



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

**Meeting Packet**

September 5, 2024

10:00 A.M.



# SWAN Administrators' & Directors' Quarterly Meeting

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September 5, 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#/registration>

## Agenda

1. Call to Order and Welcome
2. Public Comment
3. Introduction of New Library Directors
4. Action Item – Approval of the June 6, 2024 Quarterly meeting minutes (Exhibit pgs. 3-4)
5. Information Item – SWAN Board Environmental Scan Task Force update
6. Information Item—Gale proposal for subscription e-resources
7. Discussion Item—Revision to SWAN networking & working groups
8. Discussion Item – Online patron registration options for SWAN libraries (Exhibit pgs. 5-13)
9. Information Item – SWAN Expo 2024 recap
10. Announcements and Questions
11. Next meeting: December 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

June 6, 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 March 7, 2024, Quarterly meeting minutes

Weseloh (West Chicago Public Library District) motioned, seconded by Waltman (Homewood Public Library). Motion carried by unanimous vote.

## 5. Information Item – Board election for 2024

Contrill announced the two new board members, Dawn Bussey (Glen Ellyn Public) & Zach Musil (Tinley Park Public Library).

## 6. Information Item – Statewide subscription database announcement

Skog gave an overview of the Illinois State Library Resource Program and how this will impact SWAN. Olivia Montolin explained the statewide deal & SWAN EBSCO current deal. The discussion led to consensus that SWAN should move forward with its EBSCO All-inclusive Package offer.

## 7. Discussion Item - Website accessibility challenges for public libraries & SWAN's role

Skog discussed the background of website accessibility. He also explained what VPAT is and shared a memo on RAILS website that outlines the legal requirements.

## 8. Information Item – Comics Plus SWAN deal for 2024

Olivia Montolin discussed the upcoming Comics Plus deal.

**9. Information Item – Symphony 4.1 upgrade on June 17<sup>th</sup> & 18<sup>th</sup>**

Scott Brandwein gave an update on Symphony 4.1 upgrade and what to expect with the upgrade.

**10. Discussion Item – SWAN platform survey analysis**

Skog summarized the survey analysis along with the follow up.

**11. Information Item – Uses of banking ACH for SWAN payments**

Skog explained the use of ACH for payments vs. sending a check through the mail and the savings associated with it. SWAN will send a letter to all libraries with the details of the use of ACH payments with the upcoming Quarterly invoices.

**12. Announcements and Questions**

The SWAN Expo registration is now open.

**13. Next meeting: September 5, 2024**

**Cottrill ended the meeting at 11:29 a.m.**

Minutes Prepared by Ginny Blake

Respectfully Submitted,

# SWAN Online Patron Registration Research



SWAN Quarterly meeting, September 5, 2024

## Introduction

SWAN currently uses an in-house tool for patron registration, which allows patrons to register online for a temporary card to immediately use online resources with the ability to obtain a full card after visiting their home library in person. There are opportunities to improve upon the features of online registration and provide more robust, ongoing support by moving online registration to Aspen Discovery or a third-party provider.

As of 2024, 63 SWAN libraries use the SWAN online registration tool. 6 libraries use an alternate online registration tool, and two use both the SWAN online registration tool in addition to another tool.

At some point this next year, SWAN will need to transition from our in-house patron registration tool over to a new version. This report outlines the features available through Aspen Discovery and two third-party providers, Patron Point and Quipu, and some basic cost estimates.

## Feature summary and definitions

### Registration forms

The registration form would collect all necessary information from the patron at the time of registration. Features to consider with registration forms include:

- **Customization:** Can the form be customized on a per-library basis versus a shared form across the consortium, can we add custom fields (e.g. for notice preference).
- **Format standardization** i.e. correcting information entered by the patron before it is passed to the ILS.
- **Statement of responsibility:** An agreement page the user must complete to apply for a card, either customized on a per-library basis or shared across the consortium.
- **Home library assignment:** Can the form automatically assign the users home library based on address verification, or does the user need to select a home library.
- **Languages:** Form can be offered in more than one language.

## Welcome emails

Welcome emails are delivered to the patron after a successful registration, with details about their account and information about the library. Features to consider with welcome emails include:

- **Customization:** Can the emails be customized on a per library basis, or is one email template shared across the consortium with library details dynamically populated (e.g. library name, contact information, etc.).

## Address verification

Address verification checks the patron's entered address and confirms it is a valid address.

At the most basic level, a tool can verify that the address is a valid USPS address. At a more advanced level, a tool can use a map of the library district in the form of a shape file to verify that the patron lives in the library district.

## Identity verification

Some tools will verify that a patron actually lives at the entered address.

- **Basic verification:** Checks USPS Change of Address information and marketing databases; this is not as reliable as advanced verification but comes at a lower cost.
- **Advanced verification:** Through an additional third-party provider, verifies identity against multiple points of data using the same technology banks and credit card companies use; this is more reliable, but comes at a higher cost.

## Duplicate checking

Online registration tools can check the ILS to ensure the same patron is not registering multiple times. Tools typically check using name and birth date.

## Provisional cards

An online registration tool may provide only a provisional, or temporary card, that requires the patron to come into the library to verify their identity to receive a full access card.

Libraries can choose to use online registration to issue a full access card, but may want to issue a provisional card as a fallback to patrons in some cases, for example if they did not pass the automated identity verification in the tool.

## Non-resident registration

Some online registration tools can handle registration for non-residents; for example, they may be able to issue a provisional card for non-residents. Or they may direct a patron to the library’s web page with information for non-resident card application.

## Card renewal

Online registration and online card renewal are typically two separate processes and tools. If libraries wish to allow patrons to renew their cards online, they may need to provide a separate tool for patrons who already have a card to renew near the time their card expires.

## Minor registration

Online registration tools can provide a process for parents or guardians to register cards for minors. This typically adds additional fields to collect both parent/guardian information and minor information. Any identity verification would be performed against the parent/guardian.

## Feature comparison

<b>Feature</b>	<b>SWAN Online Patron Registration</b>	<b>Aspen Discovery Self Registration</b>	<b>Quipu eCard</b>	<b>Patron Point eCard</b>
<b>Custom registration form</b>	One for consortium	Custom per library	One for consortium	One for consortium
<b>Formatting standardization</b>	Yes	Yes	Yes	Yes
<b>Statement of responsibility</b>	One for consortium	Custom per library	One for consortium	One for consortium
<b>Home library assignment</b>	Manual	Manual	Automated	Automated
<b>Languages</b>	One	Unlimited	2 included, cost for additional	TBD
<b>Welcome emails</b>	One form for consortium	Custom per library	One form for consortium	One form for consortium
<b>Address verification</b>	None	Valid USPS address	Valid USPS address in library district	Valid USPS address in library district

<b>Identity verification</b>	None	None	Basic or advanced, at additional fee	Advanced, at additional fee
<b>Duplicate checking</b>	Name and birth date	Name and birth date	Name and birth date	Name and birth date
<b>Full or provisional cards</b>	Provisional	Provisional	Full with provisional fallback	Full with provisional fallback
<b>Card renewal</b>	None	None	Yes for an additional fee	Yes for an additional fee
<b>Non-resident registration</b>	None	None	Provisional card fallback	Redirect to website
<b>Minor card registration</b>	None	Yes	Yes	Yes

## Costs

The costs below were obtained by a quote and are presented here as basic information. The detailed costs would be defined in a new quote if SWAN wanted to move forward with a consortium-wide solution.

	<b>Aspen Discovery Self Registration</b>	<b>Quipu eCard</b>	<b>Patron Point eCard</b>
<b>Annual fees (address and ID verification)</b>	Not additional cost; included in annual maintenance with ByWater Solutions	\$32,000 (30k)	\$16,500 (30k)

## Identity verification costs

Between May 2023 and May 2024, SWAN had approximately 75,000 total library card registrations in 1 year, excluding patron records added when Addison Public Library joined the consortium. Approximately 15,000 of those registrations were patrons under 13 years of age, and 20,000 were under 18 years of age.

**Patron Point** pricing uses a per transaction fee for identity verification. SWAN has confirmed that parents or guardians registering multiple minors would be verified one time.



**Quipu** has both basic and advanced identity verification. Advanced pricing is based on tiers and exceeding 30,000 transactions would place us in a higher pricing tier. We do not have cost estimates for the higher pricing tiers. Basic identity verification only incurs a setup fee, but it may not be advanced enough for our libraries' needs.

SWAN also reached out to **ByWater Solutions** about potential development for the Aspen Discovery Self Registration tool to incorporate identity verification. An integration with a third-party identity verification provider could be developed; that provider would then incur transaction fees that SWAN could pay directly.

## Card renewal costs

Aspen Discovery Self Registration does not offer an online renewal option.

Patron Point and Quipu both offer card renewal options for an additional fee. Quipu has provided a quote for those libraries in SWAN that do not use an expiration of NEVER. Patron Point cannot provide firm pricing at the moment, but additional identity verification would incur the same \$0.30 per transaction fee.

While SWAN could further pursue a group purchase for card renewal, this becomes more complex as many libraries in SWAN do not expire patron cards. In addition, libraries that currently expire cards may want to pursue a policy change over implementing an additional online card renewal service.

## Privacy, security, and accessibility

All online registration tools pass patron information directly to the ILS without the need to store any patron data.

However, online card renewal for Quipu eCard or Patron Point would require storage of patron information outside of SWAN's Symphony ILS in order to trigger the renewal process. SWAN would need to work with the vendor on data storage and retention procedures if a card renewal process was implemented.

Online registration forms for all three alternate platforms can be made accessible. The forms for Quipu and Patron Point are embedded in the library's website and/or Aspen and would inherit accessibility features and styles from the site.

## Conclusion

The current SWAN in-house tool for patron registration has served its purpose but presents several limitations that impact functionality and efficiency. Transitioning to a more

advanced platform such as Aspen Discovery or a third-party provider like Patron Point or Quipu offers significant improvements in customization, verification, and support.

Aspen Discovery provides robust features with extensive customization options for forms and welcome emails, though it lacks integrated card renewal. Quipu eCard and Patron Point eCard both excel in offering advanced identity verification and card renewal options but come with higher costs and require careful consideration of their pricing models and data storage practices.

The decision to switch should be guided by a balance between desired features, cost implications, and potential impacts on patron experience. By adopting a more flexible and feature-rich registration system, SWAN can enhance its services, streamline processes, and better support its libraries and patrons in the coming years.

# Appendix

Public libraries currently using the SWAN online patron registration tool:

1. Acorn Public Library District
2. Bloomingdale Public Library
3. Linda Sokol Francis Brookfield Library
4. Blue Island Public Library
5. Berkeley Public Library
6. Broadview Public Library District
7. Bensenville Community Public Library District
8. Bellwood Public Library
9. Berwyn Public Library
10. Cicero Public Library
11. Chicago Heights Public Library
12. Chicago Ridge Public Library
13. Carol Stream Public Library
14. Crete Public Library District
15. Crestwood Public Library District
16. Downers Grove Public Library
17. Elmwood Park Public Library
18. Eisenhower Public Library District
19. Evergreen Park Public Library
20. Franklin Park Library District
21. Forest Park Public Library
22. Frankfort Public Library District
23. Glen Ellyn Public Library
24. Green Hills Public Library District
25. Grande Prairie Public Library District
26. Glenside Public Library District
27. Glenwood-Lynwood Public Library District
28. Harvey Public Library District
29. Hinsdale Public Library
30. Hillside Public Library
31. Homewood Public Library District
32. Itasca Community Library
33. Justice Public Library District
34. Kaneville Public Library District

35. Lansing Public Library
36. Midlothian Public Library
37. Messenger Public Library of North Aurora
38. Markham Public Library
39. Melrose Park Public Library
40. Matteson Area Public Library District
41. Maywood Public Library District
42. Northlake Public Library District
43. North Riverside Public Library District
44. Oak Park Public Library
45. Palos Heights Public Library
46. Palos Park Public Library
47. Prairie Trails Public Library District
48. River Forest Public Library
49. Roselle Public Library District
50. Richton Park Public Library District
51. Summit Public Library District
52. Stickney-Forest View Public Library District
53. Sugar Grove Public Library District
54. South Holland Public Library
55. Town and Country Public Library District
56. Villa Park Public Library
57. West Chicago Public Library District
58. Westchester Public Library
59. Wood Dale Public Library District
60. Worth Public Library District
61. Woodridge Public Library
62. Warrenville Public Library District
63. Westmont Public Library

Libraries using another online patron registration tool:

1. Geneva Public Library District (Jotform, mail)
2. Hinsdale Public Library (Webform, mail)
3. Indian Prairie Public Library (Patron Point)
4. La Grange Park Public Library District (Google Forms, email)
5. Midlothian Public Library (Jotform)
6. St. Charles Public Library (Microsoft Forms, mail)
7. Steger-South Chicago Heights Public Library (Google Forms, in person pickup)

8. Tinley Park Public Library (Patron Point)
9. Westmont Public Library (Webform, mail)

Libraries with no online registration:

1. Addison Public Library
2. Alsip-Merrionette Park Public Library District
3. Beecher Community Library District
4. Batavia Public Library District
5. Bedford Park Public Library District
6. Bridgeview Public Library
7. Calumet Park Public Library
8. Calumet City Public Library
9. Clarendon Hills Public Library
10. Dolton Public Library District
11. Flossmoor Public Library
12. Hodgkins Public Library District
13. La Grange Public Library
14. Lyons Public Library
15. McCook Public Library District
16. Oak Brook Public Library
17. Oak Lawn Public Library
18. Park Forest Public Library
19. University Park Public Library District
20. Riverdale Public Library District
21. River Grove Public Library District
22. William Leonard Public Library District
23. Riverside Public Library
24. Schiller Park Public Library
25. Nancy L. McConathy Public Library District
26. Thomas Ford Memorial Library
27. Thornton Public Library