN is on the cusp of being great, but does need some improvements to address some of the frustrations many deficiencies in some of the platforms are more than made up for by the friendly, responsive, and comprehensive support we get from SWAN staff.”

Roselle

“For the products we are satisfied with, I think it's fair to say that the interfaces and functionality are clear and easily fit into our workflow. It's really about being able to do your job quickly and efficiently without an overly burdensome learning curve or needing to constantly retrain yourself on how to use basic features. I'm optimistic based on the platforms we are satisfied with, that it's just a matter of time before the other products meet those same criteria as they are replaced one by one...”

Bloomingtondale

“SWAN staff utilize the current platforms and with thoughtful planning and innovative ideas enhance the resource-sharing experience of our users. The best example of that is how SWAN deployed the Aspen Mobile app in record time when the Sirsi app was unexpectedly dropped.”

Comments on survey design

There was one comment about the survey itself, requesting more granular ratings below and above “somewhat.” Two comments noted that the library used a survey tool internally to obtain all library staff feedback, which was then aggregated with individual comments into the full response submitted.

Conclusion

The analysis of the survey comments on SWAN software platforms has provided valuable insights into the strengths and weaknesses of each platform. The detailed examination of issues and themes, along with suggested action steps and big ideas for improvement, will help the SWAN management team address the challenges faced by member libraries. Overall, the majority of respondents rated the software platforms positively, indicating a general satisfaction with the services provided. The feedback gathered from the survey will guide future decisions on software enhancements and potential ILS migration, ensuring that SWAN continues to meet the needs of its member libraries effectively. By implementing the proposed action steps and big ideas, SWAN can enhance the user experience and further strengthen its resource-sharing capabilities.